UIC UNIVERSITY OF ILLINOIS AT CHICAGO

UIC FORUM
April 14, 2016

2016 BRINGING ADMINISTRATORS TOGETHER CONFERENCE

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ABOUT THE CONFERENCE

Target Audience

The target audience for this conference is UIC academic fiscal officers and school/college/department administrators with high-level research, human resources, and business and finance responsibilities.

Mission

This professional development conference will strive to provide the target audience with knowledge, resources, and networking opportunities to enable them to manage the challenges they face and to pursue excellence in their roles at the University. The conference planning team defines professional excellence as:

- being proactive through forecasting and planning versus being reactive;
- being open to different ways of doing business and developing creative solutions to business problems;
- breaking down silos and establishing connections across disciplines;
- seeing the big picture and understanding one's contribution to it;
- networking and collaborating both within one's department, as well as with other departments and units;
- actively developing one's professional career and the careers of staff members;
- having a firm understanding of the UIC environment by being aware of changes that significantly impact the University and implementing goals that support the UIC strategic plan.

Goals

The primary goals of the conference include the following:

- to facilitate the sharing of best practices, new knowledge, tips, and tools that are relevant to this target audience and that can be passed down to their staff;
- to provide a forum for this target audience to share problems and concerns and develop possible solutions for some of the most challenging issues they face;
- to encourage networking and collaboration across units, departments, and schools/colleges;
- to recognize the importance of the work being done by this group of administrators and foster a greater sense of purpose and camaraderie.

Conference Sponsors

- Michael Amiridis, Chancellor
- Susan Poser, Provost and Vice Chancellor for Academic Affairs
- Robert Barish, Vice Chancellor for Health Affairs
- Mitra Dutta, Vice Chancellor for Research
- Michael Ginsburg, Interim Associate Vice Chancellor for Human Resources
- Vanessa Peoples, Interim Assistant Vice President for Business and Finance

Conference Planning Team

- Mary Malcolm, OBFS, Associate Director for Training and Communications
- Bernadette Rossmoore, OBFS, Coordinator of Business and Financial Services

REGISTRATION

Please contact the Conference Planning Team at uicadconf9@uillinois.edu with registration questions.

DIRECTIONS

The UIC Forum is located at **725 West Roosevelt Road** (on the corner of Roosevelt Road and Halsted Street). The main entrance to the building faces Halsted.

Driving Directions

From the south: Take the Dan Ryan Expressway (I-94 W). Take Exit 52B toward Roosevelt Road/Taylor Street. Stay straight to go onto Ruble Street. Turn left onto West Roosevelt Road.

From the north: Take the Kennedy Expressway (I-90 E). Take the Taylor Street exit 52A toward Roosevelt Road. Stay straight to go onto South Union Avenue. Turn right onto Roosevelt Road.

From the east: US – 41S/Edens Expressway becomes I-94 E. Merge onto I-90 E/I-94 E. Take the Taylor Street exit 52A toward Roosevelt Road. Stay straight to go onto South Union Avenue. Turn right on Roosevelt Road.

From the west: Take the Eisenhower Expressway (I-290 E). Take the Ryan Expy/I-90 E/I-94 E exit toward Indiana. Take the Taylor Street exit 52A toward Roosevelt Road. Stay straight to go onto South Union Avenue. Turn right on Roosevelt Road.
http://fimweb.fim.uic.edu/Images/Maps/Visitor%20East%20Side.pdf

Parking

The main parking lot for the UIC Forum is Lot 5C (located at 1135 South Morgan St. on the corner of Morgan & Roosevelt). In order to receive free relocation, you will need to present your current parking hang tag to the cashier upon exit. For those who do not have a valid UIC parking assignment, there will be a fee to park. There is also a pay lot on Maxwell Street (MSPS). See map for details:

Public Transportation

The closest public transportation options are the following CTA buses (which can be taken to Blue, Green, Orange or Red 'L' lines), the Intracampus Shuttle, and the Halsted Street Metra Station:

North-South HALSTED BUS #8, Roosevelt Stop:
http://www.transitchicago.com/riding_cta/busroute.aspx?RouteId=167

- Southbound Halsted Bus #8 stops just south of the UIC Forum (Halsted & Roosevelt)
- Northbound Halsted Bus #8 stops just north of the UIC Forum (Halsted & Roosevelt)

East-West ROOSEVELT BUS #12, Halsted
Stop: http://www.transitchicago.com/riding_cta/busroute.aspx?RouteId=173

- Eastbound Roosevelt Bus #12 stops just east of Halsted, right in front of the UIC Forum
- Westbound Roosevelt Bus #12 stops just east of Halsted, across the street from the UIC Forum

Eastbound 16th-18th BUS #18, Halsted Stop:
http://www.transitchicago.com/riding_cta/busroute.aspx?RouteId=177

- Eastbound 16th-18th Bus #18 stops just east of Halsted, right in front of the UIC Forum

Intracampus Bus Service:
https://fmweb.fm.uic.edu/Trans/intracampus.aspx

- Stops on Halsted between Taylor and Roosevelt.

Halsted Street Metra Station (on Halsted between 15th & 16th streets): https://metrarail.com/maps-schedules/train-lines/BNSF/stations/HALSTED

For more information, please visit:

UIC Campus map:
http://maps.uic.edu/

UIC Forum website:
http://www.uic.edu/depts/uicforum/directions.shtml

Chicago Transit Authority website:
http://www.transitchicago.com/

Metra
http://metrarail.com/metra/en/home.html

PROGRAM SCHEDULE – THURSDAY, APRIL 14, 2016

8:00 am – 9:00 am	**Registration (Lobby) / Breakfast (Main Hall AB)**
9:00 am – 10:00 am	**Welcome**: Vanessa Peoples, Interim Assistant Vice President for Business and Finance, Office of Business and Financial Services **Speaker**: Michael Amiridis, Chancellor
10:00 am – 10:15 am	**Break**
10:15 am – 11:15 am	Workshop Breakout Session 1 • Report Retrieval Options: View Direct, EDDIE, Business Objects, PI Portal, My-UI-Financials **(Room D)** • Conflict in the Workplace **(Room E)** • It's Not What You Do, It's What You Can Prove: Trends in Post-Award Research Administration **(Room F)** • Internal Controls and Fraud Prevention **(Room G)** • Legal Aspects of Contracting **(Room H)** • START myDisclosures **(Room I)**
11:15 am – 11:30 am	**Break**
11:30 am – 12:30 pm	Workshop Breakout Session 2 • Banner Finance Tips and Resources **(Room D)** • Big Questions, Big Data, and Big Answers **(Room E)** • START myResearch and PI Portal **(Room F)** • Title IX: Understanding Reporting Requirements, Rights and Resources **(Room G)** • All About Contracts at UIC **(Room H)**
12:30 pm – 1:30 pm	**Lunch (Main Hall AB)** **Speaker**: Susan Poser, Provost and Vice Chancellor for Academic Affairs **Speaker**: Robert Barish, MD, Vice Chancellor for Health Affairs
1:30 pm – 2:30 pm	Workshop Breakout Session 3 • The Bermuda Triangle of Leaves: Family and Medical Leave **(Room D)** • Dimensions of Business Decisions at UIC **(Room E)** • Purchasing-to-Payment Overview: **Part 1 (Room F)** • Report Retrieval Options: View Direct, EDDIE, Business Objects, PI Portal, My-UI-Financials **(Room G)** • Office of Research Services: Facts, Forms, and the Future **(Room H)** • Navigating the Fund Type Jungle **(Room I)**

PROGRAM SCHEDULE (Cont.)	
2:30 pm – 3:15 pm	Ask The Experts **/ Break (Main Hall AB)**
3:15 pm – 4:15 pm	Workshop Breakout Session 4 • HR Reporting: Where to Find Useful HR Reports **(Room D)** • Academic Unit Budget Resources and Allocation: Panel Discussion **(Room E)** • Purchasing-to-Payment Overview: **Part 2 (Room F)** • Reporting with Web Intelligence **(Room G)** • The Brain at Work: Conversations That Drive Positive Change **(Room H)** • An Update on the Clinical Trials Office and UIC / WIRB Review **(Room I)**

WORKSHOP DESCRIPTIONS

Workshop Breakout Session One: 10:15 am – 11:15 am

Report Retrieval Options: View Direct, EDDIE, Business Objects, PI Portal, My-UI-Financials – Room D

Presenters:

- **Sherri Faith**, Associate Director, University Accounting and Financial Reporting
- **Jerry Myers**, Functional Area Coordinator for Finance, Administrative Information Technology Services

Description:

Are you overwhelmed by the many options for getting the data you need? Are you confused about when to use View Direct, EDDIE, the PI Portal, My-UI-Financials or when to write your own report? This presentation will detail the different reporting and data options available to you and highlight when you would use each one.

Learning Objectives:

- Identify the different reporting and data tools available
- Determine when and why to use each option

Conflict in the Workplace – Room E

Presenter:

Kathy Irving, Assistant Equal Opportunity Officer, Office for Access and Equity

Description:

Conflict is inevitable and almost everywhere these days, but it does not have to result in negative consequences! This presentation addresses typical conflicts that may arise in the workplace and explores strategies for dealing with them.

Learning Objectives:

- Explore and identify sources of conflict
- Identify conflict styles
- Receive practical tips and techniques for managing conflict

It’s Not What You Do, It’s What You Can Prove: Trends in Post-Award Research Administration – Room F

Presenters:

- **Mee Mee Lee-Choi**, Interim Senior Associate Director, Office of Grants & Contracts
- **Katrina Lopez**, Interim Assistant Director of Compliance, Office of Grants & Contracts
- **Brian Shim**, Assistant to the Head for Finance, Department of Physics

Description:

This presentation will highlight current trends in post-award research administration that have recently been subject to increased scrutiny, including after-the-fact review of expenditures, departmental billings, cost sharing, and effort reporting. This interactive presentation will focus on sharing lessons learned and identifying best practices for managing these complex tasks and improving departmental internal controls.

Learning Objectives:

- Describe best practices for managing after-the-fact review of expenditures, departmental billings, cost sharing, and effort reporting
- Avoid common mistakes in processing and documenting after-the-fact expenditure reviews, departmental billings, cost sharing, and effort reporting
- Identify resources and tools to assist with managing these complex topics

Internal Controls and Fraud Prevention – Room G

Presenters:

- **Neal Crowley**, Director of Internal Audits
- **Herminio Morelos**, Assistant Dean for Business, Finance, and Human Resources, College of Nursing
- **Kunal Vora**, Director and Assistant to the Head for Business and Operations, Department of Radiology / Interim Director of Administrative Operations, Department of Pediatrics

Description:

During this presentation, there will be a discussion of the importance of creating an adequate control environment and fraud awareness with case studies of control breakdowns. Examples of fraud cases with business manager and academic fiscal officer insight will be provided.

Learning Objectives:

- Review Internal control concepts
- Identify tips for success in creating a successful control environment
- Create a fraud prevention plan

Legal Aspects of Contracting – Room H

Presenters:

- **John Alsterda**, Assistant Campus Legal Counsel, Office of University Counsel
- **Chris Limperis**, Assistant University Counsel, Office of University Counsel
- **Michael Melendez**, Associate University Counsel, Office of University Counsel
- **Megan Stoll**, Legal Fellow, Office of University Counsel

Description:

During this panel discussion, you will learn from a group of experienced University attorneys about key legal issues that impact contracts for the purchases of goods and services and revenue-generating agreements. Included will be an overview of some of the central points to remember for healthcare-related agreements. There will be a question-and-answer period near the end of the presentation.

Learning Objectives:

- Identify key legal issues that impact contracts generally
- Review key legal issues unique to health-care related agreements

START myDisclosures – Room I

Presenters:

- **Jacquelyn Jancius**, Director, Conflict of Interest, Vice Chancellor for Research
- **Sean Ireland**, Enterprise Systems Specialist, Administrative Information Technology Services

Description:

START myDisclosures is an online disclosure reporting tool used by the University of Illinois academic staff to seek approval for and disclosure of potential conflicts and outside activities or interest. In the fall of 2015, University of Illinois employees started to use START myDisclosures to submit their Reports of Non-University Activities (RNUAs). The presentation is intended to provide business managers and research coordinators with an update on the START myDisclosures online application for the Report of Non-University Activities, the Significant Financial Interest (SFI) disclosure and management required for sponsored research projects, and the Financial Conflict of Interest (FCOI) Checklist. The FCOI Checklist and SFI disclosure along with management tools in the application are under development and expected to be released in the Summer of 2016. Improvements for the RNUA application tools are expected to be released for the next academic year. This presentation will give business managers and research coordinators early access to view and learn about the tools and provide opportunities for input. There will be a demonstration of START myDisclosures.

Learning Objectives:

- Review the overall objective, scope, and roadmap of START myDisclosures
- Discover the upcoming changes and functions for START myDisclosure online conflict of interest disclosure and management tools

- Determine how investigators will use START myDisclosures for conflict of interest disclosure and management required for sponsored research projects
- Identify the functions and features for business managers and research coordinators

Workshop Breakout Session Two: 11:30 am – 12:30 pm

Banner Finance Tips and Resources – Room D

Presenters:

- **Jason Bane**, Senior Business and Financial Coordinator, University Accounting and Financial Reporting
- **Sha'Ron Pruitt**, Assistant Director of Finance and Administration, School of Public Health

Description: Learn how to use Banner Finance to get maximum results! We'll decode the crazy Banner form names, show which Banner forms to use for different processes, and discover shortcuts and tips to use Banner for searches and so much more!

Learning Objectives:

- Use Banner Finance more efficiently using shortcuts and tips provided
- Identify the correct Banner form to use for different processes
- Locate available resources

Big Questions, Big Data, and Big Answers – Room E

Presenters:

- **Marissa King**, Assistant Director, Budget and Resource Planning, Rockford Regional Pharmacy Program
- **Eric McMinoway**, Business Associate, College of Nursing
- **Herminio Morelos**, Assistant Dean for Business, Finance, and Human Resources, College of Nursing
- **Dale Rush**, Associate Dean for Administrative Affairs, College of Pharmacy
- **Todd Van Neck**, Associate Dean for Administration, College of Medicine
- **Phoenix Wan**, Director of Decision Support, College of Medicine
- **Brian Weaver**, Business Administrative Associate, College of Nursing

Description: Three colleges (Medicine, Pharmacy, and Nursing) will present their different processes, tools, and solutions for managing a large, complex academic entity. What are the big questions, how do you take data from a variety of sources and turn it into information, and how do you begin to disseminate that information to the various audiences/constituencies?

Learning Objectives:

- Determine what the big questions are – identifying desired outcomes or goals, analyzing the information, and determining whether the goals are being met
- Discuss the challenges and pitfalls of working with university and other big data
- Explain multiple tools and approaches to analyzing big data
- Describe how to share the information – what tools to use, who the audience is/should be, what information is most relevant to them and in what format that information is most easily consumed

START myResearch and PI Portal – Room F

Presenters:

- **Jennifer Rowan**, Executive Director, Research Administration and Operations, Vice Chancellor for Research
- **Jacqueline Berger**, Director, Research Communications and External Affairs, Vice Chancellor for Research
- **Sean Ireland**, Enterprise Systems Specialist, Administrative Information Technology Services

Description:

START myResearch is the Principal Investigator (PI) portal that integrates and displays information from a number of different university systems, giving faculty and their business managers access to all proposal data and summary financial data. The goal is to minimize the administrative burdens of managing faculty research in order to increase productivity and the value of the University's portfolio. START myResearch was first released in the Spring of 2014 and it is currently going through a significant upgrade to improve usability. There will be a demonstration.

Learning Objectives:

- Review the overall objective, scope, and roadmap of the START myResearch
- Identify enhancements expected in 2016:
    a. All new design and layout
    b. Improved navigation ability across document types (proposal, award, subaward, etc.)
    c. Ability to search and filter based on document types (proposal, award, etc.), Investigator, department, and document criteria (title, award number)
    d. Ability to view up-to-date status of all negotiations and all associated attachments

Title IX: Understanding Reporting Requirements, Rights and Resources – Room G

Presenter: **Rebecca Gordon, EdD**, Title IX Coordinator, Office for Access and Equity

Description: In the ever changing landscape of compliance, this presentation will provide an overview of the new state and federal mandates around our response to sexual violence/harassment. Employees have a new role in mandated reporting of Title IX related disclosures about sexual misconduct. This presentation will review employee reporting obligations, prevention training, resources on campus, and the Title IX response.

Learning Objectives:

- Define Title IX reporting obligations
- Identify confidential and other available resources
- Determine what to expect when a report is made to the Title IX Coordinator

All About Contracts at UIC – Room H

Presenters:

- **Debra D. Matlock**, UIC Director of Purchasing
- **Patricia G. Menguito**, Associate Director, Office of Business Development Services
- **Patricia Pfister, JD, CRA**, Associate Director, Sponsored Projects (Research Contracts), Office of Research Services
- **Bruce Walden**, Director, Real Estate Planning and Services

Description: You find that you need a contract or are given a contract but are not sure what to do with it. Where do you send it? Who can sign it? Join us and find out at this presentation! Meet the directors and associate directors of the contracting offices at the Chicago campus – Purchasing, Business Development Services, Research Services, and Real Estate.

Learning Objectives:

- Identify the types of contracts available and needed for your situation
- Determine the UIC contracting office to where your contract should be directed
- Define the form(s) and approvals needed when sending your contract for processing

Workshop Breakout Session Three: 1:30 pm – 2:30 pm

The Bermuda Triangle of Leaves: Family and Medical Leave (Room D)

Presenters:

- **Arwa Naji**, Human Resources Associate, UIC Human Resources
- **Shelissa Rodriguez**, Human Resources Manager, UIC Human Resources

Description:

Have you ever felt unsure of the steps you needed to take when an employee requested Family and Medical Leave (FML)? Do you know who should be requesting/receiving forms from an employee? What does University policy allow with FML? How does one manage intermittent FML? What about long-term disability leave? The Family and Medical Leave Act is an extensive and often confusing law. Is it any wonder you find yourself second-guessing your decisions? During this presentation, we will help clarify the "gray areas" of FML including: the general process of who handles the various steps of administering the leave, determining eligibility, how current University-based leaves interlace with FML, inclusivity of SURS disability, managing FML with current department operations and more!

Learning Objectives:

- Define the roles of the unit HR representative, supervisor and the employee (FML, Shared Benefits, SURS Disability)
- Explain University policy and procedure of the federal guidelines
- Manage FML within unit operations

Dimensions of Business Decisions at UIC (Room E)

Presenter:

Vanessa Peoples, Interim Assistant Vice President for Business and Finance, Office of Business and Financial Services

Description:

Using real UIC case studies, we will explore decision-making frameworks used when addressing challenging issues within our complex environment. Balancing institutional policy and procedures, state and federal regulations and statutes, with the needs and interests of various stakeholders, requires a multi-dimensional perspective when engaging in business matters on a daily basis.

Learning Objectives:

- Explore real life examples of complex issues that we face on a daily basis and gain insight as to how these issues are addressed and resolved
- Build an understanding of the involvement of various campus and University Administration offices in addressing issues
- Become familiar with various government regulations and Office of Business and Financial Services policies that inform the decision-making process

Purchasing-to-Payment Overview: Part 1 (Room F)

Presenters:

- **Debra D. Matlock, JD** - Director, UIC Purchasing
- **Aaron Rosenthal**, Assistant Director of Contracts and Systems, UIC Purchasing
- **Melissa Plotner**, Assistant Director for Payment Operations, University Payables

Description:

This two-session presentation by UIC Purchasing and University Payables staff members will cover the “req to check” process. **Part 1** will focus on the Purchasing side of the process - from requisition to purchase order. Presenters will demystify the purchasing process and provide tips and best practices for effectively navigating competitive solicitations (bids and RFPs), exceptions and exemptions, and contract processes. **Part 2** will be an overview of invoice processing, vendor payment procedures, Travel Expense Management (TEM) tips, how to avoid non-compliance issues, and where to find helpful resources.
Please also attend the Purchasing-to-Payment Overview: Part 2 - Session 4.

Learning Objectives:

- Describe the core steps for UIC procurements, from requisition to contract
- Share best practices for navigating the purchasing processes in an efficient and effective manner to get to payment to our vendors

Report Retrieval Options: View Direct, EDDIE, Business Objects, PI Portal, My-UI-Financials (Room G)

Presenters:

- **Sherri Faith**, Associate Director, University Accounting and Financial Reporting
- **Jerry Myers**, Functional Area Coordinator for Finance, Administrative Information Technology Services

Description:

Are you overwhelmed by the many options for getting the data you need? Are you confused about when to use View Direct, EDDIE, the PI Portal, My-UI-Financials or when to write your own report? This presentation will detail the different reporting and data options available to you and highlight when you would use each one.

Learning Objectives:

- Identify the different reporting and data tools available
- Determine when and why to use each option

Office of Research Services: Facts, Forms, and the Future (Room H)

Presenters:

- **Michael Anderson**, Interim Senior Sponsored Projects Specialist (Proposals), OVCR Office of Research Services
- **Elizabeth Cruz-Garcia**, Sponsored Projects Specialist (Contracts), OVCR Office of Research Services
- **Michael Isaac**, Interim Senior Sponsored Projects Specialist (Proposals), OVCR Office of Research Services
- **Juan Tamparillas**, Sponsored Projects Specialist (Contracts), OVCR Office of Research Services

Description:

The Office of Research Services (ORS) works in tandem with department business managers on all pre-award and non-financial post-award activities – from proposal development and submission to just-in-time - award acceptance, compliance assurance and closeout – on all campus sponsored projects. Join staff from ORS as they present information on: 1) two new electronic systems, ORSWeb and KC (Kuali Coeus), that will assist with proposal submission and information retention; 2) an overview of the contracts process including types of contracts, review, compliance, approvals, and execution; and 3) a review of the most common no-budget agreements (MTAs, CDAs and DUAs) including their particularities and the process they follow.

Learning Objectives:

- Receive an introduction to ORSWeb – new web based program for submitting documents to ORS
- Receive an introduction to Kuali Coeus – new grants management system
- Summarize the contracts process including types of contracts, review, compliance and sticking points
- Identify no-budget agreements including compliance verification and negotiation

Navigating the Fund Type Jungle (Room I)

Presenters:

- **Jason Bane**, Senior Business and Financial Coordinator, University Accounting and Financial Reporting
- **Tim Parrish**, Financial Accounting and Reporting Analyst, University Accounting and Financial Reporting

Description:

Have you ever wondered why the University has so many fund types? Have you been wondering how you can use each of the fund types in your unit? Are you familiar with all of the reference materials and resources that are available? This presentation will describe the major Banner fund types at a high level, explain how each can be used within your department, and will give a brief overview of available reference materials and training opportunities.

Learning Objectives:

- Explain the principles of fund accounting
- Discover how to best use the different funds that you have available
- Identify available resources and training opportunities

ASK THE EXPERTS

Session time: 2:30 pm – 3:15 pm

The “Ask The Experts” session will provide you with opportunities to meet in person with subject matter experts from various UIC and University Administration units to learn more about the unit, to get your questions answered, to share concerns and ideas, or to simply meet those with whom you normally communicate via phone and email. It is an unstructured session and you can visit as many tables as you want. Refreshments will be available. Topics and experts are listed below.

Table Numbers and Names	Experts
1 - Access and Equity	**Keana Galloway**, Associate Director
2 - Accounting and Financial Reporting	**Brent Rasmus**, Director, University Accounting Services **John Laroe**, Associate Director, University Accounting Services **Ron Miner**, Director, Accounting Consulting **Jason Bane**, Senior Business and Financial Coordinator **Tim Parrish**, Financial Accounting & Reporting Analyst
3 - Budgeting	**Mary Ellen Korman**, Associate Director, UIC Office of Budgeting and Program Analysis **Thomas Warfield**, Associate Director, UIC Office of Budgeting and Program Analysis **Michael Moss**, Director, OBFS Budget Operations and Financial Analysis
4 - Business Development Services	**Patricia Menguito**, Associate Director **Rosetta Ballard Houston**, Business Administrative Associate
5 - Business Process Improvement	**Marc Carlton**, Assistant Director, Project Management, AITS **Rona L. M. Dealy**, Process Improvement Facilitator, Office of the Chief Information Officer

Table Numbers and Names	Experts
6 - Electronic Content Management: Reduce or Eliminate Paper from Your Workflow	**Gerard Catrambone**, Director, Office of Publications Services and Members of Gordon Flesch Company
7 - Equipment Management	**Jeff Weaver**, Senior Associate Director, Accounting and Financial Reporting (AFR) **Janet Ayers**, Accountant (AFR) **Marti Conrad**, Financial Accounting & Reporting Analyst, AFR **Cheryl Dodge**, Account Technician, AFR
8 - Facilities Management	**Clarence Bridges**, Executive Director, Operations and Maintenance
9 - Faculty Affairs	**Angela Yudt**, Associate Vice Provost
10 - Grants and Contracts Office	**Karen McCormack**, Director **Etzer Cantave**, Assistant Director **Katrina Lopez**, Assistant Director **Katina Shepherd**, Assistant Director **Tiara Kimp**, Sponsored Awards Coordinator
11 - Human Resources	**Susan Balmes**, HR Associate **Joanna Wolek**, HR Associate
12 - Institutional Research - BPA	**William Hayward**, Associate Vice Provost and Director **Stephanie Estrada**, Associate Director
13 - Internal Audit	**Neal Crowley**, Director, Internal Audit **Lea Fox**, Enterprise-wide Auditor **Jeff Mina**, Enterprise-wide Auditor
14 - My-UI-Financials	**Gloria Keeley**, Assistant Vice President OBFS Business Solutions and Support

15 - Payables	**Susie Baker**, Associate Director for Payment Operations **Melissa Plotner**, Assistant Director for Payment Operations
16 - Payroll and Benefits	**Melvin Fason**, Assistant Manager **Scot Flink**, Payroll Manager **Ruth Marquez**, Assistant Manager
17 - Procurement Diversity	**Sharla Roberts**, Director **Dale Morrison**, Supplier Diversity Coordinator
18 - Purchasing	**Debra D. Matlock**, Director **Kevin Fair**, Associate Director **John Meehan**, Assistant Director **Ruth Rios**, Assistant Director **Aaron Rosenthal**, Assistant Director **Arlene Shorter**, Assistant Director
19 - Real Estate Services	**Daniel Martin**, Assistant Director **Gina Galante**, Real Estate Specialist
20 - Receivables and Cashier Operations	**John Hockersmith**, Associate Director, Student Financial Services and Cashier Operations
21 - Records and Information Management Services (RIMS)	**Linnea Knapp**, Assistant Director **William Herrera**, RIMS Coordinator
22 - Reporting Subcommittee	**Colleen Kehoe**, Senior Assistant Director, OBFS Grants and Contracts Office **Mark McClellan**, Director of Business Affairs, Math, Statistics and Computer Science **Brian Shim**, Assistant to the Head, Physics **Dimuthu Tilakaratne**, Assistant Vice President for Decision Support, AITS

23 - Resources for New Business Managers	**Marietta Walton**, Executive Director, OBFS Business Solutions and Support **Scott Zalatoris**, Policy Specialist, OBFS Business Solutions and Support
24 - So You Think You Know Banner Finance and Reports?	**Sherri Faith**, Associate Director, OBFS Accounting and Financial Reporting **Mary Malcolm**, Associate Director, OBFS Business Solutions and Support
25 – Sustainability at UIC	**Cynthia Klein-Banai**, Associate Chancellor for Sustainability
26 - UIC Extended Campus	**Paul Cobia**, Director of Marketing, UIC Extended Campus
27 - Vice Chancellor for Research	**Mary Bowman**, Director, Office of Animal Care and Institutional Biosafety

WORKSHOP DESCRIPTIONS

Workshop Breakout Session Four: 3:15 pm – 4:15 pm

HR Reporting: Where to Find Useful HR Reports (Room D)

Presenter: **Ken Scott**, Manager, Human Resources Information Systems

Description: We will navigate through the HR Reporting Portal to find reports that can assist you in your HR role. We will cover reports found in the HR Reporting portal such as:

- Patient Protection and Affordable Care Act (PPACA) Hours Measurement Report
- Budget Profile Report
- HR Front End Reports
- HireTouch Reports

We also will cover how you can request access to the HR Reporting portal if needed.

Learning Objectives:

- Locate the HR reports
- Identify how to get access to the HR Reporting Portal

Academic Unit Budget Resources and Allocation: Panel Discussion (Room E)

Presenters:

- **Janet Parker**, Associate Chancellor, Budget and Resource Planning
- **Rich Alpern**, Associate Dean for Administration, College of Liberal Arts and Sciences
- **Jackie Finch**, Associate Dean of Finance and Resource Planning, School of Public Health
- **Jim Pierce**, Assistant Dean of Administration, College of Business Administration
- **Dale Rush**, Associate Dean of Administrative Affairs, College of Pharmacy
- **Todd Van Neck**, Associate Dean for Administration, College of Medicine

Description: Budget and resource allocation policies and practices associated with college level budget plans are complex and vary significantly among academic units. This presentation will feature a senior panel of campus and academic unit budget leaders who will discuss areas including funding allocation methodologies, budget cut approaches, and best practices for promoting long term unit financial stability. Specific questions will be requested from registered attendees in advance of the panel discussion and will be given top priority. Any other questions will be addressed as time permits. Come prepared to engage and learn from your peers across the academic unit spectrum.

Learning Objectives:

- Participate and share in a collaborative discussion of current academic unit budget allocation and resource issues
- Identify the ways in which budgeting practices are similar and different across campus units

Purchasing-to-Payment Overview: Part 2 (Room F)

Presenters:

- **Melissa Plotner**, Assistant Director for Payment Operations, University Payables
- **Aaron Rosenthal**, Assistant Director of Contracts and Systems, UIC Purchasing
- **Debra D. Matlock, JD** - Director, UIC Purchasing

Description:

This two-session presentation by UIC Purchasing and University Payables staff members will cover the “req to check” process. **Part 1** will focus on the Purchasing side of the process - from requisition to purchase order. Presenters will demystify the purchasing process and provide tips and best practices for effectively navigating competitive solicitations (bids and RFPs), exceptions and exemptions, and contract processes. **Part 2** will be an overview of invoice processing, vendor payment procedures, Travel Expense Management (TEM) tips, how to avoid non-compliance issues, and where to find helpful resources.
Please also attend the Purchasing-to-Payment Overview: Part 1 - Session 3.

Learning Objectives:

- Identify the structure of University Payables
- Review the high-level workflow for purchase order invoices and TEM transactions

Reporting with Web Intelligence (Room G)

Presenter:

Trish Curry, Training Specialist, Decision Support, Administrative Information Technology Services

Description:

Web Intelligence offers a user-friendly interface to create meaningful reports to answer your business questions. Learn how to use Web Intelligence to create easy ad hoc reports using data from the Enterprise Data Warehouse (EDW).

Learrning Objectives:

- Create queries
- Format reports
- Analyze data
- Share your results with others

The Brain at Work: Conversations That Drive Positive Change (Room H)

Presenter:

- **David Byers**, Associate Director for Performance Development, OBFS Business Solutions and Support

Description:

Are you tired of trying to help your staff see how to improve their work performance or to embrace new ideas or changes in the workplace? Or do you feel there must be a better way to have conversations that impact positive change? If you want dramatically different results then you need to have significantly different conversations. This presentation will provide you with an introduction to tools needed to achieve powerful improvements in your employees' performance through presenting unique and highly effective approaches to coaching and communicating.

This presentation combines the best ideas of current experts in neural science, coaching, communication and leadership with a focus on communicating in ways that best work with brain function and how people think. The presentation will provide leaders, managers and supervisors with the opportunity to learn how to have conversations that facilitate positive change in employees.

Learning Objectives:

- Discuss the effects of communication and coaching in the workplace
- Apply some foundational communication and coaching skills in your daily conversations with employees in order to facilitate positive change in their performance

An Update on the Clinical Trials Office and UIC / WIRB Review (Room I)

Presenters:

- **Diane Downs**, Associate Director, Clinical Trials Office
- **Cynthia Tom-Klebba**, Associate Director, Office for the Protection of Research Subjects

Description:

This presentation will provide information on the Clinical Trials Office (CTO), its function, and role and services provided in the administrative support of the conduct of clinical trials. We will discuss the relationship and workflow with the Office of Research Services (Contracts) and the Office for the Protection of Research Subjects (IRB). The presentation will address the harmonized review of the research-related documents incorporating the Medicare rules and regulations pertaining to drug and device clinical trials. It will also introduce the coverage analysis, which is a methodology to work with Medicare's Clinical Trial Policy and the device regulations.

Learning Objectives:

- Describe the function and role of the Clinical Trials Office
- Discuss the interrelationship between the Clinical Trials Office, the Office of Research Services (Contracts) and the Office for the Protection of Research Subjects (IRB)

- Compare and contrast the differences between the Medicare Clinical Trial Policy and the device regulations.
- Identify the purpose of the coverage analysis
- Explain the process of UIC IRB Review and WIRB Criteria for Review
- Explain the use of the Coverage Analysis in completing the UIC IRB or WIRB Review

Workshop and Conference Evaluations

Please take a few minutes after each workshop to complete the workshop evaluation. This will give the workshop presenters feedback on what was valuable to you and will identify opportunities for improvement.

During the week after the conference, you will receive an email with a link to the conference evaluation. Again, we encourage you to complete the evaluation to let us know if the conference program met your needs and fulfilled your expectations. Your comments and suggestions are very valuable to us, and we appreciate receiving your opinions.