Takin’ Care Of Business
At PSU

Dee Wendler

December 9, 2010
“Hot Topics”
Increased focus on:
- Regulatory Web/Regulatory Compliance
  – Compliance Officer
- Minority, Women Owned & Emerging Small Business (MWESB) Vendors
- Fiscal Irregularities
- Media, media media!!!

Six Audits in progress at PSU:
- Three Internal Auditors permanently stationed at PSU
- All Audit reports go to the State Board and become public records, accessible by the Media
Your Fiduciary Responsibilities

Ethics

Budgetary Compliance

Safeguarding Institution Funds

- Internal Controls
- Appropriate use of $$ & Assets
- Efficient/Economical Purchasing
- Accountability

APPROVALS!
Fraud Triangle

Pressure

Opportunity

Rationalization
“Hot Spots” For Auditors

• Purchasing Limits
• Procurement Card Transactions
• Personal Reimbursements
• Hosting
• Travel Reimbursements
• Contract Signature Authority
“Frequently Reviewed” Purchases:

- Department Meetings/Retreats
- Hosting
- Travel
- Personal Reimbursements!

“Frequently Reviewed” Points:

- Timeliness of Payment
- Business Purpose
- Delivery Address
- Proper Documentation
- Appropriate Approvals
“So what do I need to know???”
Purchasing

- **Limits**
  - $0 - $25,000 – direct buy!
  - $25,000 - $100,000 – 3 quotes required*
  - Over $100,000 – Formal Request for Proposal*

*Posted on OUS Website 3 day minimum – Contact Purchasing

- **Payment Options**
  - Invoice PSU Department
  - Centralized Billings
  - Visa P-Card
  - Costco Card

- *Avoid Personal Reimbursements!!*
VISA P-Cards

**Improved P-Card Module!**

- Vendors paid immediately!
- Transactions post directly to Banner
- Can change index or split charges
- Allows Services (1099 Reportable)

**Audited annually!!**

- Log and statement *must* be reviewed and *initialized* by Budget Authority *monthly!**
Centralized Billings

**Office Supplies/Hosting/Recruiting/Other**
- Office Depot/Office Max /Staples – discounts
- Costco - must use Costco card - pick up in Purchasing Department
- PSU Bookstore
- B & B Print Source (Business Cards/ Letterhead /Envelopes) - discounts
- Fed Ex-Kinkos – discounts
- Clean Copy
- Aramark
- Oregonian

**Travel**
- Airfare/Travel – Azumano, Journeys, Uniglobe
- Enterprise Rent-A-Car/Zipcar (within Oregon only)/Oregon Motor Pool
$saving$!!!

Centralized Billing vs. Reimbursements

Centralized Billing Saves $$$!
Personal & Travel Reimbursements

Who needs to sign?

- Claimant
- Department Approver
  - Supervisor or higher
  - If subordinate is delegated authority to sign, use their own name and have a delegation form on file
  - NO rubber stamps
  - Signature form must be on file with BAO
Signatures

Deans, directors, department chairs, and supervisors need to have signatures on file in BAO:

http://www.pdx.edu/media/b/a/BAO_department_authorized_signatures.pdf

- May Delegate Signature Authority for Travel and Personal Reimbursements:
  http://www.pdx.edu/media/b/a/BAO_delegated_signature_form.pdf

- Signatures may be pen & ink or electronic
  http://www.pdx.edu/media/b/a/BAO_facstf_access_request.pdf
Signatures

So what are you asked to sign?

- Travel Authorizations
- Personal & Travel Reimbursements
- P-Card Logs (if Budget Authority)
- Personal Services Contracts (Contract Officer must sign too!)
- Purchase Orders (electronic)
- Direct Payments (electronic)
- Monthly Account Reconciliations
- Key Requests
- Approvals for Banner access (E-BAR)

Responsibility includes approving expenses for **allowability, accuracy** and **budget control**
“Is there anything I shouldn’t sign???”

CONTRACTS!
What constitutes a contract?

- Lease agreements (copiers, printers, rentals)
- Memorandum of Understanding (MOU)
- Inter-governmental Agreement (IGA)
- Waivers/Hold Harmless Releases
- Hotel/Conference Agreements
- Facilities use agreements
- On-line “I accept” boxes

Hints that it might be a contract:
- Signature Required (may be electronic or by default!)
- Includes “Terms and Conditions”

When in doubt, call Purchasing, 5-3441!
“What questions are most often asked by Department Chairs?”
Hosting Requirements

• Original Itemized Receipt
• State Business Purpose/Benefit to PSU
• Names of Attendees
• 15% Gratuity Limit
• Cannot host PSU Employees *Only*
• Cannot use P-Card
• Approved rates:
  $10 Breakfast
  $15 Lunch
  $30 Dinner

*NO ALCOHOL!*
Department Meetings/Retreats

- *Must* Last more than 2 hours
- *Must* have a formal Agenda
- CLEAR Business Purpose
- Working Lunch (catered in)
Travel Reimbursements

*MUST Separate Personal from Business Travel*

- Itinerary should include the daily location, meals and lodging location of the traveler
- Personal time should be noted as “personal day”
- Itemized receipts must match the Itinerary

Travel Reimbursements should be turned in no later than 60 days after completion of trip. After 60 days a written explanation is required
Foreign Travel

FOR PER DIEM RATES U.S. DEPARTMENT OF STATE


Includes monthly per diem rates for Alaska, American Samoa, Guam, Hawaii, Johnston Atoll, Midway Islands, Northern Mariana Islands, Puerto Rico, Virgin Islands, and Wake Island.

International per diem rates

http://aoprals.state.gov/content.asp?content_id=184&menu_id=78
Foreign Travel

THE CURRENCY SITE

- Convert, print and attach to your travel reimbursement or use your visa conversion rate (must attach to document for support)

http://www.oanda.com/convert/classic

- An Excel Spreadsheet is available on the BAO website to use for foreign travel reimbursement:

http://www.pdx.edu/bao/forms/policies
#facstf_travel
Equipment

- **Sensitive Area!!**
- Physical inventory every **two years** – **Forms arriving in January, 2011!!** **Complete on time (March 15th)** and return it to BAO!
- **Equipment may only be used** for educational or research purposes, **not for personal gain**
- **Equipment must be returned** to PSU at the end of loan term
- **Use of personal equipment** for PSU business must be documented
Equipment Loans

- Equipment Loan Agreement - required when faculty and staff use PSU-owned equipment (laptops, cameras, PDAs, etc.) at their place of residence or other facilities off campus
Summary

- Know the policies and procedures, $dollar$ thresholds, and limitations
- Set the tone for an ethical environment
- Emphasize the official business purpose/benefit to PSU
- Complete the appropriate forms
- Obtain the appropriate signatures
- Be timely/Meet required deadlines
- Reconcile regularly!

Call us with questions!!
Questions???
IT Security and Compliance

Sharon E. Blanton, PhD
Chief Information Officer
503-725-9144
sblanton@pdx.edu
Security & Compliance

- Responsibilities
- Challenges
- Laws and Regulations
- Incident vs. Breach
- Contracts & RFPs
Security & Compliance

It’s complicated...
Therefore, we are highly regulated!

1. Local
   - Department Policy
   - College/University policy
   - System Policy/Regulations
   - Non Disclosure Agreements
   - Accreditor

2. State
   - Constitution
   - Consumer Protection
   - Identity Theft Law
   - Procurement

3. Federal
   - Higher Ed
   - Consumer
   - Financial
Compliance

**FERPA**: protection of student data

**FACTA Red Flag Rules**: finance

**Payment Card Industry Data Security Standard**: credit cards

**Gramm-Leach-Bliley (GLB) Act**: financial consumers

**USA Patriot Act**: data preservation and wiretapping requests

**Student and Exchange Visitor Information System (SEVIS)**: international students

**Higher Education Opportunity Act**: record keeping, business processes, and reporting

**Health Insurance Portability and Accountability Act (HIPPA)**: health records

**Digital Millennium Copyright Act (DMCA)**: protection of digital media
Electronic discovery (E-discovery): also Rule 37 of the Federal Rules of Civil Procedure


Oregon Identity Theft Protection Act: protection of Oregon consumers

OUS Information Security Policy: protection of OUS assets, business processes

PSU Information Security Policy: protection of PSU assets, business processes

PSU Acceptable Use Policy: protection of PSU systems
Security

ECAR Study 2006
Strategies to reduce Vulnerability

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Already Implemented</th>
<th>Implementation in Progress</th>
<th>Will Implement within 12 Months</th>
<th>Not Planning to Implement within 12 Months</th>
<th>Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limiting the types of protocols allowed through the firewall/router</td>
<td>87.1%</td>
<td>7.4%</td>
<td>1.4%</td>
<td>2.9%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Restricting and eliminating access to servers and applications</td>
<td>79.6%</td>
<td>14.9%</td>
<td>1.6%</td>
<td>2.5%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Timing-out access to specific applications after an idle period</td>
<td>77.0%</td>
<td>6.2%</td>
<td>2.7%</td>
<td>11.1%</td>
<td>3.1%</td>
</tr>
<tr>
<td>Instituting a recovery or backup plan in the case of disasters caused by natural events or by human acts</td>
<td>46.4%</td>
<td>30.8%</td>
<td>15.2%</td>
<td>6.2%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Isolating or quarantining computers that do not meet minimum security requirements</td>
<td>45.3%</td>
<td>18.6%</td>
<td>19.1%</td>
<td>14.3%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Installing closed desktop systems that don’t allow user configuration changes</td>
<td>37.0%</td>
<td>15.0%</td>
<td>3.1%</td>
<td>39.2%</td>
<td>5.7%</td>
</tr>
<tr>
<td>Limiting the URLs allowed through the firewall</td>
<td>34.7%</td>
<td>5.6%</td>
<td>3.9%</td>
<td>50.6%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Installing a software inventory system to watch for malicious software or program changes</td>
<td>16.4%</td>
<td>17.2%</td>
<td>12.5%</td>
<td>46.4%</td>
<td>7.4%</td>
</tr>
<tr>
<td>Using security devices (such as cards or biometric scanners) for authentication</td>
<td>14.0%</td>
<td>7.2%</td>
<td>10.7%</td>
<td>59.7%</td>
<td>8.3%</td>
</tr>
</tbody>
</table>
## Security

ECAR Study 2006

<table>
<thead>
<tr>
<th>Security Policies Implemented</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acceptable use of computers, e-mail, Internet, and intranet</td>
<td>97.8%</td>
</tr>
<tr>
<td>Data backups and secure off-site storage</td>
<td>89.1%</td>
</tr>
<tr>
<td>Access control, authentication, and authorization practices</td>
<td>85.1%</td>
</tr>
<tr>
<td>Vulnerability management (such as patch management or antivirus software)</td>
<td>85.1%</td>
</tr>
<tr>
<td>Physical security</td>
<td>81.4%</td>
</tr>
<tr>
<td>Individual employee responsibilities for information security practices</td>
<td>72.8%</td>
</tr>
<tr>
<td>Protection of organizational assets</td>
<td>72.8%</td>
</tr>
<tr>
<td>Managing privacy issues, including breaches of personal information</td>
<td>71.6%</td>
</tr>
<tr>
<td>Secure disposal of data, media, or printed material that contains sensitive information</td>
<td>71.0%</td>
</tr>
<tr>
<td>Incident reporting and response</td>
<td>68.9%</td>
</tr>
<tr>
<td>Disaster recovery contingency planning (business continuity planning)</td>
<td>68.4%</td>
</tr>
<tr>
<td>Investigation and correction of the causes of security failures</td>
<td>68.2%</td>
</tr>
<tr>
<td>Notification of security events to affected parties (individuals, law enforcement, campus organizations)</td>
<td>66.9%</td>
</tr>
<tr>
<td>Sharing, storing, and transmitting of institutional data (such as ISPs, external networks, or contractors’ systems)</td>
<td>51.3%</td>
</tr>
<tr>
<td>Data classification, retention, and destruction</td>
<td>50.6%</td>
</tr>
<tr>
<td>Identity management</td>
<td>50.0%</td>
</tr>
<tr>
<td>Security compliance monitoring and enforcement</td>
<td>49.0%</td>
</tr>
<tr>
<td>Change management processes</td>
<td>45.6%</td>
</tr>
<tr>
<td>Personnel clearances or background checks</td>
<td>38.1%</td>
</tr>
</tbody>
</table>
Data Breach Instances and Costs Continue to Rise

According to the Privacy Rights Clearinghouse (PRC), a non-profit consumer advocacy organization based in San Diego, California, the total number of records containing sensitive personal information involved in a security breach in the United States since January 2005 rose to approximately **355,868,866** million, up from **252,387,509** million in March 2009.

Given this staggering statistic, it's no surprise that the average cost of a data breach continues to trend upward, from $6.3 million in 2007 to $6.6 million in 2008 and $6.75 million in 2009, according to the Ponemon Institute's annual study.

While Ponemon attributes 24% of data breaches to sophisticated criminal attacks carried out solely for financial gain, it highlights that 42% of all cases in the study involved third-party mistakes, including negligence, system glitches and lost laptops.

http://cts.vresp.com/c/?GlobalDataGuard/c4f4d12086/d1a7f665f5/7649e0e7d8,
http://www.ponemon.org/index.php
Western Illinois University is notifying more than 180,000 people that their personal data is at risk after hackers entered its networks. June 2006


UC Berkeley Says Hackers Breached Database

But the hackers went undetected for months, administrators admit. May 11, 2009

http://www.internetnews.com/security/article.php/3819726
Data Security Breach at Valdosta State University

Students and faculty members at Georgia's Valdosta State University joined the ranks of thousands of other colleges and university communities victimized by hackers in the past year when the school's IT department discovered someone broke into a server storing the personal data of more than 170,000 people. February 2010

Broward College student data exposed
Library service software glitch creates breach at 6 colleges

Confidential information for about 126,000 students and employees at six community colleges — including Broward College — were publicly available on the Internet for five days, a state library service center announced Tuesday. August 2010

What do we do if when something happens?

It depends:

- Is it an incident?
  - Incidents require mitigation
  - Incidents may or may not require notification

- Is it a breach?
  - Breaches require mitigation
  - Breaches require notification

All breaches are incidents but not all incidents are breaches
What is a breach?

Two methods for Determining if a breach occurred:

1. By Definition
2. By Risk of Harm Analysis
   • How do you prove a negative?
Risk of Harm Analysis

Were the recipients obligated (by policy or regulation) to protect privacy and security of the information?

Can the impact of the disclosure be mitigated?
  Pre-existing NDAs or other measures which assure no further disclosure

Was it returned before improper use could occur?
  Did forensics investigation find any evidence of improper use, discovery, or distribution?

What was disclosed and how much?
Response Plan

Take actions to limit or eliminate the exposure.

Review the exposed material and determine the scope and nature of the incident. Number of unique disclosures or opportunities for disclosure To the best of ability determine if there is any evidence that the exposed information was accessed.

Arrange a meeting with General Counsel, CIO, and the data owner. Describe the incident, disclosures and the data found during the review. Determine whether the disclosure (or potential disclosure) meets the criteria in the FERPA, GLBA, HIPAA, PCI standards, state law or regulation

If yes,

If no clear evidence of disclosure, determine potential risk of harm

Draft and send a response to the individual that identified the disclosure
Draft a response to the individuals whose personally identifying information was exposed.
Determine the cause of the exposure.
Determine permanent solution and implement.
All IT related contracts need to be reviewed by OIT (security goes both ways)

All RFPs need to be developed in cooperation with OIT to ensure security compliance
Human Resources
Compliance Issues for Deans & Department Chairs

Cathy LaTourette
Office of Human Resources
HR for Academic Administrators

- HR role extends from selection through separation
- HRascals play a daily role in numerous important HR activities
- Many opportunities for proactive management, leadership and compliance
- Bold items indicate audit item
Selection

• Clearly define job, excellent and accurate position descriptions
• Interview well – Ask in-depth job-related questions
• Check references – believe what you hear; external/internal
• **Background checks** – for security, cash, minors, systems; MUST be in announcement;
OAR 580-023-0111
Definitions

(5) "Subject individual" means a person from whom the Chancellor's Office or OUS institution may require criminal records checks as a condition to provide services as a contractor, employee, or volunteer. Subject individuals include persons currently serving as a contractor, employee, or volunteer, or persons who seek appointment as an employee, volunteer, or engagement as a contractor to a position that is designated as a critical or security-sensitive position. The categories of critical or security-sensitive positions for which the Chancellor's Office and OUS institutions may conduct criminal records checks include those in which the person:

(a) Has direct access to persons under 18 years of age or to student residence facilities because the person’s work duties require the person to be present in the residence facility;
(b) Is providing information technology services and has control over, or access to, information technology systems that would allow the person to harm the information technology systems or the information contained in the systems;
(c) Has access to information, the disclosure of which is prohibited by state or federal laws, rules or regulations or information that is defined as confidential under state or federal laws, rules or regulations;
(d) Has access to property where chemicals, hazardous materials and other items controlled by state or federal laws or regulations are located;
(e) Has access to laboratories, nuclear facilities or utility plants to which access is restricted in order to protect the health or safety of the public;
(f) Has fiscal, financial aid, payroll or purchasing responsibilities as one of the person’s primary responsibilities; or
(g) Has access to personal information about employees or members of the public including Social Security numbers, dates of birth, driver license numbers, medical information, personal financial information or criminal background information.
Hiring

• **Letters of Offer** – signed/delivered to HR PRIOR to first day; pay doc and legal requirement (notice, OARs, IP, etc.)
  – AAUP: 30 days prior to first class Art 18 Sec 2(d)
  – AFT/Adjunct: 5 weeks prior to first class Art 8 Sec 1
Hiring

Legal requirements on 1st day

- I-9 (Immigration Services):
  - Photo ID (Passport, SS Card)
  - Eligibility to work in U.S.

- IRS for Payroll:
  - Social Security Card
On-Boarding

- Guide new faculty and staff through a great start-up at PSU
- New Faculty Orientation in Fall
- **New Employee Briefing in HR** – 2x/mo
  - Ethics, policies, benefits, history
- Set up support systems; mentors, campus groups
- Training – See HR, BAO, OSA & IT offerings on the web
Need-to-Know Policies

• Ethics/conflict of interest
• FERPA
• Drug Free Workplace/Alcohol Use
• Consensual Relationships
• PSU Alert
• Sexual Harassment
• Professional Standards of Conduct
• HR Website – www.pdx.edu/hr
PSU’s Code of Ethics and Conflict of Interest

The **Code of Ethics** applies to you in your capacity as an employee of PSU and prohibits certain conduct:

You may not use your position in any way to obtain financial gain for yourself, a relative, or a business with which you or a relative is associated.

You may not use confidential information received because of your position for private gain.

Consistent with the provisions of ORS 244.025 (Oregon Revised Statutes Government Ethics Laws),

- Public officials (including relatives and members of the household) may receive NO gifts of entertainment from persons with a legislative or administrative interest unless the entertainment is “incidental” to an event or the entertainment is “ceremonial.”

The yearly gift limit from a “single source” with a legislative or administrative interest is $50.
FERPA

What is FERPA?

The Family Educational Rights and Privacy Act of 1974, as amended, is a Federal law that governs the confidentiality of student records.

Why must Portland State comply with FERPA regulations?

FERPA applies to all schools that receive funding under most programs administered by the Secretary of Education.
Care and Release of Student Records

As guardians of student records, faculty and staff may not release protected student information to any outside party, including parents of minors.

The following is considered strictly confidential at all times:
- Student identification numbers or Social Security numbers
- Age, race, gender, national origin, religious affiliation
- Exam or course grades
- Class schedule
- Financial, medical, or public safety records

For more information contact the Office of Admissions and Records at 503-725-3444. If an emergency arises, contact Campus Public Safety at 503-725-4404.
Drug Free Workplace Policy

Portland State University is committed to maintain a drug-free workplace; the unlawful manufacture, distribution, dispensing, possession or use of controlled substances by university employees in the workplace is prohibited. All employees of the University, including employed students, must abide by this policy.
Consensual Relationships

PSU recognizes that two consenting adults should be free to conduct a personal relationship if they so wish.

In cases of power differential—requirement to report to next level supervisor.

With AAEO arrangements made to objectively supervise employee or student through a third party.
PSU Alert System

Emergency notifications to phone, cell phone, e-mail, or pager

To provide the campus community with a safe and secure experience

Join PSU Alert!

Use your PSU account at www.banweb.pdx.edu or visit www.pdx.edu/psualert
PSUAlert - Emergency Notification Network

Incident Types:
- Weather
- Traffic
- Crime

PSU Official enters the alert
Alert Network Server

Wireless Carriers
ISP Data Centers

The message is sent to various relay points for delivery.

Alert is delivered to landlines, cellular phones, and through email.
School Closures

Check PSU home page [www.pdx.edu]
Call (503)-725-7000, enter your ext. # and password from any location to check your messages. In cases of school closures a broadcast message will be placed on your voice mail as early as possible.

Be sure your phone number is placed in the on-line directory. You have the option to do this when you originate your Banner account.

Tune-in to TV and radio news
General University number (503-725-3000).
Sexual Harassment is Prohibited

PSU administration, faculty, staff, and students are responsible for assuring that PSU maintains an environment for work, study, and the provisions of services and activities that is free from sexual harassment.

Sexual Harassment is...

Any unwelcome and unwanted advance or request for sexual favor or other verbal or physical conduct of a sexual nature when:

Such conduct is made a term or condition of an individual’s status

Such conduct is used either as a basis for any decision affecting terms or conditions of an individual’s status

Such conduct has the effect of unreasonably interfering with an individual’s work, receipt of services, or creates an intimidating, hostile, or offensive environment
Reporting Sexual Harassment

PSU encourages anyone who believes that s/he has experienced or witnessed sexual harassment to come forward promptly by informing:

- The alleged harasser
- A supervisor or department head most directly concerned
- Any academic or administrative official
- Office of Affirmative Action
- Office of Student Affairs
- Office of Academic Affairs
- Human Resources Department
- Members of the Sexual Harassment Resource Network
Professional Standards of Conduct

It is the goal of PSU to maintain a safe, respectful and productive environment for everyone, and strives to create a climate that values and supports:

- The healthy and productive exchange of ideas, beliefs, and practices;
- Treating everyone with respect, courtesy and appreciation;
- An atmosphere of tolerance where a diverse population can live and work with professionalism and dignity;
- The open and respectful handling of legitimate disagreements.

Harassing, threatening or violent behavior is prohibited.
Retaliation is prohibited.
Report to Department Chair/Supervisor, HR, OSA, AAE0, OAA, PO.
Payroll: On Time & On-Line

• Department Chairs/Supervisors are responsible for “personnel” activities including pay processing

• On-Time – meet payroll deadlines
  – 10th – all app’t letters, salary changes, signed rosters, everything except
  – 16th – hourly time sheets

• Tips: www.pdx.edu/hr/timesheets
Payroll: On Time & On-Line

- On-Line – PSU is shifting to automated systems...paper not OK!
  - OIT, Salem Center, Financial Aid
  - All student hourly and classified hourly
  - HR is rolling out...call:
    - Jennifer at 5-5090
    - Vui at 5-3755
Payroll: Know Your Team

- Know FLSA status of all your employees
  - Hourly/salaried
  - 9 mo/12 mo
  - SEIU, AAUP, AFT, UnUn, UnEx
- AAUP Academic Professionals
  - Treat as salaried, exempt employees
  - Give flexibility for travel & evening work
  - Offer flex schedules—call HR
Family & Medical Leave Act (FMLA) 
Oregon Family Leave Act (OFLA)

- Up to 12 weeks for qualified ees
  - Own serious health condition
  - Serious health condition of immediate family
  - Parental leave – care of newborn, placed or adopted child
  - New! Military Caregiver Leave/Qualifying Exigency Leave/Crime Victims Leave

- Unlawful to deny or discriminate if certified and approved
FMLA /OFLA

• Entitlement:
  – All core benefits paid by PSU
  – Under FMLA & OFLA ee reinstated to position
• Use paid leave accruals (sick & vacation)
• Unlawful to deny or discriminate if certified and approved
FMLA /OFLA

• No magic words -- if ees say they need time off for medical or family reasons—immediately direct them to call HR
  – Kristin Smith, Leaves Manager
  – 5-9686
  – ksmith@pdx.edu

• Dep’t Chair should call to learn role and legal boundaries
Minimum Wage

Effective January 1, 2010
• From $8.40 to $8.50
• HR will send an announcement
• Affects students and wage agreements
Performance Management

- Classified: 6-mo trial service (3-mo review)
- Classified: review on anniversary date
- UnUN & UnEx – April 30 each year
- AAUP/Acad Professionals: May each yr
- AAUP/Fixed Term: annually during yrs 1-6, every 3 years after year 6
- AFT/Adjunct: reviewed once every 6 terms worked and by request
COBRA

• New OUS financial statement reporting
  – Nearly eliminates PSU’s ability to pay COBRA during leaves of absence or after separation
• Do NOT make “COBRA promises” to faculty/staff
Separation

- **Inform HR** – Banner will continue to pay until end of the contract date causing overpayments
- BOLI - legal obligations for final pay on time
- HRC website “Separating Employee”
  - Resignation letter
  - Employee Status Change Form
  - Adjunct Cancellation Form
  - Email
- Exit Checklist for Supervisors/Dept Chairs
  - **Return of keys, procurement cards, equipment, security access cards;**
  - computer account deletion HRC website
Stressful Times

- Economy, Unemployment, State budget climate
- Employees, spouses, partners
- Tips:
  - Listen, look for signs, be available, reach out
  - EAP
    - Website: www.MyRBH.com
    - Access code: psu
    - Supervisor Consultation 866-750-1327
  - HR
    - Loretta, Leila, Maria, Cathy...5-4926
Questions & Answers
Policies & Procedures

Policies:
- [http://www.pdx.edu/bao](http://www.pdx.edu/bao)

Forms:
- [http://www.pdx.edu/media/b/a/BAO_forms.html](http://www.pdx.edu/media/b/a/BAO_forms.html)
- E-mail: [sasap@pdx.edu](mailto:sasap@pdx.edu)
- Phone Numbers:
  - [http://www.pdx.edu/media/b/a/BAO_phone_list.pdf](http://www.pdx.edu/media/b/a/BAO_phone_list.pdf)
  - [http://www.pdx.edu//media/b/a/BAO_Contacts.pdf](http://www.pdx.edu//media/b/a/BAO_Contacts.pdf)
Conference Attendance

When requesting reimbursement for conference expenses attach a brochure showing...

- Date & Location of conference
- Agenda
- Meals provided
- Lodging rates/host hotel(s)

Original Itemized Receipt for Lodging

- Occupant’s Name
- Room number
- Dates of stay
- Number of persons occupying the room
- Room rate
- Lodging taxes
- Actual amount and how it was paid
Mileage & Meals

**Private Auto Miles** (personal vehicle only)
- Driver registration form must be on file with BAO travel office before claiming mileage reimbursement
- Indicate actual odometer reading or print out mapquest mileage from official work station to destination. Miles in excess of OUS mileage chart will need justification

**Meals**
- Reimbursement dependent upon departure & return times as indicated on the itinerary
- Actual costs cannot exceed allowable per diem rate
Rental Vehicles

Renting Vehicles:

• Purchase Limited Damage Waiver (LDW) coverage, also known as CDW UNLESS you are using your corporate travel credit card or the state’s contract with Enterprise Rent-a-Car (46OR007-ORE)

• This is crucial as the deductible doubles from $2,500 to $5,000 when LDW insurance was available but was not purchased!

Relocation/Moving:

• Allowed If the 50 mile test has been met!

• Please call Travel Desk @ 5-3733 for more information

• Moving allowance MUST be stated in letter of offer!