

Financial Affairs Collaboration Team (FACT)

February 1, 2017

Minutes

Attendees: Alejandro, Aguirre, Anderson, Badulis, Calderon, Chester, Contreras, De Leon, Farre, Fuller, Gee, Guzman, Jensen, Iannolo, Kelley, Kuenz, Levin, Lopez, Lindsey, Maculsay, Prado, Saucedo, Smith, Vahovick, Valencia, Walls, Watkins

Absent: Apodaca, Galvin

Guests: Beechko

Guests

General

DACS - Matias and Jacqueline provided a status update and overview of the Delegation of Authority Form, developed through OnBase. This form is to request Authorized Approvers for specific chartfield strings over specific functions, similar to the Signature of Authority forms. Matias requested volunteers to be part of the Pilot Group.

Philanthropic Scholarship Report - Monica and Andrea shared a new report users can run in PeopleSoft that shows scholarship balances. All coordinators can access this report, after completing training with Roseanna Ruiz. The scholarship balance report, however, does not reflect endowment numbers. Lisa Iannolo sends endowment numbers at the end of the calendar year.

CSUSB Business Conference –Save-the-Date invitations have been emailed. Full invitations will go out on Monday and will include the agenda and link for registration. The event will take place in the SMSU Events Center A. Additional staff can be added to the invitation list - send Sarah Powell (spowell@csusb.edu) an email with attendee information.

CSU Business Conference – aka FOA conference. The CSU Business Conference is scheduled for May 8-10 in Anaheim. This conference includes all CSUs and CO. Registration opens at the end of February. Dena will forward registration information to the group once it becomes available.

Minimum wage increase – absorbed by departments.

Accounting

Auxiliary Financial Services

Budget

16/17 Summer Session Incentives/Cost Recovery – On hold for the divisions. A majority will go to covering Coyote First Step. Dena will share information regarding incentives once it becomes available.

Unit 11 16/17 Salary Increases – Alex is working on the methodology for distribution.

Support Services

David shared that CSUSB will be utilizing Marketplace, a platform where users can shop in a contracted vendor portal.

Cindy Levin shared that there is an additional level of security when making business rental car reservations using the CSUSB Enterprise Website accessed through the Facilities website for Enterprise and National. *(At this time the billing number is not required when using Concur)*. Cindy will share the Direct Bill # that will be required for direct pay with department/division budget analysts to share with appropriate business travelers in their respective areas.

Shannon Kelley gave the group a heads up that Accounts Payable is reassigning some duties. Adrienne Davis expressed interest in doing something different from travel, so she is assuming new responsibilities in the vendor area. Jennifer Skinner is currently being trained to assume responsibility auditing travel expense reports; while Jen is being trained, please direct travel related issues to Cindy.