Training Model

Purpose: To develop a training model that lists the trainings required for Business Managers/Coordinators/Specialists to assist them in effectively performing their jobs.

Assumptions

- There is a desk manual for every person’s job at the University
- Employees are aware of non-required courses they can take to improve their skills
- Employees hired in a financial related position possess the required education & skills
- Employees know which department to call for assistance
- Staff shortages will continue in the future
- Supervisor is available and has the knowledge to assist them
Facts

- Each department specializes in one area and is available to assist the campus community.
- Additional resources are available online to assist employees succeed, i.e., Accounting Handbook.
- New hire/promoted employee needs training.
- Employee has qualities that will serve in the position he/she was awarded.
- Employees learn from each other and can use one another as a resource.
- Employees have a supervisor to guide them.

Courses of Action

1. Training for Success Model
2. Continue to gather data or continue research before implementation of model.
3. Leave as is.

Course of Action – Training for Success

Create a centralized training tool that will list the recommended and required training for employees in financial related positions. This will serve as a guide for new and current employees to ensure they succeed in their positions.
Steps to complete Course of Action—Training for Success

- **Step 1:** Send out a Survey
- **Step 2:** Create a list of trainings and resources
- **Step 3:** Develop a Frequently Asked Questions (FAQ’s) document

**Step 1: Survey**

Create a questionnaire to identify problems that departments may be currently struggling with based on the questions we receive daily. (We sent it out as a survey to the Financial Users Network on Oct 25th.)

**Survey Pros & Cons**

**Pros:** We can get anonymous responses to ensure we get honest and accurate information.

**Cons:**
1. Department personnel may not be willing to share honest information for fear of retaliation;
2. They may not take time to fill it out.
Survey Memo

Greetings,

As a member of the TAMU-CC campus community, you are uniquely positioned to reflect on the quality and effectiveness of services offered by the Accounting and Budget Department and Office of Finance and Administration. Please help us to evaluate these services by participating in the following survey.

Your responses will allow us to continue to improve the quality of services provided to the campus community. Your feedback is critical to our success and will be considered for future programs. Responses are anonymous and will be reported only in the aggregate. This survey will take approximately 5 to 10 minutes to complete, and consists of questions pertaining to accounting, budget, and overall knowledge of the services offered to our departments. We hope to identify any areas that require additional training or services to ensure that we meet the needs of each department.

Please use the link below to enter the survey:
https://www.surveymonkey.com/s/201736689

If you have any questions or need any assistance with the survey, please contact:
Hilton M. dc@tamucc.edu or kathleen.mcdonald@tamucc.edu. If your link does not work, please try:
https://www.surveymonkey.com/r/201736689

Thank you in advance for your participation in this important feedback.

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Survey Topics

› Job Title
› Ability to read accounts in FAMIS or Canopy
› Training Completed in last 12 months
› Accountant Responsibilities
› Research first or call SOP's
› Do you know who your accountant is?
› Budget vs Actual
› Reconciling G/L-S/L
› Do they utilize DBR’s & DCR’s?
› Do they know how to complete a Fiscal Request & NAR?
› Year End Flags

SURVEY RESULTS
When you have a question, do you research first by using available resources, or do you reach out to a live person to get your answers?

- Research on my own: 77%
- Reach out to live person: 23%
- Other: 11%

There seems to be a correlation between those who are unaware of resources and reach out to live person for assistance.

Are you aware that the Accounting and Budget websites provide some helpful resources to assist you understand your accounts?

- Yes: 77%
- No: 23%

There seems to be a correlation between those who are unaware of resources and reach out to live person for assistance.
What are the responsibilities of the accountant assigned to your department?

- Assist with questions on various postings to your account
- Create a new account per your request
- Change the responsible person or department on your account
- Make a correcting entry on your account

These are the correct answers

What are the responsibilities of the accountant assigned to your department?

- Review your accounts for incorrect postings or insufficient funds
- Lift the flag on your account for insufficient budget
- Instruct you on how to return an overpayment on an invoice
- Advise you where to deposit a check you received
- Freeze/delete your accounts
- Instruct you what object code to use when creating a limited purchase order
- Approve your HEAF funds to roll over to next year
- Assist you with completing a Voucher Create Form
- Make budget corrections on your accounts

These are the incorrect answers

39% of responses were incorrectly classified as accountant responsibilities
Does your current position have a Standard Operating Procedure (SOP) manual?

- More than 50% of employees responded that they don’t have SOPs.
- Other comments: Creating one as they go or partial but not complete

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Step 2: Trainings & Resources

- Provide a table that lists the training & resources available to enhance the employees’ comprehension of various financial areas including: Accounting, Budget, Payroll, Accounts Payable, Accounts Receivable, and Purchasing.

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Trainings Pros & Cons

**Pros:** Helpful to identify trainings that will assist everyone with the basic or advanced training needs.

**Cons:** It’s difficult to create a generic training tool when positions may be exactly the same, but duties may vary between the two.
Pros: We can inform personnel of the various trainings held year round and meetings where we discuss updates like those at the F.U.N. group.

Cons: Personnel don’t like to spend time reading or researching for answers. They prefer to contact a live person to ask for assistance.

Step 3: FAQ

Based on the comments from the survey, we will provide a “Frequently Asked Questions” link on our website which will become an immediate guide to all personnel.

Course of Action – Continue Research

Pros: We can get a broader scope by reaching more individuals.

Cons: It’s very time consuming and we don’t have the staff and resources to continue gathering data.
Pros: Avoids interruption in the services we currently provide.
Cons: It is very time consuming and challenging for us to meet everyone’s needs. Most people who reach out are looking for an immediate answer.

Recommended Course of Action

Create a centralized training tool that will list the recommended or required trainings for employees in financial related positions.

Sample Training Model

<table>
<thead>
<tr>
<th>TAMUCC Employee Training Directory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructions: Please review the trainings required/recommended for your position.</td>
</tr>
<tr>
<td>Business Coordinator/Manager/Specialist</td>
</tr>
<tr>
<td>Cash Handling Training</td>
</tr>
<tr>
<td>Departmental Budget Request (DBR)</td>
</tr>
<tr>
<td>Departmental/revision Request (AVR)</td>
</tr>
<tr>
<td>FAMIS Access Training</td>
</tr>
<tr>
<td>FAMIS User I Training</td>
</tr>
<tr>
<td>FAMIS User II Training</td>
</tr>
<tr>
<td>Payroll EPA Creator Training</td>
</tr>
<tr>
<td>Purchasing 101</td>
</tr>
<tr>
<td>Purchasing Invoice Problem (PIP)</td>
</tr>
</tbody>
</table>

Note: Please see Appendix A for course descriptions and course numbers.

Note: Please see Appendix B for breakdown of position requirements.
Training Model–Appendix A

<table>
<thead>
<tr>
<th>Date Title from Directory Code</th>
<th>Breakdown of Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Support Specialist 0116 BUS SUPPORT SPEC I</td>
<td></td>
</tr>
<tr>
<td>0117 BUS SUPPORT SPEC II</td>
<td></td>
</tr>
</tbody>
</table>

Frequently Asked Questions

- WHAT ARE THE PURCHASE ACCEPTABLE UNITS?
- WHAT ARE THE PREFERRED SOURCES?
- CAN'T MARK UP, WHAT CAN I DO?
- CAN I CHARGE THE SAME RECIPIENT FOR MULTIPLE ITEMS IN MULTIPLE PURCHASES?
- DON'T RECEIVE INVOICE, WHAT DO I USE?
- WHAT IS THE VALUE LIMIT?
- WHAT IS THE VALUE LIMIT FOR TRAVEL?
- WHAT CAN I ORDER FROM THE ESSENTIALS?
- WHAT CAN I ORDER FROM THE ESSENTIALS?
- CAN I ORDER FROM ESSENTIALS?

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Future Recommendations

- Require that business positions have the same core competencies
- Add the training required/recommended to the Position Description Questionnaire (PDQ)
- Utilize a current Business Manager within their division or college as a mentor/coach for new Business Managers
- Require that all financial matters flow through their Business Manager/Coordinator prior to working with Accounting
- Recommend all positions have Standard Operating Procedures
- Attend EEO Orientation to introduce financial departmental staff
- Recommend training is repeated 6 months after initial completion

Any Questions?