

Business Office Updates

The Business Office staff participated in a two-day workshop intended to help identify existing issues with our current procedures and opportunities to improve our service and efficiency. The members of the Business Office staff identified the following goal and objectives:

Goal: To improve our standing within the College of Pharmacy community

Objectives:

1. To improve efficiency
2. To improve communication among the Business Office staff
3. To improve our relationships with our colleagues, aka our customers

Over the next few weeks, we'll update our job descriptions, policies/procedures, and web-page to reflect these changes. In the meantime, here is a quick guide to the changes that will be implemented immediately. You'll note our newest Administrative Assistant, Kaycee Duffey, has been included in these plans.

As you can see, our goal is to better meet your needs. That means that there are certain steps each of you can take to facilitate this process. This may take a few extra minutes on your end, but these small steps will greatly reduce the opportunity for errors or omissions, thus decreasing the time spent on backtracking and troubleshooting.

One last point I'd like to make is that for each area of responsibility, we have established a CQI process. Each Friday we will review the work completed for the prior week(s) and follow up on any issues that are outstanding or appear to be in a holding pattern on main campus.

It is our most sincere hope that these changes will result in improved response times to your requests.

Sincerely,

The Business Office Team - Brittany, Faye, Lasonya, Kaycee, and Gina

Areas of responsibility

Brittany

- Contracts
- maintain tracking sheet for contracts
- Recurring check requests to vendors
- Salary recovery
- Reconcile general fund accounts

Lasonya

- Purchase request processing
- Receive/process PO paperwork
- Maintain/update tracking spreadsheet for purchases
- Follow up on PO issues weekly

Faye

- Receiving
- Accounts Payable
- Indirect cost budgets
- Reconcile grant accounts
- Follow up with vendors on missing items
- VCOM packages

Kaycee

- Travel reimbursements
- Check requests for individuals
- Special meals
- maintain tracking sheet for reimbursements

Guidelines for emailing orders or reimbursement requests

- All emails for any orders/reimbursements should go to **coporder@ulm.edu**
- Please use one of the following categories in your subject line so that the email will be routed to the appropriate folder:
 - Purchase Req
 - Travel
 - Check request
 - Special meals
- When following up on an item, please use the following steps
 1. Check the tracking spreadsheet at: https://ulmwarhawks-my.sharepoint.com/:x:/g/personal/mwells_ulm_edu/EWTfww3NRwhGqfi8yckHf-ABsROT1sSPfTB0nUzi_CDqPQ?e=2tOk0O
 2. Send an email to coporder@ulm.edu, using the above categories in the subject line, along with an indication that you are following up. For example: travel reimbursement follow-up. Please allow **2** business days for a response.
 3. Contact the responsible staff member by phone or in-person.

General expectations/reminders

- In order for the Business Office staff to have time to address the needs of the College, please limit phone calls or in-person visits to the hours of **9am - 3pm**. This will allow the focused time needed to process requests.
- Purchase Req
 - **Limit of 1 purchase request per email**
 - **No more than 12 items per purchase request**
 - Will be processed within **2** business days.
- Reimbursement to an individual
 - Completed paperwork will be sent to main campus each Thursday. Paperwork received by Monday of the week should be included, assuming all needed documentation has been received.
 - Travel
 - ULM policy stipulates that travel reimbursements are to be submitted within 30 days of travel.
 - Please submit your travel documents to the Business Office within 14 days to allow adequate time for processing in order to meet the 30 day deadline.