Table of Contents

INTRODUCTION .................................................................................................................................................. 7
ACADEMIC DATES, DEADLINES AND CALENDARS ................................................................. 9
ADJUNCTS/Part time (OPS) Instructors ........................................................................................................ 12
(See Hiring Processes for specific procedures on Adjunct hiring.) ....................................................... 12
ADMISSION--GRADUATE APPLICATION PROCESSING ................................................................. 17
ANNUAL EVALUATIONS ......................................................................................................................... 18
ANNUAL REPORTS .................................................................................................................................. 21
BANNER SYSTEM ........................................................................................................................................ 22
Banner Production .................................................................................................................................. 22
Banner General Ledger Crosswalk ........................................................................................................... 23
Banner Student ......................................................................................................................................... 24
BDMS (BANNER DOCUMENT MANAGEMENT SYSTEM) ............................................................... 27
BOOK ORDERS ........................................................................................................................................ 28
Desk Copies ............................................................................................................................................... 28
Exam Copies ............................................................................................................................................... 28
BOOKSTORE, UWF (FOLLETT) ........................................................................................................... 29
BUDGET TRANSFERS .............................................................................................................................. 31
BUSINESS & AUXILIARY SERVICES ................................................................................................. 32
Name Badges ......................................................................................................................................... 32
Employee Name Badge Order Form ....................................................................................................... 32
Nautilus Cards ......................................................................................................................................... 33
BUSINESS CARDS AND STATIONERY ................................................................................................. 36
CAERS (Combined Activity/Effort Reporting System) .......................................................................... 37
CAMPUS DIRECTORY ........................................................................................................................... 43
Departments ............................................................................................................................................... 43
Organizations ........................................................................................................................................... 45
People ....................................................................................................................................................... 45
CASH TRANSMITTALS ............................................................................................................................. 46
CICS ........................................................................................................................................................... 48
CLASSROOM SCHEDULER ...................................................................................................................... 49
CONFLUENCE .......................................................................................................................................... 61
COPY SERVICES ...................................................................................................................................... 62
INTRODUCTION

This handbook assists with the policies and procedures of a Department Administration position assigned to an academic department. The goal is to answer a number of frequently asked questions and to provide a reference guide for interaction with various other offices made necessary in conducting the business and curricular aspects of the academic department. Tasks and duties are explained in detail and website addresses or links are provided when appropriate, along with contact information for added assistance.

The size and complexity of this document may be daunting, but that is because it is the nature of academic departments that they must conduct business with practically every other office on campus. And, it is the requirement of Department Administrators that they have a working knowledge of the procedures for all of them. However, the specific needs of each academic department varies according to size and nature of the discipline, so the administrator’s duties will also vary with the respective faculty involvement and other staffing available. There are also considerable variations in Departmental-level duties between Colleges. This handbook will try to cover most all eventualities and err on the side of thoroughness; therefore, there may be a number of sections provided below that do not pertain to the duties of a specific department or staff member.

Also note that for many of the tasks discussed in this handbook there is such an underlying complexity of rules and procedure that specific training is advisable and usually required. These will be noted in the discussions, and it is advisable that new administrators make an early effort to familiarize themselves with the “Training Reservation Desk” section in this handbook. Below is a list of suggested training sessions for any new academic administration staff member:

- FERPA
- Preventing Discrimination & Harassment
- Banner Navigation (Banner Basics)
- PCard Basic (Purchasing Card)
- Banner Requisition
- Budget Certificate
  - Budget Basics
  - Budget Transfer & Reports
  - Where Does the Money Go
- Procurement Basics
- Banner Student Introduction & Overview
  - Banner Student Registration Demo
  - Banner Student: Degree Works Introduction & Overview
  - Cash Transmittal -- Take training with Linda Howard
Administration Responsibilities for Academic Departments

The Department Administration staff member is primarily responsible to the Chairperson of the Department.

A. Assists the Chair with duties relating to College responsibilities, such as annual reporting, program reviews, faculty evaluation and recruitment.
B. Assists the Chair in managing the curricular responsibilities of the Department, including class scheduling, faculty/instructor/adjunct hiring documentation, departmental meetings, and governance.
C. Assists the Chair in budget management. Monitors spending, makes recommendations, maintains monthly records on spending for all Departmental funds; i.e., E&G, Research, Special or Foundation. Processes all spending documentation via PCard charges, travel reimbursements, purchase requisitions, cash reimbursements, consulting services charges, etc.

The Department Administration staff member works with faculty, other staff, and students.

A. Coordinates and facilitates the faculty teaching responsibilities, including material needs (office space and supplies), travel documentation, academic research support documentation.
B. Provides guidance and troubleshooting for student needs and student records administration to support faculty/staff/adjunct advising. (In some Departments, these duties may be handled by a designated Advisor/Academic Coordinator position.)

The Department Administration staff member represents the Department and University in their contact with students, their families, and the community.

A. Should strive to be courteous and helpful to all who contact the Department offices, whether in person, on the phone, or via the Internet.
B. Should strive to uphold the tenor of the University’s Mission, Vision, and Values (http://uwf.edu/uwfmain/about/mission/) throughout the conduct of all work duties.

UWF is a vibrant and active organization that is constantly working to improve efficiency and effectiveness, so duties and responsibilities for all faculty and staff evolve through time. Therefore, the material covered in this handbook can never be complete. Employees must always be ready to take on new ideas, procedures, and competencies.
ACADEMIC DATES, DEADLINES AND CALENDARS

Description and purpose: A thorough knowledge of the annual cycle of university proceedings is vital to effective management of any academic department with its multitude of tasks and duties. Awareness of upcoming departmental needs is absolutely necessary for proper time management. Although many requirements of Department Administrators are ongoing, or constitute responding to needs as they arise (the day-to-day putting out fires activities), these tasks are above and beyond those standard duties with usual and recurring due dates and deadlines.

UWF academic calendars available online are a necessary resource to guide these duties and are also a very useful resource for answering many faculty and student questions. The calendars are located at the link provided here, or are accessed in MyUWF with the Academic Dates and Deadlines app.


Note that the Academic Calendar site for each year (13-14 or 14-15) includes more detailed calendars by semester. An example, the Fall 2014 is included at the end of this section.

The calendars website is housed in the Office of the Registrar. The link for contact information is provided below or is accessed in MyUWF; click on Campus Directory, Departments tab, then select the Registrar’s group icon.

http://uwf.edu/offices/registrar/about-us/whom-do-i-contact/

The following lists a number of standard recurring tasks, beginning with the Summer preparation work for the new academic year. Consult individual sections within this document for detailed instructions on each of these tasks.

July: Faculty assignment letters
Fall Adjunct requests/appointment forms
Fall Graduate Assistantship/Teaching Assistantship (GA/TA) matriculation fee waiver spreadsheet
Fall Graduate Assistantship action sheets
Fall/Spring graduate scholarship forms
Curriculum Change Requests
Staff annual performance evaluations
Summer graduation application monitoring and Action Plans

Aug: Process Summer student evaluations

Sept: Set Spring schedule
Resource Allocation Committee (RAC) faculty travel funding requests
Oct: Spring Graduate Assistantship/Teaching Assistantship (GA/TA) appointment memos
Spring Textbook Orders due

Nov: Spring Adjunct request/appointment forms
Spring Graduate Assistantship matriculation fee waiver spreadsheet
Spring Graduate Assistantship action sheets
Fall graduation application monitoring and Action Plans

Dec: Process Fall student evaluations
Submit Fall Adjunct/Teaching Assistant evaluations
Spring graduate scholarship forms (if not included in the Fall submission)

Jan: Resource Allocation Committee (RAC) faculty travel funding requests

Feb: Set Summer and Fall schedules

Mar: Catalog copy updating
Summer faculty work assignment letters
Summer Adjunct request/appointment forms
Summer Graduate Assistantship/Teaching Assistantship (GA/TA) appointment memos
Summer Graduate Assistantship matriculation fee waiver spreadsheet
Summer Graduate Assistantship action sheets
Summer Textbook Orders due

April: Process Spring student evaluations
Submit Spring Adjunct/Teaching Assistant evaluations
Fall textbook orders due

May: Spring degree submission
Fall Graduate Assistantship/Teaching Assistantship (GA/TA) appointment memos

June: Finalize budget records for the previous fiscal year, including Budget Transfers as needed
Submit Records Dispensation forms, as needed
<table>
<thead>
<tr>
<th>ACADEMIC CALENDAR</th>
<th>FALL TERM 2014</th>
</tr>
</thead>
</table>

### ACADEMIC DATES & DEADLINES

<table>
<thead>
<tr>
<th>Event</th>
<th>Part of Term 1 8/25-12/13</th>
<th>Part of Term 2 8/25-10/10</th>
<th>Part of Term 3 10/15-12/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advance Registration for current degree-seeking students by current classification</td>
<td>4/14-4/20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Open Registration for currently enrolled, new transfer, or readmitted degree-seeking students (new undergraduate students should contact the Office of Student Transition Programs for orientation/registration dates)</td>
<td>4/21-8/3</td>
<td>4/21-8/3</td>
<td>4/21-8/3</td>
</tr>
<tr>
<td>Non-degree Graduate Registration</td>
<td>4/28-8/3</td>
<td>4/28-8/3</td>
<td>4/28-8/3</td>
</tr>
<tr>
<td>Regular Registration (Undergraduate non-degree and all other categories)</td>
<td>8/4-8/24</td>
<td>8/4-8/24</td>
<td>8/30-10/14</td>
</tr>
<tr>
<td>Late Registration ($100 late registration fee)</td>
<td>8/25-8/29</td>
<td>8/25-8/29</td>
<td>10/15-10/22</td>
</tr>
<tr>
<td>Registration for state employees with waivers</td>
<td>8/25-8/29</td>
<td>8/25-8/29</td>
<td>10/15-10/22</td>
</tr>
<tr>
<td>First Day of Classes</td>
<td>8/25</td>
<td>8/25</td>
<td>10/15</td>
</tr>
<tr>
<td>Letter grade to pass-fail or audit deadline</td>
<td>8/29</td>
<td>8/29</td>
<td>10/22</td>
</tr>
<tr>
<td>Graduation application period (including A.A.)</td>
<td>8/25/14-10/31/14</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cancellation of Audit (to letter grade) deadline</td>
<td>9/19</td>
<td>9/5</td>
<td>10/29</td>
</tr>
<tr>
<td>Withdrawal deadline from all courses with partial refund; automatic grade of &quot;W&quot;</td>
<td>9/19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submission deadlines for master’s thesis and doctoral dissertation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Withdrawal deadline from an individual course or all courses for part of term; automatic grade of &quot;W&quot; (No withdrawals after this date for specified part of term)</td>
<td>10/31</td>
<td>9/26</td>
<td>11/14</td>
</tr>
<tr>
<td>Cancellation of Pass-Fail (to letter grade) deadline</td>
<td>10/31</td>
<td>9/26</td>
<td>11/14</td>
</tr>
<tr>
<td>Grade Forgiveness form deadline</td>
<td>12/13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Removal of &quot;I&quot; (incomplete grade) deadline from previous term</td>
<td>12/5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Day of Classes</td>
<td>12/5</td>
<td>10/10</td>
<td>12/5</td>
</tr>
<tr>
<td>Final Examinations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commencement</td>
<td>12/13</td>
<td>12/16</td>
<td>11/16</td>
</tr>
<tr>
<td>Term grades due @ 9:00 a.m.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### OTHER IMPORTANT DATES AND DEADLINES

- Freshman admission application priority deadline (U.S. and International students) | 6/1/2014 |
- Undergraduate transfer admission application priority deadline (U.S. and International students) | 6/1/2014 |
- Graduate admission application deadline (U.S. and International students) | 6/1/2014 |
- Deadline for qualification and submission of all documentation to change residency status (Part of Term 3 deadline applies to students not attending Part of Terms 1 or 2) | 8/18 | 8/18 | 10/8 |
- Fees due ($100 late charge if fees not paid by this date) Last day to receive full refund of fees (Part of Term 3 deadline only applicable to students not attending Part of Terms 1 or 2) | 8/29 | 8/29 | 10/22 |

### HOLIDAYS (classes suspended)

- Labor Day – 9/1/2014
- Veteran’s Day – 11/11/2014
- Thanksgiving Holidays – 11/27/14-11/28/14

Contact Registrar’s Office for Part of Term 5-9 deadlines.
ADJUNCTS
Part time (OPS) Instructors

(See Hiring Processes for specific procedures on Adjunct hiring.)

*Description and purpose:* The full-time (line item) instruction faculty at the University is supplemented by a large component of part time teaching staff. The positions are hired on a semester-to-semester basis, based on the courses offered within a particular schedule. Once a schedule is set, each Department submits adjunct requests or appointment forms (the particular procedures vary among the colleges) providing a list of sections to be taught for each adjunct faculty hired. Sample forms, one for each college, are included below.

Anyone hired as instructional staff at the University must present credentials demonstrating their qualifications for teaching. A portfolio of relevant documents must be on file in Dean’s offices before any hiring actions are submitted to Human Resources. The basic elements of the portfolio should include a curriculum vita, two letters of recommendation, transcripts for the highest level degree achieved and demonstrating the minimum 18 hours of graduate-level course work in the teaching field, and a Faculty Qualifications Worksheet [see FACS (Faculty Academic Credentials System) Database section].

COLLEGE OF BUSINESS

ADJUNCT APPOINTMENT FORM  2015

SEMESTER: _______ Fall _______ Spring _______ Summer  (Mark One)

DEPARTMENT: _______ Marketing & Economics

ADJUNCT NAME:

SEX: ___  RACE: ___

TITLE: _____ Ms.,  ____ Mr.,  ___ Miss,  ___ Mrs.,  ___ Dr.  (Mark One)

RANK:  ___Lecturer,  ____Instructor,  ____ Assistant,  ___ Associate,  ___ Professor  (Mark One)

ADDRESS:

UWF Identification No::

APPOINTMENT: ___ New Hire  ____ Reappointment  (Mark One)

COURSE INFORMATION:

<table>
<thead>
<tr>
<th>Course Number/Section</th>
<th>Course Title</th>
<th>Credit Hrs</th>
<th>Day/Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAR 3023-10495</td>
<td>Marketing Fundamentals</td>
<td>3.0</td>
<td>MW 5:30-8:50 pm</td>
<td>FWB</td>
</tr>
</tbody>
</table>

TOTAL AMOUNT TO BE PAID:

DATE SEMESTER/CLASS BEGINS: 01/05/2015

DATE SEMESTER/CLASS ENDS: 04/24/2015

TO BE COMPLETED BY DEAN'S OFFICE:

OFFER LETTER SENT:

OFFER LETTER RETURNED:

ACTION SHEET PROCESSED:
COLLEGE OF EDUCATION AND PROFESSIONAL STUDIES

ADJUNCT APPOINTMENT FORM

SEMESTER (Check One): ☐ FALL ☐ SPRING ☐ SUMMER ☐ YEAR

DEPARTMENT: ___________________________ ☐ REVISION

ADJUNCT NAME: ___________________________

IS ADJUNCT (Check One): ☐ New * ☐ Returning
* If Adjunct is new please indicate the date the background screening was cleared by Human Resources

TITLE (Check One): ☐ Ms. ☐ Mr. ☐ Dr.

HIGHEST DEGREE AWARDED *
* Please attach justification for exception involving the substitution of experience

EMAIL ADDRESS: ___________________________

TELEPHONE: __________________ UWF ID #: __________________

COURSE INFORMATION:

BEGINNING DATE: ____________ ENDING DATE: ____________

<table>
<thead>
<tr>
<th>COURSE PREFIX &amp; NUMBER</th>
<th>SECTION NUMBER</th>
<th>TEAM TAUGHT</th>
<th>DUAL LISTED</th>
<th>SUPERVISION OF STUDENT TEACHER</th>
<th>CREDIT HOUR</th>
<th>LOCATION TAUGHT</th>
<th>**AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

TOTALS:
* Masters (Max of $1,500 per 3 credit hour course)

Doctorate in field (Max of $2,500 per 3 credit hour course)

Please attach justification involving the exception to the max pay rate

DEPARTMENT CHAIR SIGNATURE ____________ DATE ____________
**COLLEGE OF SCIENCE, ENGINEERING, AND HEALTH**

**ADJUNCT APPOINTMENT FORM**

**SEMESTER (Check One):**  ■ FALL  ■ SPRING  ■ SUMMER  ■ YEAR

**DEPARTMENT:** ___________________________  ■ REVISION

**ADJUNCT NAME:** ___________________________

**IS ADJUNCT (Check One):**  ■ New  ■ Returning
* If adjunct is new please indicate the date the background screening form was submitted to Human Resources

**TITLE (Check One):**  ■ Ms.  ■ Mr.  ■ Dr.

**RANK (Check One):**  ■ Instructor  ■ Assistant  ■ Faculty Associate  ■ Associate  ■ Professor

**HOME ADDRESS:** ___________________________

**EMAIL ADDRESS:** ___________________________

**TELEPHONE:** ________  UWF ID #: __________

**COURSE INFORMATION:**

**BEGINNING DATE:** __________  **ENDING DATE:** __________

<table>
<thead>
<tr>
<th>COURSE PREFIX &amp; NUMBER</th>
<th>SECTION NUMBER</th>
<th>CROSS-LISTING*</th>
<th>CREDIT HOURS</th>
<th>LOCATION TAUGHT</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTALS:**

0 0

*If Cross-Listed, Please indicate the section number to the course to which it is cross-listed.

**DEPARTMENT CHAIR SIGNATURE** ___________________________  **DATE** ___________________________________
**COLLEGE OF ARTS, SOCIAL SCIENCES & HUMANITIES**

**ADJUNCT APPOINTMENT FORM**

**SEMESTER:** Summer  
**YEAR:** 2017

**DEPARTMENT:**  

**ADJUNCT NAME:**  

*IS ADJUNCT (Check One): [ ] New*  
[ ] Returning

*If Adjunct is new please indicate the date the background screening was cleared by Human Resources*

**TITLE:** Dr.  
**RANK:** Professor

**HIGHEST DEGREE AWARDED**

*Please attach justification for exception involving the substitution of experience.*

**HOME ADDRESS:**  

**EMAIL ADDRESS:**  

**TELEPHONE:**  
**UWF ID#:**

**COURSE INFORMATION:**

**BEGINNING DATE:**  
**ENDING DATE:**

<table>
<thead>
<tr>
<th>COURSE PREFIX &amp; NUMBER:</th>
<th>CRN</th>
<th>TEAM TAUGHT %</th>
<th>CROSS LISTED</th>
<th>CREDIT HOUR</th>
<th>LOCATION</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**DEPARTMENT CHAIR SIGNATURE**  
**DATE**
ADMISSION--GRADUATE APPLICATION PROCESSING

Description and purpose: All admissions materials submitted by students applying to UWF graduate programs are handled in the Graduate School Office. These documents are placed online via the Banner Document Management System (BDMS) for access by the various Departments with graduate programs.

Department Administrators are sent an updated spreadsheet via email each week that lists current graduate applications.

The basic data on a prospective student’s application and a list of specific materials received can be monitored in Banner using the SAAADMS, SOAPCOL, SOATEST, and SOAHOLD screens. Instructions on viewing this data are available in Confluence: https://confluence.uwf.edu/display/BPL/Viewing+Graduate+Application+Information+in+Banner

The required documents for the admission packet varies by department, but will usually contain transcripts, test scores, letters of recommendation, and work samples.

Once the Graduate School has received all items required for an application portfolio, the Graduate Application Data Sheet is sent out in campus mail to the appropriate Department for the admission decision.

At this time, the Department Administrator can access all documents for the portfolio through the BDMS system. Instructions for accessing documents are provided in Confluence at the following link: https://confluence.uwf.edu/pages/viewpage.action?pageId=12330846

Once the Department Chair or (Graduate Committee, as the case may be) has determined the application decision, the data sheet is signed, indicating whether the prospective student is admitted, admitted on provisional status, admitted on conditional status, or denied admission. The form is then returned to the Graduate School office for final admission processing.

The Graduate School sends out a letter of offer to the applicant, who must then confirm their acceptance before the student is placed in active status with the Registrar. Individual Departments may also at this time send out welcoming letters and packets with additional information on their particular programs.

For complete information on the application process, please consult the Graduate School web page: http://uwf.edu/graduate/
ANNUAL EVALUATIONS

(Note: For procedures on evaluating full-time staff please refer to the Employment Position Management section of this handbook.)

Description and purpose: The purpose of Annual Evaluations is to assess the performance of the full-time faculty, adjuncts and teaching assistants and to speak to the improvement of the performance during the past year.

Full-Time Faculty

The Annual Evaluation process for full-time faculty takes place at the end of each Spring semester and is an online procedure available on the Faculty Academic Credentials System (FACS) site in MyUWF.

A. Faculty members initiate the process by completing a self-evaluation form. The annual evaluation form allows faculty to post supporting documentation for their teaching, research and creative activities, and their service work.

B. As further support for the teaching portion of the self-evaluation, Department Administrators must provide hard copies of the faculty Student Evaluation reports for the previous year.
   1. Prepare a file folder for each faculty member with the label indicating the appropriate academic year and Department.
   2. Inside each folder attach the Assessment Summary Reports and Verbatim Comments for each course taught in the previous Spring, Fall and Summer semesters. (See the Student Evaluations section of this handbook for information on processing student evaluations.)
      Submit all files to the Chair for preparation of the Chair’s Evaluations.

C. The faculty member submits their self-evaluation electronically to the Chair.
D. The Chair consults the self-evaluation and Student Evaluations file, then adds their evaluation to the form, and forwards it electronically to the appropriate College Dean.

E. The Department Administrator then forwards the Student Evaluation files to the Dean’s office for the Dean’s Evaluation.

F. The College Dean also consults the Student Evaluation files and responds to the Chair’s evaluation, then forwards the form to the Provost’s office for the final evaluation.

G. Once the evaluations have been completed through the Provost level, the Department Administrator can obtain file copies and CV updates (which are attached to each self-evaluation) via the Review Evaluations site on the Annual Evaluation tab in FACS. These are placed in the Departmental faculty personnel files.
Adjunct (Part-Time) and Teaching Assistant Faculty

Adjunct faculty and Graduate Teaching Assistants are evaluated by the Chair at the end of each Fall and Spring semester. Departmental Administrators provide the appropriate forms and Student Evaluation information for the Chair’s evaluation of either “satisfactory and is eligible to be rehired,” “satisfactory, but needs improvement,” or “unsatisfactory and should not be rehired.”

A. The evaluation forms are provided on the FACS site via the Departmental Management tab. Click on the Adjunct Faculty & GA Reviews button, select the appropriate semester, and print the forms generated by the site. (See the example form from the College of Business on the next page).

B. Prepare a set of Assessment Summary Reports and Verbatim Comments for each instructor for each course taught of the previous semesters. (See the Student Evaluations section of this handbook for information on processing student evaluations.)

C. Submit the forms and student evaluation packets to the Chair.

D. Forward the signed forms to the appropriate Dean’s office. Place file copies of the evaluations and the student evaluation packets into the Department adjunct faculty and graduate student files.
College of Business
Adjunct Faculty and GA Review Form
Fall 2014

Department:
Name of Adjunct:
Course(s):

I have reviewed the student teaching evaluations for the above-named part-time instructor in the current semester. I have provided these evaluations to the instructor and invited him/her to discuss the evaluations with me, if he/she would like to do so. I have determined that the part-time instructor has performed in a manner consistent with the following category:

___ 1-In a satisfactory manner and is eligible to be rehired
___ 2-In a satisfactory manner but needs improvement.
   Comment:

___ 3-In an unsatisfactory manner and should not be rehired.
   Comment:

Signed: ___________________________ Date: __________
ANNUAL REPORTS

Description and purpose: Annual Reports serve to provide the upper administration with details on the significant activities of the Department each year. These include faculty endeavors, as reported in the faculty annual evaluations: publications, presentations, and service activities; and Department events, such as lectures, competitions, exhibitions, performances, conferences, or any other notable accomplishments.

Most importantly, the Annual Reports provide information on assessment. The Department report provides basic assessment data, the resulting goals and objectives established in response to the data, the specific activities undertaken to meet objectives and accomplish goals, and the progress toward these ends.

Annual Reporting is implemented through the use of a specialized online system called SPOL (Strategic Planning On Line). Authorized access to this system is through the Department Chairs only, so Department Administrators only assist in gathering information for reporting. The reports are sent to the Administration each July, but the online system allows Chairs to update reporting information on a constant basis. The data no longer have to be archived, then reconstituted at the end of the academic year.
BANNER SYSTEM

Description and purpose: The UWF Banner system is the complex database software package that handles all records for university function from the financial and purchasing side to Human Resources and employee matters to all student, course, and scheduling materials. Banner presents most reporting on the base data through a range of web portals available to most staff and students via SSB (Self-Service Banner) sites in MyUWF or through reporting software such as Information Navigator and Tableau. Those staff who are charged with entering content directly into the database system or making alterations in records access Banner through INB (Internet Native Banner) forms via Banner Production.

NOTE: Banner Production is an app in MyUWF, but Information Technology Services (ITS) recommends that you enter Banner Production via the Banner Browser, which has been installed on most PC staff computers. Go to your start button on your computer in the lower left corner. Go to All programs, then to Banner Browser, then Banner Browser. Sign in with your UWF UserName and password. If you do not find the Banner Browser on your computer, contact ITS HelpDesk at x2075.

Access to Banner Production is restricted to staff whose job description indicates the need for direct access to university records. Specialized training is required for navigating the system and for each application to be accessed via INB forms. Authorization for access is requested via Security Access Request forms (for either Finance and HR or Student System) available in MyUWF and processed through the RouteIt system.

Online training modules for SSB and INB functions are available in Confluence, the central UWF documentation site: (https://confluence.uwf.edu/display/BPL/Banner+Navigation+Online+Training).

This site not only provides screenshot step-by-step instructions for most official processes in Banner, but also provides feedback and question and answer forum links throughout. The content for the Banner Navigation course is available from this page; however, you must SIGN UP IN THE TRAINING RESERVATION DESK in order to access the mandatory final quiz offered through eLearning. You must sign up at least one day in advance. The day after you sign up, you will be able to access the Banner Navigation course/quiz from the eLearning app in MyUWF.

Banner Production

Database information is accessed or input via the Banner Forms sites which are accessed via seven-letter form codes (i.e., SFASRPO) entered in the Go To… block at the top of the Banner main page or by clicking on the appropriate sub file within the eight files of data sources (Student, Finance System, Accounts Payable, Human Resources, Accounts Receivable, Financial Aid, General, and Document Management). There are literally hundreds of codes, so generally you encounter only those appropriate to your work responsibilities. Training sessions for any process that requires input within the INB system will provide the appropriate form codes needed.
Banner General Ledger Crosswalk

This service allows faculty and staff to search and maintain the crosswalk of general ledger accounting codes from SAMAS to Banner. SAMAS is the old state accounting system, where departments had to be 9 digits in length and used object codes instead of account codes.

There are several offices throughout the campus, primarily in Financial Services and Procurement that still make use of the SAMAS codes in their documenting processes. Therefore, the translation across systems is still necessary.

The search facility allows users to enter the most commonly used SAMAS accounting codes (department number and object code) and find their Banner equivalents. A restricted access maintenance menu is available to designated personnel in Finance and Accounting Services.

Go to MyUWF and in the search type “Banner General Ledger Crosswalk.”

The Crosswalk is a table of SAMAS accounting codes with the corresponding Banner equivalent(s). The tables are used to convert SAMAS accounting codes generated by legacy systems to Banner accounting codes and Banner accounting codes back to SAMAS accounting codes.

There are three crosswalk tables:

- The first converts SAMAS department number to the equivalent Banner fund-orgn-prog code combination.
- The second converts SAMAS object code to Banner account code.
- The third converts SAMAS fixed asset location code to a Banner location (LOCN) code.

This Service allows UWF staff and faculty to search for Banner account codes with the corresponding SAMAS department numbers, object codes, and department and object code names. It will permit searching Banner Organization, Fund, Program and Account codes by either code or name providing the corresponding SAMAS department number and/or object code.

Authorized personnel in the Controller's Office can use the service to add new or update existing crosswalks from SAMAS department number to Banner Fund-Orgn-Prog codes as well as crosswalks between SAMAS object code and Banner Acct code.

Contact Financial Services with any questions.

http://uwf.edu/offices/financial-services/about-us/who-to-call/
Banner Student

This database replaced the original State of Florida CICS (Customer Information Control System) in Fall of 2014. Most Banner Production INB data input is housed within the Registrar’s office, with information accessed through MyUWF apps and Tableau reports and will be discussed in other sections of this handbook when appropriate. However, there are a few INB forms that are used in scheduling and advising processes. Specific instructions on accessing and using any of these forms can be found in Confluence. A selection of forms which will most likely be used in Department Administration are included below:

SSASECT – This form provides all the data on a specific course reference number (CRN) as scheduled for a specific semester by staff in the Registrar’s office. Information includes instructor, times, dates, location, enrollment numbers, instruction method, schedule type, and so on. This site can be used to verify the scheduling information requested by your Department. If
any errors are found in the record you must contact Records and Registration to request changes. Currently, all scheduling matters are handled by Kendra Loucks (kloucks@uwf.edu, ext. 3389).

Complete information on all classes for a semester is available in table form via a Tableau report, REG_SchedulingOverview accessed via Confluence at this address: https://confluence.uwf.edu/pages/viewpage.action?title=REG_SchedulingOverview&spaceKey=DD

Or you can use the course offerings report in Tableau accessed via the Deans and Chairs Guide in Confluence: https://confluence.uwf.edu/display/BPL/Dean+and+Chair+Guide

In the guide scroll to the end of the “Course Scheduling” section and click on the link: “Course offerings report.”

SHAGAPP – This form provides specific information of individual students who have applied for graduation in a particular semester. Information includes the date of application and graduation, graduation status, catalog year and major, and name and address data to be included on the diploma. This site can be used to verify the application information of the student. The information provided on this form can also be accessed through the Student Information Menu on the Faculty/Advisors tab in MyUWF, click on View Application To Graduate.

A listing of all applicants for a given semester is provided in table form in Tableau and is accessed via Confluence at the following address: https://confluence.uwf.edu/pages/viewpage.action?pageId=15177178

Click on the link, “Graduation Dashboard” at the beginning of the Overview section.

Please see the section on Graduation Applications for more information on Department Administrator responsibilities for application processing.

SFASLST – This form provides the Course Roll on a specific course reference number (CRN) in a specific semester. It lists each student enrolled in the course and their UWF ID number and the final grade issued for the course and comments, if provided by the instructor.

SCARRES – This provides Registration Restriction information on specific courses, whether by Department or Field of Study, Class and Level, Degree Program, Campus or College, or Student Cohort.

SFASRPO – This form is used for setting up Overrides for particular students to be allowed into particular classes where registration is prevented by special circumstances, such as required cohort status (Honors, Delphi, particular college or major, senior-level, and so on), capacity (registration beyond the course enrollment limit), pre-requisite requirements, or Department-level permissions.

SFAREGQ – This is the Student Registration/Class schedule form, which provides specific information on an individual students’ course registration for a given semester. The information
provided on this form can also be accessed through the Student Information Menu on the Faculty/Advisors tab in MyUWF, click on Concise Student Schedule.

SFASTCA – This is the Course Registration Audit for a specific student in a specific semester. It provides detailed information on the registration process for the semester, giving times and dates for each course added or removed from the student’s schedule.

SHACRSE – This is the Student Course Summary that provides a listing of courses taken for each semester enrolled at UWF. The form includes hours earned and assigned grade for each class. The information provided on this form can also be accessed through the Student Information Menu on the Faculty/Advisors tab in MyUWF, click on View Academic Transcript.

SHATERM – The form provides the Current Standing and Overall GPA information for specific semesters. The information provided on this form can also be accessed through the Student Information Menu on the Faculty/Advisors tab in MyUWF, click on View Academic Transcript.

SPAIDEN – This provides general demographic information on a specific student: address, telephone, emergency contacts, and so on. The information provided on this form can also be accessed through the Student Information Menu on the Faculty/Advisors tab in MyUWF, click on Student Address and Phones.

SPACMNT – This provides information on allowed access to student information normally restricted with FERPA privacy regulations. The form lists those individuals a student has authorized to receive records data through submission of an Authorization for Release of Student Information form. The information can also be accessed through the Student Directory Information app in MyUWF. (See the section on FERPA in this handbook for more complete description of privacy rules and the Authorization form.) A more complete description of the Banner form is available in Confluence at the following link: https://confluence.uwf.edu/pages/viewpage.action?pageId=12322311
BANNER DOCUMENT MANAGEMENT SYSTEM (BDMS)

Description and purpose: The Banner Document Management System, (BDMS) is an electronic document management and imaging system utilized by the Graduate School to maintain graduate student records. As student applicants provide their portfolio items to the Graduate School, documents are uploaded onto the BDM system and Department Administrators of the appropriate Department are notified.

If you do not have access to BDMS, please contact ITS at x2075 to get set up in BDMS. To access BDMS go to MyUWF, enter “BDMS” in the Search bar. It is recommended that you operate BDMS in Internet Explorer. For operating instructions on BDMS go to MyUWF, in the Search bar, type “Confluence,” then, on the Confluence main page, type in “Viewing Documents in BDM” and choose the first result at the top of the page.

If you have questions about BDM, call Lauren McCracken x7720 in the Graduate School.

Once a particular portfolio is complete, then notify the appropriate Department faculty members to access the file in BDM to review the portfolio for decisions on admission.
BOOK ORDERS

Description and purpose: Textbooks, Supplemental Materials, and Exam Copies may be ordered through the UWF Bookstore for use in courses taught each semester.

Desk Copies

Complimentary desk copies are available for instructors who adopt textbooks by almost all publishing companies. Desk copies are free from the publisher because the professor has placed an order for the textbook through The UWF Bookstore (Follett).

A. Desk copy requests can be placed on the publishing company website or by faxing the request on UWF official letterhead.
B. The information required is as follows (1) title, authors and ISBN of the textbook, (2) name of professor teaching the course, (3) course name and number, (4) semester textbook will be used, (5) enrollment in the course (6), and how many desk copies you are requesting.
C. Request the desk copy to be mailed to the professor or Department office using the UWF mailing address.
D. Desk copies cannot be mailed to a home address.

Exam Copies

Examination copies are provided for instructors who are considering a textbook for their course. This means the professor is checking out the textbook and not sure if he/she will use it or not.

A. Exam copy requests can be placed on the publishing company website.
B. Most publishers charge a small fee for an exam copy and will give a time frame as to when to return the textbook.
C. In some departments the fee is paid by the professor by personal check. In other departments the fee is paid by PCard.
D. The professor may choose to keep the textbook after they review it.
BOOKSTORE, UWF (FOLLETT)

*Description and purpose:* Follett is a major bookstore provider that has been in business since 1873. It has grown to be the largest educational bookseller in North America with more than 700 college bookstore partnerships. The UWF Bookstore carries new and used textbooks, supplemental materials, computers, school supplies, collegiate clothing, gifts and snacks. The store provides convenient services to UWF students such as "BookNow" online ordering program as well as a "Bookstore Deferment" program that allows students on financial aid to get their books faster. The store also provides a “Textbook Rental” program that allows students to pay less than half the new book price which is the most economical way to obtain textbooks.

Follett Corporate Website

UWF Bookstore Website

TEXTBOOK ORDERS

Textbook order adoption dates are below and are strictly enforced as they are set by Florida law:

- March 15 – Summer
- April 15 – Fall
- October 15 – Spring

The bookstore will accept textbook orders by email or online. Information required to place a textbook order is (1) title of book, (2) author, (3) publisher, (4) ISBN, (5) course title (6) course number, and (7) anticipated to class enrollment.

A. To order by email, contact Danny Worden in the Bookstore at dworden@uwf.edu or ext. 3095.

B. To order online, go to the UWF Bookstore app on MyUWF (or via the link above) to access the Online Adoption site (scroll down to the bottom of the screen under Faculty Services). This will connect you to the Follett system online adoption page (see following page). You will need to establish an account. Contact the bookstore to obtain a signup password.
Welcome to Online Adoption to Order Course Materials

Now it’s easier to order course materials into the campus bookstore!

New features include:
- Easier ordering by ISBN, including batch ordering
- Batch re-orders of course material you’ve used previously
- Order status tracking and information
- Latest info about digital updates, new editions, and course bundles
- Adding course materials across multiple sections

You’ll need an account to order. If you haven’t already received a signup password, please contact your bookstore.

We’re serious about your privacy.
We do not provide any personally identifiable information about you to any third parties without your consent, unless those third parties have agreed to our confidentiality provisions and only use the information to help us operate the site, or as we are required by law to disclose such information. Please read our complete Privacy Policy & Terms of Use.
BUDGET TRANSFERS

Description and purpose: Any transaction that requires budget amounts to be moved from one Banner fund to another or between designated budget lines within a particular fund that requires a budget transfer. To do this, you must complete training sessions by the Budgets Office.

The Office of University Budgets' staff have developed several training sessions for campus users to learn more about budgets and the budgeting process. Any transaction that requires budget amounts to be moved are accomplished in Banner Production via the Budget Transfer (BT) form (FGAJVCQ). Online BT Training: This training is provided twice per year for those employees that have been identified by their budget managers as having a need to be either a budget transfer initiator, approver, or both in our Banner Production System. To enroll in this class your supervisor must email budgets@uwf.edu requesting you be trained as either an initiator, an approver, or both. The prospective trainee must have completed Banner Basics, Budget Basics, and Budget Transfer Overview and Reports before they can attend this class. Specific training sessions provided by the Budget & Financial Planning Office (BFPO) are required before access to this system is authorized. [http://uwf.edu/budgets/Training.cfm](http://uwf.edu/budgets/Training.cfm)

The Online BT system is quite complex and the training manual available on the link above is over 150 pages long. Use of the BT form requires knowledge and understanding of the UWF fund numbering system (Index, Fund, Organization, Program); journal types (i.e., General Revenue, Carry Forward, Student Activity, Contracts and Grants, and so on); and account codes (salary, OPS [Other Personnel Services], expense, OCO [Operating Capital Outlay]. . . ).

Therefore, there are three different training sessions that must be completed before one is authorized to submit Budget Transfer requests: Budget Basics, Budget Transfers and Reports, and Online BT Training. Please consult the BFPO Training page (linked below) for information on obtaining authorization for Online BT training, or contact Valerie Moneyham (x2041, vmoneyha@uwf.edu) or Pamela Cadem (x2215, pcadem@uwf.edu) in the Budget and Financial Planning office.

The fund numbering system was altered at the point the Banner Financial system was adopted by the University in 2007, and the various funds in the University are now referred to by their Index numbers. Prior to this time, “accounts” were designated by a nine-digit number, the SAMAS codes. The first four digits of this number indicated the department, the middle three indicated various separate accounts within a specific department and the final two numbers defined the type of account, such as: general revenue (E&G), student activity, contracts and grants, auxiliary, or concessions. These accounts varied depending on their use and whether or not income could be added to the accounts as revenue, such as ticket sales for a theatre event. Since some financial services activities still use the SAMAS codes, the Banner General Ledger Crosswalk app (see Banner section in this handbook) is available on MyUWF. This provides a means of translating back and forth between account numbers and fund codes.
BUSINESS & AUXILIARY SERVICES

Description and purpose: Business & Auxiliary Services manage various operations that support the core mission of the University and are self-supported business services. These include the Bookstore, Copy Services, Dining Services, Licensing, Nautilus Cards, Parking & Transportation, Postal Services, Records Management, Student Printing, and Vending Services. (Detailed information on the services noted in bold are covered in individual sections in this handbook.) [http://uwf.edu/offices/business-auxiliary-services/overview/business-auxiliary-services-overview/](http://uwf.edu/offices/business-auxiliary-services/overview/business-auxiliary-services-overview/)

Associated services discussed below include: Name Badges and UWF Stationery Printing.

Name Badges

All UWF employees are required to have a name badge, and all name badges are similar in shape, color, and logo.

To order a new name badge log into MyUWF and type in the search “Name Badge.” An order form will come up and you will fill it in with the proper information. (See photo of a sample badge and order form below.)

Allow two weeks for delivery.

You can order up to 10 name badges at one time.

If you have any questions contact the Office of Business & Auxiliary Services at 474-3012. Make a copy of your order for your records before you click the submit button.

**Employee Name Badge Order Form**

You must enter an Employee Name.

Orders for UWF name badges are placed through the Business & Auxiliary Services office. The blue badges with cloisonné seal have **two lines for engraving** and a magnetic back. Cost per badge is $15.
To order a badge (or badges), please complete the form below and click on Submit.

Date

Contact Name:

Banner Index to charge:

Activity Code/Sub Account (if required):

Contact Phone: (____)

Contact Email:

Delivery Location (Bldg/Rm):

---

You may order up to 10 badges on this form. All must be charged to the same account. The following information will be engraved on the name badge(s).

Please do NOT include titles or credentials with names.

Name (first line):

Department (second line):

If you have questions or need additional information, please contact the Office of Business & Auxiliary Services office at Ext. 3012/2640.

Nautilus Cards

The Nautilus Card serves as the official ID card for the University. They are administered through the Business Affairs and Auxiliary Service office in Building 20W, Room 162, 850-474-3324. Contact: Joyce Hughes (jhughes@uwf.edu) or go to: http://uwf.edu/idcard/

All University students and employees are required to obtain a Nautilus card, which provides authorization for Library privileges, access to special events, field house facilities (HLS), and university pool (Aquatic Center). See below for a copy of the Employee Nautilus card application form, to be submitted only after the hiring process in Human Recourses is completed and a UWF ID# has been assigned.

The Declining Balance Account service allows you to place a dollar amount on the card via deposits at the Cashier’s Office, at a campus ADM (Automatic Deposit Machine), or online via MyUWF using your UWF User ID. The information contained in this website is not pulled from Banner, so there may be some discrepancies. The Nautilus Card Office is aware of errors on the page, so there is no need to contact them. Once you have completed your deposit(s), you are free
to use the card for fee payments or purchases at any Dining Services location, Postal Services, vending machines, copiers, the Bookstore, and WEPA printing kiosks.

[https://onewebprod.argo.uwf.edu/OneWeb/Account/LogOn](https://onewebprod.argo.uwf.edu/OneWeb/Account/LogOn)

Office Administrators are authorized to use Departmental funds for copier use and must monitor copier use by other staff or faculty. See **Copy Services** section for on obtaining monthly reports.
NEW EMPLOYEE NAUTILUS CARD FORM

Please complete this form and take it to the Nautilus Card office to obtain your card.

Proof of identification is required when obtaining a Nautilus Card. Driver’s License, State/Government issued picture ID, or Passports are accepted forms of identification.

EMPLOYEE NAME: ___________________________ UWF ID #: ______________________

DEPARTMENT: ___________________________ EMPLOYMENT DATE: ______/______/______

CIRCLE STATUS: LINE ITEM: [ ] Faculty [ ] Staff [ ] Other: _____________________________

NEW HIRE: [ ] Yes [ ] No

STATUS CHANGE: From ____________________ To __________________

___________________________ Employee Signature _____________________________

___________________________ Supervisor/Dept. Head Signature _____________________________

Location: Building 20W, Room 162 • Office Hours: Monday-Friday, 8:15am – 4:45pm • Phone: 850.474.3324

Rev: April 2010
BUSINESS CARDS AND STATIONERY

All University letterhead, envelopes, and business cards are standardized to provide consistent institutional identity and reduce design and printing costs.

The product design oversight is via the Office of University Marketing & Communications. Contact: Joy Ward (jward@uwf.edu, x2431). The website address can be found at: http://uwf.edu/offices/marketing/resources/official-uwf-stationery/ Orders may be placed, proofed, and paid with a UWF PCard.

UWF has a contract with Martin Litho, Inc. (MLI) to print UWF business cards and stationery.

A. Orders are placed with MLI through the Printing Services portal on the Go Shopping app on MyUWF.
   1. Select the Martin Litho, Inc. link for the contract summary.
   2. Follow the directions on the summary for user registration, then use the uwfprinting.com link to submit your printing order.
   3. For technical questions regarding ordering on the MLI site, contact Michael Shea, 800-741-6838, x227.
COMBINED ACTIVITY/ EFFORT REPORTING SYSTEM (CAERS)

Description and purpose: The CAERS site on MyUWF is the official means for reporting faculty activities as they relate to their work assignments and is the site used to produce the Faculty Work Assignment letters for all full-time faculty each Fall.

(Note: Due to the changes brought about by Student Banner, there are now two CAERS sites on MyUWF, one for all records prior to Fall 2014 and the other going forward from Fall 2014.)

The Chair must access this site at the beginning of each semester to certify courses taught by adjunct faculty for the previous semester.

All full-time faculty must access the site at the beginning of each semester to report on work activity for the previous semester. This is to verify their teaching course load (Credit-Generating Activities) and report on their research/creative, administrative or service activities (Noncredit-Generating Activities), or grant-funded work (Sponsored Research Programs), if these apply.

Department Administrators must access this site each Summer to set up the Work Assignment Letters for all full-time faculty in their department for the following academic year. This provides the basis for the report submitted by the faculty noted above. The workload for a full-time faculty member is measured in contact hours, the minimum being 12 hours per semester. Each three-hour course taught is considered to be three contact hours, so the standard full-time teaching load is four 3hr courses. All tenure-line faculty are assigned three contact hours for research and creative activities, so their base teaching load is three 3hr courses for a total of nine contact hours of teaching each semester. Other reductions to this number (Course Release) will take effect when faculty have specialized assignments related to administration or departmental needs. Some examples of such assignments are noted in the Non-Instructional Activities section below.

Procedures for building a Work Assignment Letter

A. On the CAERS site, choose the correct Fall semester in the drop down box in the upper left corner, then select Build/Edit Assignment Letter.
B. Use the drop down boxes to choose department and a specific faculty member.
C. Check the title and rank in the salutation. Sometimes the default incorrectly indicates “Mr.” when it should be “Dr.” or vice versa, or the rank may not be up-to-date. For instance the copy of the letter template included below shows Dr. Yeager’s rank as “Assistant Professor” instead of “Professor.”
D. The template includes a series of paragraphs, which are included in all letters, and a series of paragraphs that are to be included only when they apply to the year’s assignment for the particular faculty member. These paragraphs have a checked box beside them. If they should not be included in someone’s assignment, simply click in the box to exclude that paragraph.
E. INSTRUCTION -- The first section of the letter covers the teaching assignment. Note the number of contact hours for the Fall and Spring semesters, then in the Additional Narrative box list all courses to be taught, including course subject and
number, course reference number (CRN), and course title. The Additional Narrative section for the Spring semester can simply say TBA if the Spring schedule has not been set.

F. **NON-INSTRUCTIONAL ACTIVITIES** – The number of contact hours entered for Fall and Spring should be sufficient to bring the total number of hours to 12 for each semester when added to the instruction contact hours. Any specialized assignment can be mentioned here in the Additional Narrative box; for example, noting that someone is UFF representative, or Director of an office within a department, or Coordinator for a specific degree program within a department.

1. If the Advising section is to be included in the letter and there is a specific student population within the Department this faculty member will serve, then this should be noted in the narrative box.

2. The Scholarship and Creative Activities paragraph should be included only for tenure line faculty. Whether or not specifics are noted in the narrative box varies by Department.

3. The University, Public, and Professional Service section is noted when a faculty member is providing any special service to the University or community and particulars about that assignment should be noted in the narrative box. For example, the letter for Director of Composition has the following, “Direct the Department’s Composition Program for the University’s General Studies Program.”

4. The Program Coordination or Administration paragraph is included for any faculty member providing an administrative function for the University. The Department Chair would be the primary example for any Department, but other faculty may have roles outside their Department. Two examples are the Director of the University’s Writing Lab and the Assistant Director for the University Honors program.

5. The final two narrative boxes under the standard paragraphs on Specific Assignments and Performance Evaluation are to be used in the event that there are any other special circumstances in the work assignment that might affect these areas.

G. Save the letter draft, then View the letter to check the content before submitting the letter into the system for signatures. Note that the path within RouteIt varies by College.

H. The Letter Tracking site (listed just below Build/Edit Assignment Letter) allows you to check on where the letter is within the system. If for some reason a letter needs to be edited, you can begin the second version via the Copy to New Letter button, which will automatically populate the new version to allow easier editing. Once the letter status is noted as Completed (signed by all necessary parties), you can select View Letter in order to print file copies, if needed.

The following pages provide a view of the CAERS home site, the letter build page, and the example blank letter template:
Welcome to the Combined Activity/Effort Reporting System
To process your Activity/Effort Report:
1. At the left, click on Summary CAER to view a summary of pre-entered course and sponsored research/programs information.
2. Click on Credit-Generating Activities to review course detail and to add information for service on Thesis/Dissertation Committees and supervision of Cooperative Education students.
3. Click on Non-Credit-Generating Activities to add information related to Advising, Scholarship and Creative Activities, Service, Professional Development, and so forth.
4. Click on Sponsored Research/Programs to review grant/contract activity detail and to adjust actual percentages of effort.
5. Return to the Summary CAER to review changes you made and to submit the Report.

To report errors in pre-entered information use the "Report Errors" links in the Credit-Generating and Sponsored Research/Programs sections.

Spring 2013 CAER submission deadline is Aug 30 2013
Assignment Letter

2012-2013 Letter Creation

Notes:
- "To" person: the information is pulled from Banner. If the person's title is incorrect it may be modified by inputting the correct information and saving the changes.
- "From" person: the person's title may be modified if incorrect. If the person is incorrect, in the next line, enter the Argonet Username or Banner ID of the person who should be in the "From" line.
- The text in the subject line for the letter may be modified.
- Contact hour boxes are required. Removing the value will result in the assignment of 0.00 contact hours.
- All "Additional Narrative" boxes are optional.
- The four "Non-Instructional Activities" categories may be included or excluded.
  - A checkbox in the checkbox to the left of a subcategory heading indicates that the subcategory will be included in the letter.
  - To exclude a subcategory, click on the checkbox to remove the checkbox, then save the changes.
- Changes must be saved prior to clicking on "View the Letter." Changes will be lost if not saved prior to leaving this page.
- Go to "View the Letter" to review a draft of the letter. From there the final letter may be submitted for approval. The letter will be routed in a pdf format.

The University of West Florida
Faculty Assignment Letter
(version 2)

To: Dr. Bob Yaeger
Assistant Professor

From: Dr. Michael T. Huggins
Interim Dean

Or you may change the "From" person by entering the Argonet Username or Banner ID of the new "From" person:

Subject: 2012-2013 Work Assignment

Introduction
The statements below are to confirm your assignments of duties and responsibilities for the 2012-2013 contract period. It is understood that on the basis of departmental needs and priorities this initial assignment of duties may be revised during the course of the contract period. Such revisions will be confirmed in writing.

Each semester your workload must be equivalent to at least twelve contact hours for a full-time appointment. This is a requirement of Florida Law. Usually, this will require a minimum of three "three-semester-hour" classes (nine semester hours) of instruction as well as your other assigned duties.

The following sections of this document present minimum expectations regarding your responsibilities and duties for the contract period. You are expected to comply with the assignments appraised in this letter as well as the guidelines set forth in the UWF/UFF Collective Bargaining Agreement and applicable UWF employment policies.

Instruction
You are expected to teach these classes assigned to you, which may vary in delivery mode, location, and course level; supervise internships as needed; supervise theses/dissertations as needed; provide instruction in directed studies as needed in accordance with departmental policies; provide course-related consultation with students as needed; maintain posted office hours in accordance with departmental policy; perform duties usually associated with instruction, such as regular class preparation, necessary development and revision of course content and materials to maintain professional currency, appropriate testing and evaluation of student performance, prompt and informative exchange of graded materials, maintenance of class records, and (when needed) development of new courses and course documentation. It is expected that classes will be conducted during the time specified by the University. Absences for both face-to-face and online courses require reasonable substitute activities, and should be reported to the department chair in advance of the absences.

Courses will be planned and taught in order to encompass:
- Relevant program level student learning outcomes communicated to the instructor by the department as they are outlined in the Academic Learning Outcomes for Bachelor's Degree Programs and Academic Learning Outcomes for general education and graduate programs.
- Course-level student learning outcomes as established and communicated by the department, college, and university.
- Assessment instruments and assessment data documenting the achievement of learning outcomes as established and communicated by the department.

Requests for release from your formal instructional assignments must follow official departmental procedures.

https://nautical.uwf.edu/utility/activityReporting/main.cfm?action=letterBuild
0.00 Instructional Contact Hours for Fall semester

Additional Narrative:

0.00 Instructional Contact Hours for Spring semester

Additional Narrative:

Non-Instructional Activities

You are expected to engage in at least 0.00 contact hours for non-instructional activities in the Fall and 0.00 contact hours for these activities in the Spring.

Additional Narrative:

Advising

You are expected to conduct academic and career advising of students, including being available for consulting with your own advisees, special students, potential new students, and advisees assigned to absent colleagues; preparing and updating degree plans as requested by the chair; and knowing and communicating requirements for program completion and graduation.

Additional Narrative:

Scholarship and Creative Activities

In the area of research, creative, and scholarly activities you are expected to enhance your scholarly professional status and contribute to your profession. This may be accomplished through publications, grants, contracts, papers presented at professional meetings, or other activities described in the department’s approved statement on scholarship and creative activities. Where appropriate, you may lend your expertise to the university community, your profession, or the community at large.

Additional Narrative:

University, Public, and Professional Service

You are expected to render duties as may be assigned consonant with usual expectations of a faculty member, which may include assisting with review and development of curriculum and/or the writing of grant proposals that enhance the mission of the department; attendance at and collegial participation in university, college, and department meetings and special events; participation in university governance; and other contributions to the mission of the University, college, and department. As part of these expectations, you are encouraged to participate in Commencement Ceremonies.

Additional Narrative:

Program Coordination or Administration

You are expected to perform any other duties specifically negotiated in relation to support of college or departmental initiatives or projects.

Additional Narrative:

https://nautil.ual.edu/util/activityReporting/main.cfm?action=letterBuild
Specific Assignments, Summaries of Assignments, or Further Explanations of Assignments in Above Sections, etc.
You are expected to maintain your academic and/or professional qualifications as outlined in your college’s policy on academic and professional qualifications.

Additional Narrative:

Performance Evaluation and Reporting of Activities
Please be aware that your performance will be evaluated based on the assignments presented above. You are expected to report your activities as part of your Annual Faculty Evaluation. You are also required to submit in a timely manner, following each term, a report of your activities and efforts using the online Combined Activity/Effort Report in compliance with Florida and federal statutes and regulations and University policies.

Additional Narrative:

Salutation
If you have questions or concerns about your assignments, or if your activities change during the term, please notify me so that we can update this assignment letter.

- Changes must be saved prior to clicking on "View the Letter." Changes will be lost if not saved prior to leaving this page.
- Go to "View the Letter" to review a draft of the letter. From there the final letter may be submitted for approval. The letter will be routed in a pdf format.

Save Changes  View the Letter
CAMPUS DIRECTORY

Description and purpose: The Campus Directory is located in MyUWF and has multiple functions as a source of information on personnel and links to UWF offices. The Directory is divided into three subdirectories (Departments, Organizations, and People), which can be accessed through tabs indicated on the top bar of the site. There is also a Search tab on this bar, which allows you to search the entire directory, but each of the subdirectories has its own Search function.

Departments

Clicking on the Departments tab brings up an A to Z bar used to select a particular section of the full Departments listing. On the left hand side of this bar is a Search icon for searching the Departments directory. Next to this is an Organizational Chart icon, which lists all departments by their placement within the six university divisions (Academic Affairs; Business, Finance, and Facilities; Executive Vice President; President; Student Affairs; and University Advancement).

Click on any of the letters of the alphabet (those in grey tone indicate that there are no Departments beginning with that letter) to obtain a listing of all departments in the University beginning with that letter. Each line of the list provides the name of the department, its building location, and main telephone number. There are also a series of icons on the left-hand side of each line.

A. The heart icon allows you to indicate favorite sites for quicker access.
B. The icon provides the primary directory listing for the Department, providing again the location and phone number, a link to the website, and the primary Department personnel (such as the Director or Chair of the office and main administrative staff), and another link to a full employee listing.
C. The icon lists all staff within the Department with their email address and phone number. Click on the name to access a full directory entry with position title, email, phone number, and campus address. This listing might also include home address and phone number and organization memberships, if provided.
D. The icon provides access to a Department’s Intranet page, if one exists. These sites provide functions and information available only to University staff. Many forms and procedures are accessed only through these sites, though there may also be individual channels for some activities directly available in MyUWF.
E. The icon provides the link to the Department’s main web page, which can also be accessed through the UWF main page. This provides general information provided to the public, not just to University personnel.
<table>
<thead>
<tr>
<th>Department Name</th>
<th>Building</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean of Students</td>
<td>21 / 130 (474-2384)</td>
</tr>
<tr>
<td>Declining Balance Card</td>
<td>020W / 162 (474-3324)</td>
</tr>
<tr>
<td>Development</td>
<td>12 (474-2712)</td>
</tr>
<tr>
<td>Development Office</td>
<td>12 (474-2712)</td>
</tr>
<tr>
<td>Dining Services</td>
<td>22 / 133 (474-3197)</td>
</tr>
<tr>
<td>Disabled Student Services</td>
<td>19 / 100 (474-2387)</td>
</tr>
<tr>
<td>Diversity and International Education and Programs</td>
<td>71 (474-2479)</td>
</tr>
<tr>
<td>Diversity Programs</td>
<td>71 (474-2479)</td>
</tr>
<tr>
<td>Division of Anthropology &amp; Archaeology</td>
<td>13 / 131 (474-2797)</td>
</tr>
<tr>
<td>Door Access</td>
<td>020W / 162 (474-3324)</td>
</tr>
</tbody>
</table>
Organizations

The Organizations tab also brings up an A to Z bar with Search and Organizational Chart icons. This listing provides access to all governmental committees and other groups that serve a range of functions within the University, such as the Faculty Senate, Graduate Council, or Retired Employees Association. The chart icon presents a full listing of organizations providing their relationships to other committees and groups. Note the tab on the far right where you can select listings that include all organizations or only those presently active.

Click on any of the letters of the alphabet to obtain a listing of all organizations beginning with that letter. The listing provided gives a link to the web page for each group. These pages provide information on membership, meetings, meeting agendas, minutes, and reports. These pages vary according to the specific functions provided by the organization.

People

The People tab provides the search function for the basic University directory listing of all employees and students. Each listing provides name and email address. Click on the name to access a full directory entry with position title, email, campus number and address, if the person is an employee. The student listing will provide email address and home phone and address, if allowed by the student.
CASH TRANSMITTALS

Description and purpose: Some Departments have functions that involve an influx of funds from outside of the general funding provided by the State of Florida and tuition fees. This can include, for example, Departments who host events or performances that required entry fees; i.e. plays, recitals, concerts, or academic conferences. This revenue is only allowed to be placed in funds designated as Auxiliary, which will have a separate Index Number from the main Departmental budget account (see Budget Transfers section).

If the contributing organization or person provides a check or cash directly to the Department, rather than via ticketing through UCSI (University Commons and Student Involvement), a Cash Transmittal form must be submitted to deposit the funds into the department’s Auxiliary account. The Department Administrator is required to go through specialized training to gain authorization for submitting cash transmittals and must review and acknowledge with a signed form the Cash Collection Policy.

For complete information obtaining the required authorization see the following link on Cash Collection on the Financial Services website:

http://uwf.edu/offices/financial-services/departmental-areas/cash-collection/

Contact: Linda Howard, Assistant Controller (lhoward@uwf.edu x2120)

A. Select the Cash Transmittal Form app in MyUWF. (Warning: Some internet browsers do not work well with this system, for best results use Internet Explorer.)
B. A form will appear populated with your name, date, and department.
C. Fill in the name of the person or organization providing the funds, what the check is for (includes Banner Index code and object code), check number, and amount. Check with your Business Manager if you need assistance with proper codes.
D. If the “For” section of the form takes more than one line (description, index and object codes), but there is only one line needed to indicate a single deposit amount, you must place a “-“ under the first column (“Name of Remitter”) to ensure each line is printed on the form.
E. Once all information is complete, click the Continue button above the data input list.
F. A preliminary form is provided so you can check that all information is correct.
G. When you transmit, a PDF form is generated. Print this form and make a copy for your files. (NOTE: Do not hit the transmit button more than once, this will generate two transmittals, then you would have to request the duplicate be deleted from the system.)
H. The original check and a copy of the transmittal form should be hand carried to the Cashier’s Office to finalize the process. The Cashier’s Office provides a cash receipt for your files.
Contact: Financial Services
http://uwf.edu/financial/internal/CashCollection_DeptPolicy.pdf
CUSTOMER INFORMATION CONTROL SYSTEM (CICS)

Description and purpose: CICS (PMEN) is the original software system for student records utilized by UWF and all other universities in the state system. This software was replaced with Banner Student in the Fall 2014 semester. You can view information in CICS such as student registration (through summer 2014), student address, phone number, date of birth, graduation information, SASS audits, test scores, transfer course work, grades, holds, degrees awarded, etc.

All CICS information is now available for current students in the Banner system.

A cross list between information provided on CICS screens versus Banner forms is provided in Confluence on the site titled Finding CICS equivalents in Banner: https://confluence.uwf.edu/display/BPL/Finding+CICS+equivalents+in+Banner
CLASSROOM SCHEDULER

Description and purpose: Classroom Scheduler is the web-based scheduling system used by the University for setting classroom use and requesting and scheduling special events. The software system is called Series 25 or 25 Live. Detailed instructions on using the site are also available in Confluence at: https://confluence.uwf.edu/display/BPL/Searching+for+Room+Schedules

Any events or classroom use requested via this site are reviewed by Kendra Loucks in the Registrar’s Office (khoucks@uwf.edu, 474-3389). Any classroom use must be authorized by the Registrar’s office.

Searching for Room Schedules

A. From MyUWF, search for the Classroom Scheduler app. Be sure to Log in to the Series 25 system using your ArgoNet login by clicking on the Sign In link on the top right corner of the page.

B. After logging into the system, go to the blue Location tab. Search for your building/room using 4 digits for the building number, followed by a space, then 4 digits for the room number.
C. Click on the room result that you are looking for (the number indication in blue in the Name column). This provides a room use matrix for the current week, indicating each class time, shown on the Availability tab. Place the cursor over a specific block to obtain details about the classes.

- You can change the date range for the matrix by clicking on the dates noted in blue just below the room number in the Dates box and expanding the range, then click Update Calendar.
- The Calendar tab provides the same information in calendar form.
- The List tab gives the course information on all classes using the room during the time frame selected.
- The Details tab provides a listing of the technology available in the room, the room layout, and capacity.

D. A full detailed description of a class or event can be viewed with the Calendar. To get more information about the class, click on the blue Event name. The next window will display the instructor, dates, etc.
E. To request use of a classroom during an open time, click on the selected time slot on the Availability tab matrix. This will connect you to the Event Wizard tab in 25 Live, where you will be prompted to enter your event details per the instructions noted below.

Creating/Scheduling an Event

A. In MyUWF, select the Classroom Scheduler app and sign in using your ArgoNet information, then follow instructions below.

Many times reservation requests begin with a desired date and time, but you are unsure of the room. To search for an available room based on the desired date and time, click on the "I know WHEN my event should take place-help me find a location") link.

B. The link will update and allow the user to enter in the desired date, time, and number of attendees. Under the Search within drop down box, select the ACAD room option as the location. (Note: This drop down option does not work with all browsers. However, the available rooms are still listed when you select the Show me what's available button, which will then list rooms from all campuses.)

C. Once the information has been populated, all available rooms will be listed. Typically, it is best to try and find a room as close to the host as possible, and still meets their needs. Placing the cursor over a room designation provides more particulars about the space (location, size, capacity, and available technology).
D. Once you have chosen the room, the reservation needs to be recorded. From the available list of rooms, click on the **Use the location** link next to the desired available room. *(NOTE: It is advisable to double check the availability of the location in Banner INB with the SSAMATX form, see the subsection on searching for Rooms Schedules using Banner, which directly follows this section on events.)*

The next screen should take the user to the reservation screen:

![Reservation Screen](image)

E. Fill in the Event name, and select the event type. For the **Primary Organization for the Event**, click on the drop down arrow and select **Browse**. From there you can either select the **Index** option to see a list alphabetically or type it in the search box (keep in mind it must be exact). Choose the department or Organization that best fits the reservation (these appear to be set by course prefix subjects). For example, during the summer, ITS reserves rooms for maintenance. If the room is being reserved for ITS maintenance, then
it would be appropriate to select "ITS Maintenance" from the list. If there is more than one organization, then also enter in the second organization information. Click Next.

F. The expected Head Count should be prefilled, if not you may enter it here or select, I Don’t Know. Then enter the event description. Click Next.

G. Select if the event have more than one occurrence or not. Click Next.
H. The time and date information should already be pre-filled. Select if the “Setup or Pre-Event” or “Post-Event or Takedown” will be required. Click Next.
I. The location you selected earlier will be on the right hand side of the page. (You should see the room information with a green check mark beside it.) Click Next.

If you would like to select a different room, you may use the Find and select Locations option, then click Next.

J. On the Find and select RESOURCES” option, click Next. (You do not have to enter any information on this page.)

K. On the Select CUSTOM ATTRIBUTES for the event option, click Next.

L. On the Select CONTACTS for the event option, click Next.

M. Select categories for the event, or click Next.
N. Add any additional comments and notes for the event if applicable. Click Next.
O. From the **Event State** menu, select **Confirmed**. Once you select the Event state, click **Save**. Kendra in the Registrar’s Office will then approve or disapprove the request. This information will show on the requestor’s home page.

```
<table>
<thead>
<tr>
<th>Event State</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Draft</strong></td>
<td>Your Location and Resource selections will be saved as preferences until this event is changed from its Draft state.</td>
</tr>
<tr>
<td><strong>Tentative</strong></td>
<td>The event is scheduled, but is awaiting Confirmation from its Scheduler.</td>
</tr>
<tr>
<td><strong>Confirmed</strong></td>
<td>The event is scheduled and confirmed. Set as your default Event State.</td>
</tr>
<tr>
<td><strong>Sealed</strong></td>
<td>This event is finalized and cannot be edited or changed without sufficient permissions.</td>
</tr>
<tr>
<td><strong>Denied</strong></td>
<td>This event has been denied, and all Location and Resource reservations will marked as cancelled.</td>
</tr>
<tr>
<td><strong>Cancelled</strong></td>
<td>This event has been canceled, and all Location and Resource reservations will marked as cancelled.</td>
</tr>
</tbody>
</table>
```
To Search for Room Schedules Using Banner

A. From the Banner main page, go to SSAMATX
B. Type in the room you are looking at, be sure to use four digits for the building and 4 digits for the room. Then, press either F8 or click on the Query button. This will display the results of the time, day, and CRN number. If you are looking at a specific class.

C. If you would like more information about a section, copy the CRN number. Go to SSASECT and type in the semester and CRN number. The Meeting Times and Instructor tab will show the meeting information.
CONFLUENCE

Description and purpose: The Confluence app in MyUWF is the UWF Business Process Library (BPL) created by the IT office. It is designed to be a repository of procedural information at all levels of university process. The library is interactive, in that each site provides blog and comment sections for feedback on the usefulness of the information provided.

The site is accessed through your ArgoNet login and can be personalized with site favorites for process information most needed in your job requirements. Go to the drop-down menu on the Tools tab on any Confluence site and select Favorite. This location in Confluence will then be listed with all other Favorite sites, which are then accessed through the drop-down menu from the Status icon (far right tab of the blue headline bar on the Confluence page).

When requesting how-to instructions on Banner Production functions and for most other office procedures in this document and other information sources, you will be sent to links on the Confluence site.

You can access the various business processes pages via an alphabetical listing by label from the BPL Home page or via the Search function.

Confluence is also a repository for Guides published by various offices on campus; i.e. Academic Advising, Deans and Chair Guide, Record and Registration; and this handbook. Many of the procedural manuals linked in this document are also available in Confluence, such as the Graduate School Manual, ITS Office Procedures, Office of the Registrar, and so on.

For a complete listing of items and sites provided in Confluence see the BPL home page: https://confluence.uwf.edu/display/BPL/Business+Process+Library+Home

For more complete information on using the library see: Getting Started with Confluence

Contacts in ITS:

Melanie Haveard, mhaveard@uwf.edu, 474-2540

Geri Genovese, ggenovese@uwf.edu, 474-2805

Jenae Burkart, jburkart@uwf.edu, 474-2093
COPY SERVICES

Description and purpose: Photocopying services for the University are administered through the Business Affairs office in Building 20W. Every building on campus is equipped with at least one copier machine leased from an off-campus provider. For basic information on the service, see the Copy Services web page at the following address or by selecting the Copy Services activity tab in MyUWF:
http://uwf.edu/copyserv/internal/

The use of the machines is authorized with your Nautilus card and copies are charged to your personal account or, for faculty and staff, to your resident Department. Access is requested via the form linked on the Copy Services page under the For UWF Departments link, select Copy Services Access Request Form. Department Administrators use the Access Removal Form link on this page to remove authorization for faculty and staff who are no longer employed in the Department.

Department Administrators are also responsible for keeping the list of staff and instructional personnel authorized to make copies with Department funds and for monitoring spending. Reports on the specific copy jobs by each card used to access the copiers are available through the PaperCut utility on the Copy Services page: click on For UWF Departments then select Departmental Accounts and Reports.

A. Sign on to PaperCut with your Argus UserName and password.
B. Click on the Accounts tab. Select the page number on which your Department’s records are found, then click on your Department.
C. Select the Job Log tab. This provides a detailed listing on all jobs charged to the Department.
D. To produce a monthly report, click Filter on and set dates for the first and last days of the month, then click on the Apply Filter button at the bottom of the filter window.
E. Scroll to the bottom of the first page of the jobs listing and click on Report based on above data.
F. Click the Generate Report button (leave the report particulars at their default setting).
G. The report lists each person who has jobs charged to the Department, the number of copies made, and the amount charged. The total at the bottom of the page should match the amount charged to the Department for that month by the Copy Services office.
H. You may save the report as a PDF file, or you can simply print it for your files. You may have to print at a reduced size (90%) to fit the entire report cleanly on to a single page.
I. Logout of PaperCut

Contact: Maera Bradberry, Business & Auxiliary Services, mcarr@uwf.edu, 857-6071
COURSELEAF/CATALOG MANAGEMENT

Description and purpose: The UWF Catalog is an online document found at http://catalog.uwf.edu. The catalog is maintained by the Curriculum Change Request (CCR) Catalog Coordinator in a program called CourseLeaf. Annually in the spring, you will be notified of training sessions on the CourseLeaf program for catalog updating using Mozilla Foxfire. Access to the CourseLeaf site is at https://nextcatalog.uwf.edu/ or via the MyUWF app CourseLeaf Administration. You and your chair will be asked to review the department’s catalog pages. Only those identified as AUTHORS will have access to “start the workflow” for changes to department catalog pages. If there are any issues or edits identified, you should contact your Chair. The new CCR/CIM (Course Inventory Management) process (beginning in 2014) will be linked to the catalog, making these changes seamless by taking in to considerations any CCR changes that have been made to courses or programs.

Contact: Carolyn Beamer, Office of Registrar, cbeamer@uwf.edu, 474-2228.
COURSE REQUEST SPREADSHEET

*Description and purpose:* Course scheduling is set each semester via spreadsheets submitted to Kendra Loucks (kloucks@uwf.edu, ext. 3389) in the Registrar’s office. At some point early in a given semester, the Registrar’s office will distribute the spreadsheet forms to each Department to complete with scheduling information for the following semester. Portions of the spreadsheet are populated with course information from the previous like semester (Fall 2013 course list for Fall 2014 spreadsheet).

Each box in the spreadsheet includes either a description of what needs to be filled in (click on the box and a description window appears) or a drop down menu of selection options. Please see the index below for additional instructions/descriptions.

Note that the **Section Number** (CRN) must remain blank until the Registrar has set the schedule. At that time, your spreadsheet will be returned with the section numbers in place.

Any courses/sections to be offered in the semester that do not appear on the spreadsheet must be added as new lines at the bottom of the spreadsheet.

Below is a section of a completed spreadsheet.

**Spreadsheet Instructions:**

If there is a course listed that you do NOT wish to offer for the upcoming semester, please use the drop down box in the column titled **Remove** and select the "X".

If the course is cross listed with another course/section, please indicate the section in the column titled **Cross List**.

For the **Instructional Method** column, please select one of the options: Distance Learning (all online courses), Hybrid Blend, Traditional (face to face), or Tech Enhanced (Tandberg style courses).

For **Special Approval** column, please select one of the 4 types of special approvals: CE (Continuing Education Approval), CO (Co-Op Education Approval), DP (Departmental Approval), or IN (Instructor Approval). **NOTE:** There may be a restriction already built or can be built rather than using the Special Approval tool. Restrictions lighten the registration work load previously conducted by departments.

**Part of Term** indicates the length of the course for the semester. Part of Term 1 indicates the entire term (use to be Term A), Term 2 is the first half (use to be Term B), Term 3 is the second half (use to be Term C), and Term 4 is the last three quarters of the Summer Term (use to be Term D for Summer). If selecting the **Other Term** option, please be sure to include the start and end date in the "M" and "N" columns.
Include the enrollment Limit for the section and select the desired Meeting Days and Times from the standard time blocks listed from the drop down box. If selecting the Non-Standard Time Block option, be sure to include the desired time block in the Notes to the Registrar column.

Please select one of the options listed in the Meeting Type column: CLAS

Instructor ID and Instructor Name both need to be filled out, indicating who will be teaching the course. If there is more than one instructor, please list all associated with the course. For the Overload/Volunteer column, please indicate if the section will be Overload for the Instructor or if the Instructor is NOT paid by the University by selecting the Volunteer option.
COURSE SEARCH

Description and purpose: The course search provides course information, including description, for all courses offered at UWF. Students should contact their advisor when developing schedules to ensure timely completion of prerequisites and courses required for graduation.

There are two methods used to search for courses offered by the University within a specific semester: through the Banner web portal Course Search in the SSB system (Self-Service Banner) or more directly through Banner INB (Internet Native Banner) forms.

Instructions for both avenues are provided in Confluence at: https://confluence.uwf.edu/pages/viewpage.action?pageId=2622334

Course Search in SSB

A. The Course Search function is located in the Faculty & Advisor Services app in MyUWF. From the Faculty Services tab, select the Course Search link.

B. From the drop down menu select the term for which you wish to look up available courses, then click Submit. (Note: the semester option may not always appear if you have previously selected a term).
C. Select and then enter your search criteria. Note that the subject code (course prefix) is required for all searches. The more information that is entered, the more specific the search, and the fewer options will be returned, for example: Select a subject and enter the course number to search by both subject and course number. If you wish to search for a particular criteria, but you do not know which specific subject codes to use (for instance to search for all courses within a particular time frame, or if you want to know which courses a particular instructor teaches) you can select all subjects in the listing. This is done by:
1. clicking on the first subject available,
2. holding down the Shift button on your keyboard,
3. scrolling to the bottom of the subject list, and
4. clicking the last subject listed.
All courses should now be highlighted.

D. Click the **Class Search** button.
E. The Course Search Listing will appear and all available course sections being offered that meet the criteria will then populate.
F. Click the course title noted in blue to get Detailed Class Information (i.e., Registration Availability, Prerequisites, General Requirements, Restrictions, etc.).

G. Click the View Catalog Entry link to navigate to the Catalog Entries page to see the course description and other information that applies at the catalog level (all sections of the course).
Course Search in INB (Banner Production)

When searching for an open course in INB that has at least one space available:

A. Go to the SSASECQ form in Banner Production.
B. Enter the desired term in the Term field and the CRN if known. If the CRN is unknown, you may search by subject and course number.
C. Enter >0 in the "Enrollment: Maximum" field on the far right.
D. Execute Query (F8).
E. All sections of the course with space available should appear.
F. Scroll down the page to view additional sections
CURRICULUM INVENTORY MANAGEMENT SYSTEM (CIMS)

_Description and purpose:_ CIMS is the software platform, which provides a web portal for requesting and processing all Curriculum Change Requests (CCRs) submitted by academic departments.

A Curriculum Change Request is prepared when a Department decides to make any change (addition, modification, or deletion) to department courses or degree programs. Course changes can involve the title, credit hours, or catalog description changes or requests to delete or build a new course. CCRs are also prepared when creating a new program or for program modifications.

Typically, the Chairperson of the department will input the CCR information. If a Department Administrator is to prepare the CCR form in CIMS, the information required on the form (rationale, course description, topics, student learning outcomes, texts, and grading) should be provided by the appropriate faculty members.

The CCR process takes approximately a full year of committee work before any are completely approved and the CIMS system provides a means to monitor the progress.

Contact: Carolyn Beamer, Office of the Registrar, cbeamer@uwf.edu, 474-2228.

**Course CCR’s**

- **A. New Course:** A new course offering developed by the department. It goes through a complete review process. The new course does not yet have a permanent course number. Instead, the last three numeric digits on the CCR form are indicated with XXX (e.g., ART 4XXX, ECO 5XXX)
- **B. Course Modification:** A change that a department wishes to make to any course that has a permanent number and is listed in the catalog. Changes can be such things as course descriptions, prerequisites, student contact hours, etc.
- **C. Course Reinstatement:** The course has a permanent number and was once taught at UWF. It was deleted from the Catalog and now the department wishes to reactivate it. This CCR option is not offered for programs.
- **D. Course Deletion:** The department no longer wishes to teach this course and it will be deleted from the catalog.
Program CCR’s

1. **New Program**: A new degree program developed by the department. It goes through a complete review process.
2. **Program Modification**: A change that a department wishes to make to any existing degree program. Changes can be such things as introducing new or altered course requirements, Student Learning Outcomes, or new admissions requirements.
3. **Program Deletion**: The department no longer wishes to offer a specific degree program.

Procedures and Sub-Processes for Creating and Modifying CCR’s

The following links take you to Confluence for instructions on the various components in the submission process. Links are in alphabetical order, not in order of steps.

- Approving CCRs in the Curriculum Management System (CIMS)
- Changing a course number or level in the CCR process in CIM***
- Creating a new course in the CCR process in CIMS
- Creating a new program in the CCR process in CIM
- Deleting a course in the CCR process in CIM
- Deleting program request in the CCR process in CIM**
- Modifying a course in the CCR process in CIM
- Modifying a program request in the CCR process in CIM**
- Reinstating a course in CIMS

Special Course (X990) CCR

An x990 or 990 is a special type of Course CCR used to schedule a course offering that does not appear in the catalog and will be offered only for a limited time frame. An x990 is either offered by a department to:

A. “test” a new course topic to determine if there is enough interest to then build a new course,
B. a New Course CCR is in progress and the department wants to offer the course before a permanent number is assigned.

A 990 or Special Course may be offered for 3 times and then a **New Course CCR** must be submitted to give it a permanent course number. A 990 does not carry over to the next semester. If a department wishes to offer the course again, a new 990 must be submitted.

Procedures and Creating the Special Course CCR’s

A. Go to the **990/Special Topic Course Request** app in MyUWF.
B. Click Login to CCR System in the upper right corner to access the CCR System. This system predates CIMS and is used to request the 990 courses and as well as provide archival data on CCRs prior to the 2014 change to CIMS.
C. Select **Begin a 990**, then click on **Create a New x990** or **Create a x990 from a CCR**

Fill information in as you go from page to page (course description, topics, student learning outcomes, texts, and grading). If you are creating a 990 from an existing Course CCR, the various required information blocks on the course are automatically populated from the corresponding sections on the Course CCR.

D. On the very last page, you will **Submit**. The request is sent electronically to your Chairperson. Your Chairperson will receive an email letting him/her know there is a request waiting for their approval. After your Chairperson approves, the request will go to the Registrar’s Office for approval and scheduling.
E. Select **Current 990 List (View/Edit)** to track the progress of your current 990 CCRs through the approval and scheduling process. You may also obtain a printable view of the CCR for file copies or make edit changes, as necessary,
DEGREE WORKS

Description and purpose: Each Degree Works audit is unique to the student and their major program, so the particulars for reading the record relate to the student’s class history and the specific program requirements. The Degree Works audit is available for student use to aid them in determining progress in their major and by Department Advisors in tracking transferred coursework and establishing program requirement exceptions. All data appearing in the audit are derived from information pulled from the Student Banner INB database system.

Contact: RayeAnn Sherrill, Office of Registrar, rsherrill@uwf.edu, 474-2246

Viewing Process

A. Select the Degree Works app in MyUWF.
B. Click the View Degree Works Audit link (available only to staff designated as advisors).
   1. Input the student’s ID#, or if the number is not known, click on the Find icon. Enter the student’s first and last name and click Search.
   2. A list of students with that name will appear in the Students Found section at the bottom of the Search screen. Unselect the students you do not want by clicking on the box to the left of the ID#.
   3. Click OK.

4. The audit is divided into sections showing various University and degree requirements beginning with an initial section that states the specific major and lists the requirements:
   - Active Catalog
   - Minimum GPA
   - General Studies
   - Multicultural and Foreign Languages
• Summer Enrollment
• Academic Standing
• Program
• Program GPA

A box outlined in red appears by each of these, which is then filled in green with a check mark as the student meets the requirements. A blue box with a “~” symbol inside it signifies that the required coursework is “in progress” for the current semester and will be replaced with a checked box once the required grade is achieved at the end of the semester. (There is a Legend near the top of each audit, explaining these icons and other notations that occur on the page.)

The other sections of the audit delineate the specific course requirements for General Studies, Gordon Rule, Multicultural and Foreign Language, Summer Hours, Program requirements specific to the major, and Minor requirements, if the student had declared a minor.

Within each of the requirement sections, the audit provides a list of course requirements (or subsets of courses, if there is an option of more than one course for meeting a requirement). These are each marked with a check as a requirement is met. Once met, the audit notes only the specific course taken by the student that meets the requirement.

NOTE: It is advisable to always select the Process New button (on the third line of the audit page) when working on a degree audit (date of last audit is noted the last block on the first line). This assures that all exceptions are in place and that any changes made to the student’s record or the program audit rules coding are reflected in the view.

C. The final sections of the audit provide other information pertinent to graduation, but not referencing the program itself:
1. In-progress – Currently enrolled classes.
2. Courses Not Applying to this Program – Courses taken but are not being used to meet the requirements of the specific degree. These are essentially electives.
   NOTE: If an advisor is using this section to help certify students for VA or athletics or other such purposes, a course may be used in the “summer” requirement and not appear in this section.
3. Insufficient – Courses with insufficient grades or are being repeated and, therefore, not earning credits.
4. Not Counted – Courses that are coded as non-degree seeking or are considered “too old.” (Masters level classes are not counted after five years.)
5. **Exceptions** – Any special circumstances for meeting requirements other than those listed in the audit are set by Advisors or the Registrar’s office and are listed in this section. They are also noted within the audit section where the requirement is listed. (Instructions on entering exceptions are provided below.)

D. To obtain a printed version of the audit for your files, click on the work **Print** located in the top grey line of the page, just below the University of West Florida header line.

**Advising Functions**

A. **What-If**

Advisors can provide a **What-If** audit for students who are thinking about a possible change of major. This feature allows you to select a new program to see how a student’s current class history would fulfill those requirements.

If you know the type of degree, such as B.A., the list of programs will be filtered for that type. Or simply choose from all possible programs.

Once you have selected a program, click on **Process What-If**.

![What-If Audit](image)

B. **Double Major**

If a student has two majors, both will be listed in the initial block of the audit and each program will have a separate section for its unique requirements.
C. Dual Degree

If a student is pursuing dual degrees (e.g., B.A. and B.S.) there will be two separate audits in the system. To select between the degree audits, click on the Degree drop-down menu adjacent to the Student ID and Name blocks in the DegreeWorks header line.

D. Alternate Views

When you select an audit for the particular student, the default view is the Student View, as noted in the Format button at the top of the Degree Checklist tab (second line of the DegreeWorks page). This is the version that is presented to the student. Several other views are available for advisors that can provide additional information about the student’s academic progress and options.

You can choose an alternate view by clicking on the drop-down arrow on the Student View button, selecting a view, then clicking the View button immediately to the right.
Registrar Report – This report allows an advisor to view the courses, which may be used to complete any degree requirement. If a course is not applying the way the advisor thinks it should, one can see if the course is in the list. It shows the underlying coding for the Student View of the Report.

Registration Checklist – Provides an abbreviated audit that presents only those particulars on requirements that are unmet.

Student Data Report – This view displays the information, which has been bridged from Student Banner. This view provides the basic demographic data, goal information (degree/program), UWF course history, transfer class information, and test data and previous degrees awarded, if any.

The course transfer information included here provides the required particulars needed for completing a Request for Evaluation of Transfer Coursework form for the Registrar’s office (available as an app in MyUWF). These forms are used to identify a transfer course to be used as a substitution for a degree requirement for a specific student, or to establish a UWF equivalent to be applied to all future students with this specific course on their record.

DegreeWorks Exceptions

Exceptions are special circumstances for meeting requirements other than those automatically posted in the audit. These are set by Department Advisors or the Registrar’s office via the Exceptions tab, located at the top of the DegreeWorks page.

A. On the Exceptions page, click on the Exception Types drop-down menu and select a type, then click Load.
   1. Force Complete – Is used to designate completion of a requirement that does not involve coursework, e.g., exit surveys, portfolio submissions, competency tests.
   2. Substitute – This substitutes one UWF course for another in order to meet the requirement.
   3. Also Allow – Is used to substitute a transferred course for the UWF requirement.
   4. Apply Here – Allows the use of a UWF course for a requirement that is not normally designated for this purpose.
   5. Remove Course/or Change Limit – This changes the requirement for a particular student, equivalent to the waiver from the PMEN system.
NOTE: If there is a minimum grade condition on the requirement and you are using a course currently In Progress, include the grade qualifier from the drop-down boxes following With (on the second line of the exception window). For instance, designate DW Grade Type then select equal to or greater than with a minimum allowable letter grade note in the box.

B. Course information

Scroll through the audit to find the course to be used for the requirement. Click on the course. This will automatically fill the Subject and Course number boxes in the Also Allow section of the Exception window.

C. Requirement

Scroll through the audit to find the requirement to be met by the designated course. Select by clicking on the radio button to the left.

D. In the Description field enter a specific description of the exception. For example, if it is a transfer course substitution (Also Allow), enter the transfer school initials, the transfer course information, then, what UWF course is being replaced.

The Registrar’s office can use exception management as a tool for adding equivalencies to Banner, adding scribing in the background for your program, and help repair exception errors.
E. Click **Add Exception**, then **Run New Audit**

Review the audit to ensure the exception applied as you expected. If it did not, remove the audit, and redo the exception.

It is also advisable to return to the **Student View** page and click **Process New** to update the audit record. The Exception should now be noted within the audit at the particular requirement designated in the exception.

And, the Exception will also be noted at the bottom of the audit under the Exceptions section.
DEPARTMENTAL ADMINISTRATOR LISTING

*Description and purpose:* Departmental Administrators, among other things, manage the employee list for their department. The employee list determines who will be included in the Calendaring and Email groups for a given department as well as who is listed as an employee when a user clicks the Employee Listing link on the department information page (e.g. [Academic Affairs Employee Listing](#)).

**Instructions**

A. Changes or additions should only be requested by Department Head or designated representatives for the respective departments.
B. View the list below to determine who the current departmental administrators are for each department.
C. Click the department name below to request addition/deletion of administrators.
D. Change requests will be processed in 1 to 3 days, and the requestor will be notified via email when the changes have been implemented.

[List of DIA’s by Department](#)
DEPARTMENT INFORMATION ADMINISTRATOR (DIA) RESPONSIBILITIES

**Description and purpose:** Department Information Administrator (DIAs) are designated for each UWF department. DIAs are responsible for maintaining the department information listed below. This information must be maintained in order for UWF information systems to work properly.

DIAs in Academic Affairs should follow the organizational change procedures defined by the Office of Academic Affairs in addition to those outlined below.

**List of DIA’s by Department**

**Instructions**

**DIA Responsibilities**

A. Update information displayed for the department listing in the Campus Directory.
   - **Instructions.**

B. Update the departmental staff membership list as employees are hired into or leave the department.
   - *Employees must appear in the staff membership in order to access certain online resources including Confluence and Tableau, to receive emails and calendar invitations addressed to the department as a whole, and to be listed as a member of the department in the Campus Directory.*
   - **Instructions.**

C. Notify ITS (by submitting an ITS Request Form in MyUWF) of changes to department names or department hierarchy.
   - **View the current department hierarchy.**

D. Notify ITS (by submitting an ITS Request Form in MyUWF) of department head changes.
   - *Department heads must be on file with ITS in order for RouteIt to contact the correct person when the approval of a department head is required.*

E. **Academic department heads on file with ITS receive access to assign advising PINs for all students.**
   - **List of department heads on file with ITS.**

F. Manage group memberships that are administered by the department.
   - **Instructions.**

G. Request changes to the department's MyUWF content and request MyUWF app features.
   - **Details and instructions.**
DIRECT PAY REQUEST

Description and purpose: The person or business stated on the Direct Pay Request as the vendor/payee will receive a UWF check in payment for goods and/or services that have been provided by the vendor or as a reimbursement to the payee for previously paid-for goods and services that benefit UWF.

Direct Pay Guidelines

A. Overview -- The University of West Florida (UWF) Financial Services Office is permitted to make direct payments for certain expenditures without prior approval from the Procurement & Contracts Manager. Obligations eligible for this type of payment are listed below.

B. Expenditure Guidelines -- Authorized personnel are expected to exercise good judgment in the approval of expenditures. The following factors should be considered when reviewing expenditures for approval:
   1. appropriateness;
   2. sensitivity to the values of UWF;
   3. effect of certain types of expenditures upon the public image of UWF;
   4. overall purpose to be served; and,
   5. availability of funds.

C. Allowable Expenditures -- Expenditure guidelines are outlined below. Please note that the department is responsible for directing the vendor to the external Vendor Registration Page for completion of the vendor registration process before submitting the Direct Pay Request Form to Accounts Payable. Only UWF employees and students receiving reimbursement for expenses do not need to complete the Banner Vendor Information Form. If a UWF employee or student employee is providing a service, forward an action sheet to Human Resources. The following should be submitted on a Direct Pay Request regardless of the total dollar amount:
   1. Subscriptions - magazines or other periodicals that cannot be paid with a UWF PCard (MasterCard);
   2. Memberships - that cannot be paid with a UWF PCard (MasterCard) (See Membership Dues Instructions.)
      a. Requires an Open Records Certification Form (ORC) (PDF) form completed by the organization, be on file with Financial Services.
      1. View the List of ORC Forms on File (PDF)
         2. If the organization is not listed, the requesting department must obtain the statement and submit it with the Direct Pay Request.
      b. The organization’s attachment (i.e., renewal notice, application, etc.) must be completed by the department.
   3. State Insurance Premium Payments and Remittance of Other Related Payroll Liabilities
   4. Postmaster Payments - including bulk mailing, box rental, and metered mail machines
   5. Medical Expenses - for injuries incurred while on athletic trips not covered by insurance
   6. All Approved Concession Payment Requests
   7. Licenses/Permits - or others fees imposed by a governmental entity
   8. Fees required for Accreditation or Certification
9. Allowable Reimbursement for Expenses Other Than Travel – Purchase and reimbursement of any single item exceeding $1000 is **not allowed**. Any single item exceeding $1,000 must be acquired through the Requisition/Purchase Order process.

10. The purchase of allowable goods and services less than $1,000 should be submitted on a Direct Pay Request:

11. Purchases of $1,000 or more must be processed on a Banner Requisition. If vendor requires payment in advance, a Purchase Order with payment terms of cash with order will be issued.

12. Purchases cannot be split to avoid the limit.

13. Documentation from the vendor indicating that Visa credit card and Purchase Orders are not accepted.

**D. Allowable goods and services include but are not limited to:**

1. Catering - with approved UWF contractors
   - a. For Auxiliary funds, fees must have been collected from the participants for the expense. The expense may not benefit UWF employees.
   - b. For Sponsored Research funds, the expense must be specifically authorized in the grant and proof included with the Direct Pay Request.

2. Food
   - a. For Auxiliary funds, fees must have been collected from the participants for the expense. The expense may not benefit UWF employees.
   - b. For Sponsored Research funds, the expense must be specifically authorized in the grant and proof included with the Direct Pay Request.

3. Background Screenings

4. Entertainment Contracts
   - a. Requires an original contract with appropriate approvals.

5. Athletic Game Officials

6. Non-Employee Stipends
   - a. One payee per Direct Pay Request

7. Research Subject Payments
   - a. One payee per Direct Pay Request

8. Advertising Invoices - when a UWF PCard (MasterCard) cannot be used
   - a. Requires a tear sheet as proof of publication.
   - b. Human Resources must approve the ad wording for position vacancies prior to placing the ad. Documentation of prior approval must be attached to the Direct Pay Request.
   - c. Print advertising must meet UWF graphics standards by approval of the Marketing and Publications Department. Contact: Joy Ward, jward@uwf.edu, or phone 2431. See Advertising for more information.

9. Professional Services
   - a. Requires a completed Consulting & Professional Services Form

**Instructions**

Direct Pay Procedures -- Each department within UWF shall review the services that the vendor is providing to determine whether the expenditure type is on the approved direct pay listing prior
to placing an order and requesting payment by Accounts Payable. If the expenditure is eligible for direct pay, the department may order the service and request payment.

The department will:
   a. access the Direct Pay Request; go to MyUWF → Direct Pay Request for a form.
   b. attach original receipts and supporting documentation to the Direct Pay Request;
   c. obtain authorized signature; and
   d. forward to Accounts Payable for processing.

Accounts Payable will:
   a. verify that the request meets the direct pay eligibility requirements;
      1. Yes – proceed to next step.
      2. No – return the request to the appropriate department denying the payment.
   b. verify that vendor is in Banner; and
      1. Yes – proceed to next step.
      2. No – notify the department that vendor must complete online Vendor Registration process (department will have to notify vendor and instruct them to go to Procurement and Contract's external website and complete the Vendor Registration);
   c. process the request for payment.

A screenshot of a Direct Pay Request Form is on the following page.
UNIVERSITY OF WEST FLORIDA
DIRECT PAY REQUEST (DFR)
SEND COMPLETED FORM TO FINANCIAL SERVICES, BLDG 20E

___ Contact the UWF requestor below when the check is ready for pickup, otherwise check will be mailed to the remit to address

VENDOR/PAYEE INFORMATION:
___ UWF Student   ___ Student Employee   ___ UWF Employee   ___ Individual/Vendor

Banner/UWF ID# ____________________________

Name (as appears on income tax return) ____________________________

Business Name (if different from above) ____________________________

Remit Address ________________________________________________________________________

City __________________ State ______ ZIP Code, ___________ Phone ________________

UWF REQUESTOR:

Name __________________________________________ Department Name & Bldg #

Phone ___________________ Email ____________________________

<table>
<thead>
<tr>
<th>BANNER INDEX NO.</th>
<th>COMMODITY CODE</th>
<th>ACCOUNT CODE</th>
<th>ACTIVITY CODE</th>
<th>DESCRIPTION OF COMMODITY/SERVICE</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ADDITIONAL ATTACHMENTS (check when applicable):

___ Membership Open Record Certification is attached when not currently on file with Financial Services.

___ For Sponsored Research accounts, proof is attached that Catering, Food or other exceptional purchase is specifically authorized in the grant.

___ An original approved contract is attached for entertainment contracts.

HELPFUL REMINDERS:
All Direct Pay Requests must be accompanied by a vendor’s original invoice or receipt.
PLEASE DO NOT: Use any highlighters on receipts or invoices as information underneath is not readable OR viewable when scanned.
PLEASE DO NOT: Place any scotch tape over any printed information on receipts or invoices or when attaching small receipts to larger pieces of paper as this makes information underneath not readable OR viewable when scanned.
PLEASE DO NOT: Use any staples to attach smaller receipts/invoices to larger pieces of paper as staples jam the scanner.

REQUIRED FOR PAYMENT. This purchase serves the interests of higher education as follows:

Authorized Signature ____________________ Date ________________

Printed Name __________________________________________

AP Date Stamp

__________________________________________

87

Academic Affairs OA Handbook-05/01/2015
EMPLOYMENT POSITION MANAGEMENT
Superseded By People Admin 7 (PA7)

Description and purpose: The University of West Florida is committed to employee development through the utilization of the University Work Force (Staff) employee evaluation programs to acknowledge performance, to communicate performance effectiveness, to aid in improving performance in assigned duties, and to promote career enhancement. Workforce Employees shall be provided with a current position description and a list of goals, objectives, and/or standards at the time of appointment to their position.

Performance Evaluations: All access to performance evaluations will continue through PPEMS 5.8 until further notice.

Review Annual Performance Evaluation Changes

UWF has three types of evaluations:

Position Orientation
All University Work Force employees shall be evaluated at the end of the position orientation year.

Annual
Employees shall be evaluated annually in July by their immediate supervisor.

Special
May be initiated whenever the immediate supervisor determines the employee’s performance has changed from the rating level reflected on the most recent evaluation.
The review period for Annual Performance Evaluations is July through June. Objectives for the next year are outlined during the performance appraisal process.

Access:

As of January 15, 2015, the Employments Position Management app in MyUWF has been superseded by the People Admin 7 (PA7) app in MyUWF. Take the link to PPEMS 5.8 on the sign in page marked as follows:

Employees: To access the PPEMS 5.8 System, please click this link:
https://pa135.peopleadmin.com/hr

Log in – If you have multiple user types, make sure your user type is set at Employee User Type. To change user type, go to Admin, select Change user type at the bottom of your menu bar. This will open a screen that shows you all the various user types you have been assigned. Please select employee, then select change group. The screen will automatically refresh.
You are ready to begin:

- Go to Evaluations, select Begin New Evaluation, click on Start Action
- Type in your last and first names, ID number, position number or title, and click on Search. Under the appropriate title, click on Start Action

Your evaluation appears, click on Start Action

- Verify the employee’s information on the Employee Detail tab and click on Continue to Next Page
- Review the Current Years Objective tab and click on Continue to Next Page
- Complete the Employee’s Self Evaluation and click on Continue to Next Page
- Complete the Employee Supervisory Communication form (optional) and click on Continue to Next Page
- Click on Send Evaluation to Supervisor for Review and click on Continue
- Click on Confirm

If you choose to Save and not submit your self-evaluation, please remember when you go back to resume work on your evaluation, you will go to Evaluations–Pending evaluations.

Note: Once your evaluation is completed by your supervisor you will be notified by email.

To Certify Your Evaluation

You may access the Position, Performance and Employment Systems (PPEMS) by logging into MyUWF and clicking on the Employment/Position Management tab. You will then be prompted to log in again with your ArgoNet UserName and password.

- Go to Evaluation, click on Pending Evaluations
- Click on View
- Click on Edit to review all portions of your evaluation
- Add comments on the Employee Detail page (optional) and click on Continue to Next Page
- Review the Objectives for the Next Review Period
- Click on Continue to Next Page until you reach the Supplemental Documents tab (optional)
- Click on Continue to Next Page
- Select Certify and Send to Supervisor or Refuse to Sign and Send to Supervisor
- Click on Confirm

Contacts: Human Resources, LaBratta Epting at 850-474-2292 or Sharon Jones at 850-474-2611
EVENT PLANNING

Description and purpose: Events can range from a small meeting in a classroom to a large event with guest speaker and catering. UWF offers a wide variety of rooms and supplies, free of charge. There is a charge for catering. The key components of event planning are:

A. Venue selection
B. Guest Speaker
C. Catering (if needed)
D. Necessary equipment
E. Advertising

Venue Selection

First and foremost, as soon as you have a date and time for your event, secure a place for the event because large rooms suitable for events can book up quickly. There are two sources of free rooms: classrooms or meeting rooms in the University Commons, Building 22.

A. Classroom reservations
   1. To check classroom availability - go to MyUWF  Classroom List  pick a classroom, and click the details link for information about the classroom.
   2. To reserve classrooms - email Kendra Loucks, at kloucks@uwf.edu, in the Registrar’s office, to request a room. Kendra can also check for availability of a room.

B. University Commons reservations
   1. The University Commons building contains the following rooms:
      i. The conference center that accommodates up to 600 people and can be subdivided into three smaller rooms.
      ii. The conference center lounge nearby the conference center accommodates up to 80 people, and has a sink and counter for serving food.
      iii. There are several smaller meeting rooms that will accommodate from 12 to 56 people. For a complete list of rooms, go to http://uwf.edu/ucommons/confServices/index.cfm.
   2. Email the office of University Commons and Student Activities at saov@uwf.edu to check on availability of rooms or call x2095.

C. Special Event Parking
   1. If you are expecting guests from outside of UWF, you should arrange parking. Please refer to the following link: http://uwf.edu/parking/busparking.cfm
Guest Speaker

If you will have a guest speaker or visitor that is traveling to UWF, you will have to prepare a TAR/TER and arrange an honorarium payment, if needed.

A. TAR/TER
   1. First, your guest will have to register as a vendor in order to receive a Banner ID number to be used on all paperwork. Send instructions to your guest for registering as a vendor, along with the link to the vendor registration page: http://uwf.edu/procurement/pages/VendorReg.cfm
   2. After your guest has registered, check the Banner Vendor Search List to see if your guest name and Banner ID number appears. Access this list by going to MyUWF → Go Shopping → Banner Vendor Search List.
   3. Once you have the Banner ID number, create a TAR with any agreed upon possible reimbursements. If the funds are coming from additional sources than your department, you will need authorized signatures from the sources, in addition to your chair’s signature.

B. Transportation
   1. You can arrange your guest’s flight and pay by PCard or your guest can arrange his/her flight and get reimbursed. If the guest is driving, add the mileage to the TAR.

C. Hotel Reservation
   1. UWF has an agreement with several hotel/motels for a reduced price. You can secure the reservation with your PCard. If you plan on paying for the reservation with your PCard, most hotels have an authorization sheet that you can fax to the hotel giving them permission to charge the hotel charges to your card.
   2. If you do not see the guest after he/she has checked out of the hotel and fail to get the receipt, you can call the hotel, and they will email you the receipt.

D. Honorarium
   1. Honorarium checks can be paid from the following sources:
      a. Foundation - If the source of funds is only Foundation accounts, then go to Foundation Funds Request in MyUWF to request a check. The recipient of the check will have to fill out a W9 form for the Foundation.
      b. All other UWF fund sources and honorarium is $1,000 or less - A Direct Pay Request along with a Consulting and Professional Services form can be used.
      c. If all other UWF fund sources or a combination of UWF fund sources and Foundation accounts and honorarium is over $1,000, then a Purchase Requisition is required, along with a Consulting and Professional Services form.
   2. In order to enter Purchase Requisitions in Banner, you must satisfactorily complete online training and then gain access to the applicable Banner Fund and Orgn (Organization) Codes. For information on training and how to do a purchase requisition, go to the following link: http://uwf.edu/offices/procurement/banner-requisition/introduction-to-requisitions/
   3. If Foundation funds will be used, please refer to the following link for instructions: http://uwf.edu/procurement/SOP_200.01_FoundationReqs.pdf
4. After you have completed the purchase requisition, then complete a Consulting & Professional Services form. Go to MyUWF → Consulting & Professional Services form. Refer to the following SOP for this form:
      If you will be using more than two indexes, then write in the extra indexes. Write the purchase requisition number at the top of the form. Put in the Payment Terms box the day that you will need the check printed. Remember: Checks are printed on Tuesday and Thursdays only, so allow time for printing. Have your Chair sign this form, then email a copy of this form to procurement@uwf.edu. Always put the purchase requisition number in the subject field of all emails.

5. Procurement will email you a purchase order when your purchase requisition is approved. Email the purchase order and the signed Consulting & Professional Services form to accountspayable@uwf.edu.

6. Tips to creating a purchase requisition:
   a. Use commodity level for an honorarium check.
   b. If there is more than one fund source, charge the total check to your E&G index, then make a note in the Item Text that the check is to be charged to the following indexes. (List the indexes).
   c. If you have questions about the purchase requisition, either contact Candace Perez at cperez@uwf.edu or at x2630 or Judy Jasmyn at jjasmyn@uwf.edu or at x2633.
   d. If you have questions about the Consulting & Professional Services form, contact Paula Harding at pharding@uwf.edu or at x3046.

Catering

Food may be served at campus events in any of three ways (with certain special restrictions in the University Commons): catered by University Dining Services; prepared by the sponsor; or purchased from an approved off-campus source and either picked up or delivered but not catered (i.e. set-up, served, and removed).

   A. Departments and student organizations sponsoring events are not allowed to sell food or drinks except for approved fundraising activities meeting specific guidelines.
   B. Departments and student organizations providing their own food or purchasing from off-campus must promptly remove all leftover items at the end of the event or activity and ensure tables are wiped clean.
   C. Departments and student organizations providing their own food or purchasing from off-campus must comply with all appropriate food service handling and sanitation requirements.
   D. To cater an event with University Dining Services, contact Chartwells by going to MyUWF → Catering Menus and Ordering. You will submit your order electronically.
Necessary Equipment

If the event is held in the University Commons, then you can make your request for equipment at the same time as you reserve the room. If the event is held in a classroom, then you will have to obtain supplies by a facilities work order, and the library (if IT equipment is needed).

A. University Commons will supply:
   1. Tables and chairs
   2. Garbage cans
   3. An audio/visual cart and screen. The conference center is already set up for audio/visual needs. **Note:** The Commons does not supply laptops. If you require a laptop, and do not have one, you can check out a laptop in the library.

B. Classroom
   1. Is already set up with audio/visual equipment, including computer.
   2. Submit a work order for tables, chairs, and garbage cans stating delivery and pick up dates and times. Go to MyUWF, then, Facilities Work Order.

Advertising

A. Flyers - post flyers in the following suggested places:
   1. Side panels of doors in buildings where your audience frequents
   2. Put one flyer in each department mailbox in your college
   3. Message Composer to students (Best method to advertise to students)
   4. Ask the Office Administrator of your college to send an email to each department
   5.

B. @UWF - the submission instructions are on the @UWF webpage on the left side.

C. UWF Event Calendar - submission instructions are on the following link:
   http://uwf.edu/offices/marketing/communications/uwf-event-calendar/

D. WUWF Radio at UWF - email your request to news@uwf.org. You can also arrange for your guest to be interviewed on the radio on the day of the event by contacting Sandra Averhart at saverhar@uwf.edu several weeks ahead of time.

E. PNJ.com - to post an event in the online Pensacola News Journal go to the following link:
   http://pensacola.planetdiscover.com/sp?aff=1003&skin=

F. WEARTV.com - to post an event in the online WEAR-TV page go, to the following link, then to Add a Link: http://www.weartv.com/community/

G. WCOA Radio - email your request to wcoanews@hotmail.com
FACILITIES MAINTENANCE WORK ORDERS

Description and purpose: The Facilities Work Order site on MyUWF is used whenever the Department needs a particular job done involving the Facilities Maintenance office.

Note that requests for any quick service needs (i.e.; A/C requests, lighting needs, general classroom needs) can be handled with a call to 857-6000.

Examples of needs requiring work orders are: moving furniture, providing table and chairs for special events, office painting requests, installation of wall-hangings, and so on. Most requests are completed without charge; however, those requiring specialist work, such as painters or electricians, may involve a cost to the Department.

Instructions

A. Use the TMA Systems site to initiate the Work Request by selecting “Submit a Request.”

B. Specify the campus, then the building in which the work will take place.
C. Choose the building.

D. Complete request form by entering your name, phone number, and email address. Use the Area drop down box to indicate the specific room in the building.

E. Provide a brief explanation of the work requested. If you are requesting supplies for a specific event, be sure to include the time and date you need the materials and a time and date they can be returned.

F. Submit the request, at which point your request will be numbered and an acknowledgement email sent.
G. Once the request is accepted by the Facilities Maintenance office, they will issue a numbered Work Order and an email will be sent notifying you of the order. Status emails will follow.

H. Use this same site to check on the request or work order and notations about possible charges.

If the work requires charges to the Department, you should receive notice of estimated amount to approve before work ensues.
FACULTY ACADEMIC CREDENTIAL SYSTEM (FACS) DATABASE

Description and purpose: The Faculty Academics Credential System (FACS) is the University website housing the credential qualification information on all instructional staff for use in accreditation reporting. It contains the SACS form (Faculty Qualification Worksheet) and curriculum vitae (CV) for each faculty member with syllabi for courses taught each semester. It is also the site though which the Annual Evaluations for regular faculty take place each Summer and the review forms for Adjunct Faculty and GTAs are generated each semester. NOTE: It is recommended that Google Chrome is utilized for accessing this system.

The site is available through MyUWF. The login with UWF UserName and password assures that only faculty and administrative staff have access. The FACS home page provides a link to an online tutorial with instructions on uploading procedures.

Faculty members upload their CV updates, syllabi (due by the end of drop/add, the first week of classes each semester), and Annual Evaluation self-evaluation through this site and have access to their personal data only.

Department Chairs and Office Administrators have access to records on all instructional staff within the Department to allow monitoring of Annual Evaluation processes and the uploading of syllabi.

Office Administrators are responsible for completing the SACS form and uploading a CV for each teaching staff at their initial hire. As part of the hiring process, all regular, visiting, and adjunct faculty, and graduate teaching assistants must have the online version of the SACS form in the FACS database and a printed version signed by the Department Chair submitted to the appropriate Dean’s office.

On the Departmental Management tab read the instructions for adding new hires to the listing of teaching staff in the Department. Scroll down to the search box and enter the name or ID number, then click the add button. If the faculty has been processed in Human Resources, you will get a message saying the addition has been made.

SACS Management

To select the appropriate record, click on the View SACS Record for the drop-down menu on the Departmental Management tab or use the Select the Faculty menu on the SACS Management tab.

A. The General Information tab will appear on the screen (see below).
B. Input the appropriate information from data provided on the faculty member’s CV.
   1. **Status**
   2. **Funding Source** is generally E&G, unless the position is grant funded.
   3. **Teaching level** should be appropriate to the highest degree completed.
   4. **Rank** for an adjunct faculty is Instructor, unless they have taught for the University a number of years and the Dean’s office has given them the designation of Faculty Associate.
5. **Teaching Fields**

6. **Meets faculty requirements based upon advanced academic work**
   a. Indicate Yes, if the new faculty has at least a Master’s level degree in their teaching field, then indicate the
   b. **Number of Graduate hours in the field** as 30+, then skip to the bottom.
   c. If No, then also indicate the number of **Number of graduate hours** as either 0–17, or 18–29, then indicate Yes on **Meets qualifications based upon demonstrated competencies**, and in the text box, provided give an extended explanation of the specific personal experience that indicates the needed competency in their teaching field. Attach support documentation to the hardcopy of the FACS form for their credentials file in the Dean’s office. For Graduate Teaching Assistants the **Number of graduate hours** must be **18-30** and the justification should include a listing of the specific courses taken by the student.

7. Click the **Save General Information** button.

C. The **Degree Information** tab and enter degrees noted on the C

D. The **Documentation Information** tab is completed by personnel in the Dean’s office confirming the hardcopy submissions of FACS form, CV, transcripts, and letters of recommendation.

E. Click on the **View Printable SACS Form** button on the right-hand portion of the screen (see below), print the form, obtain the Department Chair signature, and submit to the Dean’s office.

F. Click on the **Upload Vita** button, choose the CV file from your hard drive, and click **Okay**.

G. Click **View Vita** to confirm the document uploaded properly.

**Departmental Management**

Also on the Departmental Management tab is a button for **Adjunct Faculty & GA Reviews**. After processing each semester’s Student Evaluations (SAI), generate the review forms by clicking on this button and selecting the appropriate semester. Print the forms for Department Chair’s signature, then submit to the Dean’s office.

Use the **Course Syllabi Report** to generate a listing of all courses for a particular semester with notations on whether or not a syllabus has been uploaded in FACS.

**Syllabi**

Faculty members upload their syllabi each semester using this tab. It includes a listing of all courses taught for a particular semester with an **Upload** or **View** button for each.

Office Administrators and Department Chair are provided with a listing for all classes offered in the Department for a particular semester. This provides access to all syllabi and allows you to upload for faculty if they are experiencing difficulty with the submission process. It is recommended to upload in PDF format.
Annual Evaluations

Faculty members upload their annual self-evaluations and updated vita on this tab.

Department Chairs add their evaluation to the faculty evaluation and use the **Department Option** button to upload the Department’s standards document any time these have been revised.

Department Chairs and Office Administrators have access to the **Review Evaluations** listing to monitor the progress of the evaluation process. Once evaluations have been completed through the Provost level, use the **View Evaluation** button, then **View Printable PDF** to obtain copies for Department files.

See the “Faculty Qualifications Worksheet” on the following page:
ATTACHMENT FF
THE UNIVERSITY OF WEST FLORIDA
FACULTY QUALIFICATIONS WORKSHEET
COMPLIANCE WITH SACS CRITERIA
(REvised 07/24/96)

Directions:

This worksheet is to be completed by the hiring department upon hiring of a faculty pay plan employee (regular, visiting, or Adjunct; E&G, grant, or auxiliary) or graduate teaching assistant. The completed worksheet is to accompany the initial action sheet or contract which places the individual in a given position (See also Notes Below.)

The criteria for faculty qualifications are specified in section 4.4.2 Professional and Scholarly Preparation of the SACS Criteria.

1. a. NAME
b. UWF ID Number

2. TITLE (RANK)

3. COLLEGE: College of Arts and Sciences

4. DEPARTMENT: ENGLISH/FOREIGN LANG

5. STATUS: Adjunct

6. FUND SOURCE: E&G

7. TEACHING RESPONSIBILITIES (for instructional personnel only):
   a. Level: Lower Division, Upper Division
   b. Teaching Fields: psychology

8. Meets faculty qualifications based upon advanced academic work? Yes

9. Holds Terminal Degree(s)? No

10. Holds Master’s Degree(s)? Yes
    Doctoral Degree(s):
        a. Institution: University of West Florida
        b. Year: 1998
        c. Name of Degree: M.A.
        d. Specialization: Psychology
        e. Official copy of transcript is in personnel file?

11. Holds Bachelor’s Degree(s)? Yes
    Doctoral Degree(s):
        a. Institution: University of Houston
        b. Year: 1978
        c. Name of Degree: B.A.
        d. Specialization: Anthropology
        e. Official copy of transcript is in personnel file?

12. Graduate Hours in Teaching Field:
    a. Number of graduate semester hours in teaching field (for instructional personnel only): 30+
b. Official copy of transcript verifying number of semester hours in personnel file?....... No

13. MUST BE COMPLETED IF ANSWER TO NUMBER 8 IS NO.
Meets qualification based upon “unique experiences and demonstrated competence” in lieu of advanced academic preparation........ No
If “No,” describe the circumstances justifying the hiring of this individual.

_________________________
Department Chairperson

_________________________
Date

NOTES
This worksheet is to be completed and filed upon the initial hiring in a given department. In the case of adjuncts and graduate teaching assistants for whom action sheets are submitted each semester, the worksheet does not have to be refiled unless the person is being hired by a different department (i.e., hired for teaching in a different field).

Transcript Documentation of Academic Work for regular and visiting faculty must be on file at the time of submission of the initial action sheet. Transcript documentation for adjuncts and graduate teaching assistants must be on file prior to the end of the semester in which the individual has the first teaching assignment.

https://secure.uwf.edu/sacs/sacs_form.cfm?id=900000480&department=EF
Contact Don Thompson, hdthomps@uwf.edu or Judy Jones, jjones@uwf.edu for access to FACS.
FACULTY SEARCHES

Go to Human Resources, Faculty Search/Hiring.
FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT (FERPA)

Description and purpose: FERPA stands for "Family Educational Rights and Privacy Act of 1974" also known as "The Buckley Amendment." FERPA is the United States federal law that protects student records privacy review and disclosure rights. FERPA places certain restrictions on the kinds of information about students that can be shared without explicit permission from the student.

Directory Information

Under the provisions of the Family Educational Rights Privacy Act (FERPA), students have the right to withhold disclosure of the information listed below. The following items are designated as "Directory Information" and may be released by this University to non-institutional persons or organizations:

- name, address, telephone number, dates of attendance, email address;
- most recent previous institution attended, major field of study, awards, honors (including Deans' list), degrees conferred (including dates);
- past and present participation in officially recognized sports and activities, physical factors (height, weight of athletes), date and place of birth;
- Commencement Program (name and degree at time of graduation);
- news releases (at time of graduation).

In order to prevent disclosure in this publication, students' requests for non-disclosure must be received in the Office of the Registrar prior to the end of the Fall semester’s Drop/Add period.

The request to withhold directory information will be honored and must be directed to the Office of the Registrar. The University will not assume responsibility to contact the student for subsequent permission for release of these items. The University assumes no liability for honoring the request that such information be withheld.

For more detailed information on FERPA regulations at UWF contact:

**Dean of Students Office**

Building 21 Room 130
(850) 474-2384
deanofstudents@uwf.edu

**Student Records**

FERPA regulations also restricts access to student’s records. Using Contact and Privacy Information App in MyUWF, students may update their address, phone number, emergency information and restrict the release of information.
Students wishing to release information (academic, financial, etc.) to third parties (including parents) should complete the Release of Information Form (FERPA), which is also available in the FERPA app on MyUWF and is attached below.

Department Administrators can access the Authorization to Release information submitted by students in Banner Production (see the Banner System section of this handbook) with the SPACMNT form. You can also access the release information via the Student Directory Information app in MyUWF.

The link below from the Registrar’s webpage provides more complete information on student records privacy.

http://uwf.edu/offices/Registrar/resources/student-records-and-privacy/

### Authorization for Release of Student Information

in accordance with Family Educational Rights and Privacy Act (FERPA)

The purpose of this release is to facilitate the communication of student information to authorized individuals identified by the student. Generally, this information will be released without student notification; however, the University reserves the right to notify students prior to the release of information.

The Family Educational Rights and Privacy Act of 1974, as amended, protects the privacy of education records, establishes the rights of students to inspect and review their education records, and provides guidelines for the correction of inaccurate or misleading data through informal and formal hearings.

I. Student Information:

<table>
<thead>
<tr>
<th>UWF ID</th>
<th>Name of Student</th>
<th>Address</th>
<th>Phone #</th>
</tr>
</thead>
<tbody>
<tr>
<td>970</td>
<td>(please print)</td>
<td>Box # or Street</td>
<td>City</td>
</tr>
</tbody>
</table>

II. Recipient Information:

I authorize the University of West Florida to release my educational records to the person(s) specified below.

<table>
<thead>
<tr>
<th>Name(s)</th>
<th>Address</th>
<th>Phone #</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(please print)</td>
<td>Box # or Street</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name(s)</th>
<th>Address</th>
<th>Phone #</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(please print)</td>
<td>Box # or Street</td>
</tr>
</tbody>
</table>

My educational records may be released upon written request by the listed person(s) bearing a signature, via mail or fax, to the Office of the Registrar. Information will be released on an individual basis when contacted by the authorized person(s). Records which may be released include, but are not limited to, Financial Aid, Disciplinary, Grades, and Student Account.

III. Consent:

The above information may be released with my full consent. I understand that this authorization remains in effect until my written revocation is received by the Office of the Registrar.

(Student Signature) (Date)
FINANCIAL SERVICES

Description and purpose: The UWF Department of Financial Services is committed to providing timely and helpful accounting services to the university community and external users of financial information. Creating a positive customer experience for you, our customer, is our top priority. The following departments make up Financial Services:

A. **Payroll** - The Payroll department is responsible for all payroll processing including action sheets. Payroll Information Forms include:
   - Payroll Stop Payment Request Form (pdf)
   - W-4 Form 2015 (pdf)
   - W-2 Information for Employees 2015 (doc)
   - FAQs About Electronic W-2 (pdf)
   - Payroll Processing Procedures (doc)
   For questions or problems regarding payroll, please contact Nancy Wilson, (850) 474-3051.

B. **Property** - Also go to Property in this manual.

C. **Accounts Payable**

D. **Vendor Information**

E. **PCI Compliance**

F. **Travel** - Also go to Travel in this manual.

G. **Cash Collection**

Related Links
1. UWF Nautilus Card Office
2. UWF Higher One Card
3. Florida Auditor General
4. Florida Dept. of Revenue
5. Florida Dept. of Financial Services
6. Florida State Division of Treasury
7. ICOFA (Inter-institutional Committee on Finance and Accounting)
9. State of Florida Colleges and Universities
10. Year-end Deadlines
11. Expenditure Guidelines

Other Department Links
1. Procurement and Contracts
2. Internal Auditing and Management Consulting
3. Budget Financial Planning
4. Business Finance and Facilities
Financial Services Forms
1. General
2. Accounts Payable
3. Memberships
4. Cashiering
5. Payroll
6. Property
7. Travel
FOUNDATION

Description and purpose: The University of West Florida Foundation, Inc. was chartered in 1965 as a direct-support organization of the University of West Florida. Its Articles of Incorporation provide that it will accept and administer gifts on behalf of the University and administer those gifts in accordance with the wishes of the donor. It is a qualified charitable organization under Section 501(c)(3) of the Internal Revenue Code of 1954 and 1986, which exempts its revenues from federal income taxation.

Gifts, matching funds, and the earnings thereon will be used to further the interests of the University by supplementing appropriated resources in support of the teaching, research, and service components of the University. It is both prudent and appropriate to remember at all times that these resources represent gifts and therefore should be expended in ways such that the benefactor would be pleased with how their gifts are used and with our stewardship. Through the generous support from alumni, friends, corporations, foundations, and others, UWF continues to grow and enhance its academic and research programs and student support.

Office Responsible

Although the University President is fully accountable to the Florida Board of Education for the proper budgeting and expenditure of all Foundation funds, it is the responsibility of the appropriate Vice President, Dean, Director, and Account Manager to be accountable for their accounts. The Foundation business office is responsible for document review and the implementation of this policy. Each department has a Foundation account or accounts that hold funds donated to the department. The following is a list of permitted and not permitted expenditures:

Permitted Expenditures

Timeframe for submission of reimbursement requests will be limited to 90 days from the date on the receipt being submitted for reimbursement.

A. Professional development costs may include national and international travel to conferences, symposia, and training programs. These activities will help ensure that faculty and staff remain current in their fields; contribute expertise to colleagues; and, bring recognition to the University. Note: Travel arrangements should be arranged through the University by TAR whenever possible.

B. Student recruiting, support services, student program support, and financial aid represent important objectives for which State funds are seldom sufficient. In addition, such student activities as orientations, picnics, banquets, and student organization support are an integral part of the student experience and may be supported financially through the use of local funds.

C. Facility construction or improvement is often the focus of private fund raising. In other cases, discretionary local funds may be used to construct or improve critical facilities. Note: If the University has the capability to perform a function (shelving, painting, cleaning, etc.), an outside vendor should not be contracted.
D. Organizational and management planning and development activities must be undertaken periodically to assure that effective strategies and plans are developed and evaluated. This may include the use of consultants, retreats, and rented facilities away from the distractions of the normal workplace.

E. Community/professional relations, public relations, donor relations, expressions of institutional gratitude, and government relations activities are essential to a publicly assisted institution if it is to properly communicate its mission and needs to individuals who are in decision-making positions affecting the University. Because of the political sensitivity of these types of expenditures, great care and judgment must be exercised in their use.

F. Acquisition of professional recommendations sometimes requires the engagement of specialized consultants for a range of financial, legal, medical, environmental, architectural, and organizational issues. When internal staff expertise is not available, or requires corroboration, obtaining external advice may be appropriate.

G. Recruiting and retaining outstanding faculty and staff may require the use of local funds for candidate interviews, spouse travel, relocation expenses, search consultant fees, program initiation and support, facility renovation, and/or equipment, etc. In certain instances when State funds are insufficient to attract and retain outstanding talent to the University, it may be appropriate to use local funds for salary supplements or other forms of personal compensation in order to be competitive in the academic or administrative marketplace. However, all salary supplements and other forms of personal compensation require written approval by the President of the University or designee.

H. Improved faculty and staff morale activities require the expenditure of funds for special recognition awards, observances of major holidays, expressions of institutional gratitude, and events marking the successful completion of major projects of significant benefit to the University.

Prohibited Expenditures

A. Foundation funds may not be used to further the political or religious aspirations of an individual or group.

B. Due to the complexity and wide variety of rules pertaining to visa holders, payments to non-U.S. citizens for services or other obligations will not be paid directly by the Foundation. However, upon review and approval by the Controller’s Office, such payments may be paid by the University and funded using Foundation funds.

C. Foundation funds may not be used to pay late fees/charges, penalties, fines, or citations/tickets. This includes “fines” assessed by a civic organization for a no-show on a previously confirmed attendance.

D. Expenditures for personal clothing will not be paid with Foundation funds. This does not include items purchased to commemorate special events of the University of West Florida or gifts to donors or special guests of the University.

E. Cellular telephones and service fees can be paid using University resources. Therefore, Foundation resources should not be used for cellular telephone expenses.

F. Expenditures for bottled water will be permitted only in circumstances in which potable water is not available within a reasonable proximity to the working environment. An exception to this policy will be allowed only when the bottled water is designated for
University guests and their hosts. Typically, these purchases are only permissible for offices with major external roles (e.g., President’s office).

G. Kitchen supplies such as cups, plates, napkins, sugar, coffee, soft drinks, etc. should be acquired through means other than Foundation funds. An exception to this policy will be allowed only when the items are designated for University guests and their hosts for the particular visit. Typically, these purchases are only permissible for offices with major external roles (e.g., President’s office.)

H. Payment for routine off-campus meals that do not have business as their primary purpose is prohibited. Receipts for business meals must state the names of all attendees and include a written statement of the business purpose of the meeting. Additionally, gratuities are limited to 20% of the cost of the meal. Reimbursement for modest refreshments during Department meetings, Board meetings, and the like is allowed and will be made to the individual or caterer who provided the items/services.

I. Payment for items associated with recognition of individual employee’s birthdays (e.g. cake, drinks, balloons, and paper goods) is not an appropriate use of Foundation funds. A modest group celebration of birthdays is permissible (e.g., the President hosting an event for all of that month’s birthdays.)

J. Generally, Foundation funds should not be used for service club or social club memberships (e.g., Rotary, etc.). The exception to this is for individuals who play significant roles in furthering community relations (including the President, VPs, and Deans). Memberships for individuals beyond the President, VPs and Deans are limited to persons with major external roles and require approval by the appropriate VP. Only basic membership dues (i.e., not voluntary donations, fines, etc.) will be reimbursed. In all cases, the primary purpose of the membership and the expenditure should be for promotion of the University.

K. Office maintenance functions (carpet cleaning, plant maintenance, etc.) may not be paid for with Foundation funds.

L. UWF parking decals for faculty and staff, including adjunct instructors, may not be reimbursed by or purchased through the Foundation.

M. In instances where a mandatory facility fee is not imposed by a hotel/motel, payments made for in-room movies, laundry, mini-bar, and other hotel amenities may not be reimbursed by the Foundation.

N. Payments for office supplies or furniture and equipment that are not business-related, customary, or reasonable may not be paid for with Foundation funds.

O. Need for Prior Approval

It is recognized that the appropriateness of some expenditures will be unclear even in light of this policy. In these cases, it is the responsibility of the unit, account administrator, or individual to obtain prior approval from the Foundation Business Office.

Foundation Refund Requests

Foundation refund request has changed from RouteIt to Web-Invoicing. Web-Invoicing is available via MyUWF by searching for “Web-Invoicing.” You can save Web-Invoicing as one of your bookmarks/favorites.
Web-Invoicing is a BlackBaud product that works best in a Microsoft web environment. Please use Internet Explorer only when processing a Web-Invoice. Other browsers will limit printing and field options.

How do I log in?

After selecting the “Web Invoicing” link, the following log in box appears. Enter your UWF email address and password in the above fields.
What the Home screen looks like:

Step 1: Initiate a Request

New Invoice Request-Box 1
Requestor: Who the request is payable to (vendor)
Approval Rule: What Foundation Account/Project
Document Date: Today’s Date
Description: Brief transaction description that will appear on account ledger (limited to print 20 characters)
Add Attachments: Used to upload support to the request

Requestor/Vendor Search

- Requestor/Vendor field allows user to search for the payee. Use the “Vendor Name” field to search. In the example below, “char” was entered to find “Chartwells.” Search for people by last name.
- **NOTE:** Vendors must be in the system before a request can be submitted. If your vendor does not appear, contact Lisa Bethune in the Foundation (lbethune@uwf.edu).
Approval Rule

- Options in the drop down will be unique to each user’s access. Select the Foundation Account/Projects to charge the expense to. This example is selecting 04240, which is the College of Business.
- NOTE: All Foundation accounts now lead with a preceding “0”.

Document Date & Description

- Enter today’s date in the Document Date Field.
- Enter a brief description (up to 20 character spaces) of the expense in the Description Field. This description will appear on the ledger account.
Attaching Documents

- Use the “Add Attachments” link to add and remove documents to the request.

- The following pop-up screen appears. Use the “Choose File” option to select the document, then select “Upload” to attach.
- Supporting documents must be attached for approval and reimbursement.

Attaching Documents cont.

- In the “Attachments” screen, you can upload several files, view the files uploaded, and delete files uploaded in error.
- Once you have finished uploading attachments, select “Close” to complete.
Request Information area-Box 2
Expense Category: Used for each receipt or invoice (default)
Rate: Amount of each receipt or invoice
Date: Receipt, invoice, or expense item’s date
Distributed: Select the Foundation Account/Project to charge to (must be same as “Approval Rule” in Box 1)
Expense Detail/Purpose: Detailed explanation is required here
Expense Category

- Use the “Add Line Item” to list multiple invoices or receipts separately.
- Use the “Trash Can Icon” to delete a line item.

Expense Category cont.

- You must select the default Expense Category of “Invoice Exp” for each line item. Use the Search binoculars to find “Invoice Exp.”

- The screen to the left will appear after selecting the search binoculars. Select “Search” and the default category appears. Select the “Invoice Exp” option.
Rate & Date Fields
- Enter the amount of each item or invoice in the “Rate” field.
- Enter the date of the receipt or invoice document in the “Date” field under “Expense Category.”

Distributed Field
- Select the “Distributed” Link.
- The screen to the right will pop-up. You will again, select the Foundation Account/Project that the expense will be charged to. Use the search binoculars to find your Foundation Account/Project.
Distributed Field cont.
In the pop-up box, search in the “Project ID” or “Project Description” field for the Foundation Project/Account number your expense is to be charged to (all other fields are not searchable at this point).

- Select from the list the proper Foundation Project/Account.
- In the example below, a partial Foundation Project/Account number of “0424_” was searched on to find “04240.”

Distributed Field cont.
- The “Class” and “Event/Activity” are not filed out by departments.
- The “Event/Activity” field is only used by University Advancement staff.
- Below is an example of a completed “Distribution.”
- Select the “OK” option when finished.
Expense Detail/Purpose

- A detailed explanation is required. To be considered complete, the request should include: a business purpose of the purchase, the event/activity, date, location, attendees/participants, agenda, etc. (An example is shown below.)
- A request that is blank or does not have the required information will be denied and returned to the initiator for correction.

Attributes-Mail Method

- Use the “Mail Method” attribute to indicate how the check should be disbursed. **NOTE:** This is a required field.
- Option Selected: “Call for Pick-up” - In the comments section put the employee’s name and phone extension to call for check pick-up.
- Option Selected: “Campus Mail (if under $200)” - In the comments section put the employee campus bldg/room to send the disbursement.
- Option Selected: “Hand Deliver” - Only used for payments to Cashier’s Office or Chartwells, no comment required.
- Option Selected: “Mail to Payee” - The Foundation will mail the disbursement to the address we currently have on file.
- **NOTE:** The Date field is not used.

Step 2: Save and Review the Request
Save

- Saving your request will produce a request number, similar to RouteIt.
- **NOTE:** The web-based program times out after 10-15 minutes. Any unsaved work will be lost, so **SAVE OFTEN.**

![Request Number](image1)

**Review**

- Review all information to ensure data is correct and necessary documents are attached.
- To view the invoice request approval path select “**Show Details.**”

![Show Details](image2)

- The pop-up box shows the Project/Account number and Name. It also shows the order of the individual’s that will review and approve the request.
Step 3: Submit Invoice Request

Submit the Request

- Once you have reviewed your request, select “Submit Invoice Request” to move the request along the approval path.

Submit the Request

- After you click the “Submit Invoice Request” button, the following screen will appear.

  NOTE: The date the original documents are received in the Foundation office will determine when your Request will be processed for check cutting. Original documents with Web-Invoice request Number received by NOON on Wednesday will be processed on Friday. Requests received after NOON on Wednesday will be processed the following Tuesday.
Copying a Prior Request

Copy a Request

- From the Home screen, select “My Invoice Requests.” You will see all your prior requests. Selecting “Copy” will bring up an exact copy of a prior request that you can edit and re-submit for processing.
Account Managers, Deans, and V.P. Review and Approval

Review & Approval

Review links
- What the Home screen looks like
- Note: There are two methods for review and approval

All Request for Your Review
- Here you can see request details pending your review.
- Select “Review” to the left of the invoice request you want to review and approve.
Review Items

- **Show Details:**
  - Review the approval path
- **View Attachment(s):**
  - Review supporting document(s)
- **Edit Distribution:**
  - Review amount & Acct/Project #
Review

Show Details
- The pop-up box shows the Project/Account number and Name. It also shows the order of the individual’s that will review and approve the request.

View Attachments
- Select “View Attachments” to open the pop-up screen. In the pop-up screen, select “View” to see the PDF document(s).
Edit Distribution

- Review the distribution for the correct amount and Foundation Account/Project number that the invoice is coded to.

Edit Distribution cont.

- In the event, the Foundation Account/Project number is not the same as the “Approval Rule” number, you can edit the project number or reject/return to the initiator for correction.
• In the pop-up box, search in the “Project ID” or the “Project Description” field for correct number.

Approval

Action Items
• Approve: Sends to next approver
• Reject: Sends the request back to initiator
• Save: Saves the request back to your approval queue
Approve

- Select “Approve” to move the request to the next approver in the approval path. If you are the final approver for the Foundation Account/Project, the request will forward to the Foundation to review.

Reject

- Select to return the request to the initiator for editing.
- NOTE: When the request is resubmitted after being rejected and edited, it will cycle back through the entire approval path.
Save

- Select when you need more time for review

My Account User Options

Items

- Account Details: Your UWF Email address
- Notifications: When would you like to be notified
- Out of Office: Selecting a proxy
Items Worth Noting!

- Initiator- Remember to SAVE often. Website times out in 10-15 minutes
- Remember to ensure that the Approval Rule Number is the same as the Distribution Project Number.
- Documentation must be attached for review, approval, and processing.
- When the request is resubmitted after being rejected and edited, it will cycle back through the entire approval path.
- If you encounter problems or error messages not discussed here, please contact the UWF Foundation.

Lisa Bethune       Ext. 2986       lbethune@uwf.edu
Or
Jan Butts          Ext. 3284       ebutts@uwf.edu

Foundation Reports

Department heads have access to Foundation the following reports:

- Monthly Fund Activity Report – shows all donations, expenditures, and balances for the month for each account.
- Funds Access Review – shows which employees have access to reports.
- Donor List with Contact Information – This information is available for thank you cards to donors.

Each month, the Monthly Fund Activity Report will be emailed to you; however, Office Administrators can gain access to the same reports by requesting the access forms at advservices@uwf.edu. Fill out the following forms with your supervisor’s signature on the first form and your signature on the second form and deliver to Advancement Services, Building 12, or email a scanned copy to advservices@uwf.edu:

BI -Advancement’s New Reporting Tool

- The URL for the new Advancement Reporting tool is:
  http://advancementreports.argo.uwf.edu/Reports/Pages/Folder.aspx
- Be sure to save this to your “Favorites” for easy access.

Accessing Advancement Reports

- You will access Advancement Reports (Report Manager) by opening Internet Explorer.
- Report Manager will only function within Internet Explorer.
- You can name your Advancement Report shortcut anything you like.

- You can also access BI through your “MyUWF” home page.
- Click the link “Advancement Reports”.

![Image of MyUWF home page with Advancement Reports highlighted]
- Enter your ArgoNet UserName and password.

- A list of folders containing reports will appear. At present, you should see two reports in your folders: Fund Activity Report & Contributions by Fund Report.
- You will only see folders for which you have access to.


- You have the ability to change your view to “Detail View” which gives you a description of the report and what it contains.

- Click on the name of the report that you wish to run.
Enter any prompted information. Click “View Report”.
Your report will run and appear on the screen.

There are several navigation buttons available and an export option to download reports in a suitable format for printing, distribution, or emailing.

If you encounter problems or error messages not discussed here, please contact:

Jan Butts, Director of the UWF Foundation, Inc.
Phone ext.: 3284, Email: ebutts@uwf.edu
# University of West Florida Foundation

## Security Access to the Financial and Donor Data Add/Change/Termination Request

<table>
<thead>
<tr>
<th>Name: First Mi Last</th>
<th>Department:</th>
<th>Phone Number:</th>
<th>UWF Email Address:</th>
<th>Employee Type:</th>
<th>Requested Action:</th>
<th>Time Period:</th>
<th>Username:</th>
<th>Justification:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sheila W. Freeman</td>
<td>Government</td>
<td>850-474-2337</td>
<td><a href="mailto:sfreeman@uwf.edu">sfreeman@uwf.edu</a></td>
<td>Temporary</td>
<td>Add</td>
<td>3/18/14</td>
<td>argonet/sfreeman</td>
<td>To maintain Dept. of Government Foundation accounts, and send thank you notes to donors.</td>
</tr>
<tr>
<td>Jocelyn J. Evans</td>
<td>Government</td>
<td>850-474-2660</td>
<td><a href="mailto:jevans@uwf.edu">jevans@uwf.edu</a></td>
<td>Full time</td>
<td>Remove</td>
<td>9/1/18</td>
<td>argonet/jevans</td>
<td>Dept. of Government Chair</td>
</tr>
</tbody>
</table>

### Access permissions requested by:

<table>
<thead>
<tr>
<th>Name: First Mi Last</th>
<th>Department:</th>
<th>Phone Number:</th>
<th>UWF Email Address:</th>
<th>Username:</th>
<th>Department Position:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>argonet</td>
<td>Dept. of Government Chair</td>
</tr>
</tbody>
</table>

### For Foundation and Advancement Services Department use:

<table>
<thead>
<tr>
<th>Records</th>
<th>View</th>
<th>Add</th>
<th>Edit</th>
<th>Delete</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituents</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gifts</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Campaigns</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funds</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appeals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participants</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer Jobs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer Assignments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Query</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mail</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Export</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reports</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dashboard</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mapping</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Configuration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UWF Foundation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report Server</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AD Groups</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RE Groups</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Approved by (Required) Date

Approved by (Required) Date

Access granted/removed by Date

Access granted/removed by Date
University of West Florida Foundation
UWF Foundation Database Security and Confidentiality of Records and Files

The University of West Florida Foundation ("UWF Foundation"), Alumni Relations, and Development offices maintain biographic and giving information about the University’s donors, alumni, and development programs in the UWF Foundation database. All records of individuals and organizations must be kept confidential and are to be used only by staff members whose use of them furthers the mission of the University. While some of the information is public, much of it is exempt from public disclosure.

The Vice President of University Advancement and the UWF Foundation Executive Director have the sole responsibility for responding to requests which involve public records contained in confidential materials. Inquiries for contact information of an individual may be forwarded to the person whose data is being requested, allowing him/her to decide whether to contact the requester. The Vice President for University Advancement and the Foundation Executive Director must be notified of any requests for data from groups or individuals outside the University, when such requests are denied, pursuant to this policy, and the group or individual continues to make the request.

Access to the UWF Foundation database through the Raiser’s Edge Application, the UWF Foundation Report Server, or any other methods requires users to read, sign, and comply with this policy, the purpose of which is to maintain the security and confidentiality of records. Users consent to the monitoring of data and system usage by UWF Information Technology Services and the database administrator for the purposes of data verification, system planning, and maintenance.

The Employees of UWF, the Foundation, Alumni Relations, and Development agree to the following:

- The information from the UWF Foundation database cannot be released to unauthorized groups or individuals for any purpose within or outside the University of West Florida, unless specifically authorized by the UWF Foundation. It is the responsibility of the requester of the aforesaid material to ensure that the documents are secure while in their possession and properly disposed of (i.e., shredded) when they are no longer needed.
- The information from the UWF Foundation database can not knowingly be erased or modified except in the performance of assigned duties.
- The information from the UWF Foundation database should remain truthful.
- The information from the UWF Foundation database will not be maintained outside any application authorized by the UWF Foundation.
- Any information obtained from the UWF Foundation database will be disposed of after termination of employment with the University of West Florida.
- The users of the UWF Foundation database will use only their assigned user name when logging into the system.
- The users of the UWF Foundation database will create a secure access password and protect it from disclosure. The user will change the password immediately and notify the system administrator, in the event of accidental disclosure.
- The users of the UWF Foundation database will log out of the database via the "Exit and Sign Out" command or close the browser when exiting the Foundation Report Server when not actively using the database.
- The users of the UWF Foundation database will notify the system administrator in case of any security incident or system malfunctions.
- The Users of the UWF Foundation database can release information in the form of lists, labels and reports only to authorized individuals whose work has a direct bearing on alumni relations or fund-raising activities.

User’s signature below indicates understanding of and agreement to the policy outlined above. Failure to comply with said policy may lead to disciplinary measures.

Name ___________________________ Department ___________________________

Signature ___________________________ Date ___________________________
GMAIL

Description and purpose: Sending effective communication via e-mail, allows you to send time-sensitive information and materials including updates and event information within minutes. E-mail normally generates an immediate response from a call to action. E-mail allows a target audience, yet expands your reach by recipients forwarding reliable information on to other offices as necessary.

- Every UWF employee has their own email address (i.e. ggrosse@uwf.edu)
- To sign in go to MyUWF and in the search type in “Gmail for Faculty and Staff” or you can go directly to your browser and type in “gmail.uwf.edu”
- Log in by typing in your email address and password
- It is essential that you check your email on a regular basis.

For an extensive list of Gmail instructions about UWF Gmail, go to Confluence at the following link:

https://confluence.uwf.edu/dosearchsite.action?queryString=gmail&startIndex=0&where=BPL
GRADUATE ASSISTANTS

Description and purpose: Each academic year, funds are dispersed from the Graduate School and are allocated to the various graduate academic departments for graduate assistants. The academic departments are responsible for awarding these assistantships to high-performing graduate students.

What is an Assistantship?
A graduate assistantship is an award to which is tied a requirement of service to the University. This service obligation is usually instructional or research related. For these purposes, a graduate assistant is assigned to one or more faculty.

Available Assistantships
Graduate Assistantships are available to students through their respective academic departments, as well as non-academic departments. Students who are interested in learning more about available assistantships should first contact their advisor in their graduate program. Academic departments advertise their vacant graduate assistantship positions in various ways. Many academic and non-academic departments post their vacant positions on the Office of Human Resources' website at: https://jobs.uwf.edu/

Graduate Assistant Handbook
The Graduate Assistant Handbook is intended to help Graduate Assistants understand the policies and procedures that govern their appointment at UWF. The handbook answers a number of frequently asked questions about the types of assistantships available, the general requirements for assistantships, stipends and tuition waivers associated with assistantships, and the student's responsibilities as a graduate assistant.

Office Manager Handbook For Graduate Assistantship Appointments
This Office Manager Handbook identifies and clarifies the policies and procedures governing a graduate student's position as a Graduate Assistant. The goal is to answer questions for office managers about assistantships, including the types of assistantships available at UWF, the general requirements governing assistantships, the policies structuring payment and tuition waivers associated with assistantships, and the student obligations for maintaining a graduate assistantship. To further facilitate the efficient processing of graduate assistantship appointments, a list of GA FAQs addresses some recurring questions about these appointments.

Authorization Form for Graduate Assistant Assignments Exceeding 0.50 FTE
Authorization for Graduate Assistant Assignments Exceeding 0.50 FTE

Graduate Assistant Orientation Handbook (pdf)
http://uwf.edu/media/university-of-west-florida/graduate/documents/gahandbook.pdf
GRADUATION PROCESS

Description and purpose: The graduation process involves three primary steps, which begins with the student submitting a graduation application for the specific semester. These are accepted only during a specific time frame established in the Office of the Registrar. After the submission deadline, the Departmental Administrators check the student records and submit needed exceptions or notifications for special circumstances not related to ongoing courses. After the end of the semester, the Office of the Registrar makes a final check on records and authorizes graduation. All elements of the process are handled online with all forms submitted via the Banner system.

Student’s application process:

A. Select the Student Academic Records app in MyUWF.
B. Click the Apply to Graduate link.
C. Select the appropriate term. The term displayed should be the term of the student's latest registration.

NOTE: For students not registered for the current semester.

If you have not registered for courses in the semester you wish to graduate, you will not be able to apply for graduation online (there will be no term available in the drop down), please contact the Office of the Registrar or email graduation@uwf.edu with your information (be sure to include your Diploma Name if different from your name on record - be sure all spelling, punctuation, and capitalization is correct; this is how your name will appear on your diploma).

Please include the following information:
- Student ID number (970....)
- Name (as you wish it to appear on your diploma)
- Term in which you wish to graduate
- Major(s)/Minor(s) you are applying to graduate in
- Address (to mail diploma to)

D. Verify the curriculum information is correct (correct program, etc.). Click in the circle at the upper left of the information list to select the curriculum for which you wish to graduate. Then click Continue.
E. Select the Graduation Date (applications are only open for one term at a time). Click Continue.
F. Using the One of Your Names drop-down box, you may choose one of the following options:
   1. Name of record.
   2. Input new name: If you choose this option, be sure all spelling, punctuation, and capitalization is correct; this is how your name will appear on your diploma.
G. Click Continue.
H. Using the **One of Your Addresses** drop-down menu, select a mailing address for the diploma, then click **Continue**.

I. Confirm that the information displayed on the **Diploma Mailing Address Selection** screen is correct. Or, you may update the information, if it is incorrect. Click **Continue**.

J. Review information found on the **Graduation Application Summary** page prior to submission.

K. Click **Submit Request**.

You will get an Application Signature Page confirming your application has been successfully submitted. If you wish to review your graduation application, select the **View Application to Graduate** link in the **Student Academic Records Menu** app in **MyUWF**.

For further instructions: [https://confluence.uwf.edu/display/public/Applying+for+Graduation](https://confluence.uwf.edu/display/public/Applying+for+Graduation)

**Departmental check on applications:**


The Tableau report, Graduation Applications for Term _____ will provide a current listing of all applicants for the University.

In order to review those for your Department, you will need to narrow the list by selecting your Department designation from the **Dept Code** drop-down menu on the right-hand side of the screen. When you click on the arrow, all Departments are indicated with a check mark. Click on **ALL** to delete all Departments, then select the appropriate single department. The screen will repopulate with only those students who have applied from your department.

You can save this setting by clicking on the **Original View** drop-down arrow at the top left of the screen. Provide a name for the custom view, for instance “English Spring 2015,” then click **Remember**.

When you call up the report in the future, you can simply click on the appropriate custom view to access the Department list.

**Note:** This list will name all students who have applied for graduation at all levels, undergraduate and graduate, and all programs, all majors and minors. The **Graduation Status** on minors will reflect the major requirements only. You can, of course, further refine your custom view to indicated only majors, or only undergraduate students.

The **Graduation Status Code** column of the report provides the information needed to track the authorization process of the Graduation Coordinator in the Office of the Registrar. The different codes are:
NR (not reviewed) -- Initially all applicants will show this code until the Registrar has performed their initial check on the student’s record.

OT (on track to graduate) -- Indicates a student’s record has been reviewed and showed no missing requirements, taking into account current classes (but not including Exit Surveys). There is no further action needed at the Department level at this time.

MR (missing requirement) -- Indicates a requirement has not been met. Department administrator’s should then check the students Degree Works audit and input the necessary Exceptions, or contact the student about withdrawing their application.

AP (Action Plan) -- Requires that the Department submit an Action Plan to provide the Registrar with information on special circumstances that are delaying met requirements. Some examples for situations requiring an Action Plan are:

1. a student is taking a course at another university and transcripts will need to be submitted at the end of the semester,
2. a requirement appeal is in process,
3. a graduate student’s thesis submission is in still process,
4. the Thesis Grade Change form is waiting to be processed.

Students with the AP code will be sent an email explaining that they will need to meet with their advisor within three weeks to discuss the needed graduation requirements and submit the Action Plan.

CS (Cancelled) --- Indicates a student has elected to cancel their application, or the required Action Plan was not submitted within the three-week time frame required by the Registrar.

Instructions for reviewing graduation applicants and submitting Graduation Action Plan are provided in Confluence:

https://confluence.uwf.edu/pages/viewpage.action?pageId=16810421

A link to the Action Plan form is provided at the bottom of the Overview section and is also included in the email sent to students.

**Final review of applications by the Registrar:**

After grades have been submitted and the Registrar has made a preliminary check on the updated records for the students on the application list, then the Chairs will be notified to verify the Graduation List.

On the Graduation Dashboard report all students currently meeting all graduation requirements will have a WG (will graduate) status code. Chairs are asked at this time to confirm that the list of all students slated for graduation is correct. The Office of the Registrar asks that the Department notify them if there is a student slated to graduate who shouldn’t be authorized at this point and why.

Other students still showing OT, AP, or MR statuses will be verified as transcripts arrive and other paperwork noted in the Action Plan is processed.
Confirming Graduation:

Once the Registrar has confirmed all students with WG status and has awarded the degrees, Department Administrators can confirm graduation via the Student Information page in the Faculty & Advisor Services Menu app.

You must search using the student’s ID number and search in a semester following graduation. (Searching via student names provides access only to active students.)

Select View Academic Transcript, then select Unofficial Transcript from the Transcript Type dropdown box, then click Display Transcript.

The section of the transcript titled Degree Awarded or Applied For provides all the particulars of the degree awarded: type, date awarded, program, college, and major.

Contacts:

Anna Fair, Associate Registrar, Office of the Registrar, AEFair@uwf.edu , 474-2247
Alicyn Booth, Catalog and Graduation Coordinator, Office of Registrar, abooth@uwf.edu , 474-2241
HAZARDOUS MATERIAL RECYCLING

Description and purpose: The Department of Environmental Health and Safety administers recycling/disposal programs for certain types of spent batteries, printer toner cartridges, fluorescent light bulbs, fluorescent light fixture "ballasts" and non-working computer monitors.

TONER CARTRIDGES
Many types of depleted printer, copier, and fax machine toner cartridges are collected from all areas of the UWF campus and stored in the Hazmat recycling building. A company specializing in refurbishing the cartridges picks them up and takes them to the rebuild facility. Hundreds of cartridges are saved from the landfill each month and the reduced price of the recycled cartridges saves the new user the difference of the cost of new cartridges. Old cartridges should be packaged in the replacement's box and sent to building 95, ENVHS.

FLUORESCENT BULBS
Burned-out fluorescent bulbs should not be thrown in the trash. Tubes of all sizes should be disposed of properly and the materials recycled by a company that uses the proper capture technology for the gasses and Lead. The glass and metal (aluminum) is recovered when the tubes are crushed in the processing machine and the gasses are captured under negative pressure and not allowed to escape into the atmosphere. This process is expensive; however, it is the only responsible disposal method currently available. Recently at UWF, several thousand old bulbs were packaged and picked up from the storage building by the processing company. The processing company also disposes of light fixture ballasts. Some of the older ballasts contained PCBs and must be processed in a retort (burned) for proper disposal. UWF personnel responsible for these items are trained in the proper storage methods.

COMPUTER MONITORS (CRTs)
Only non-working computer monitors (CRTs) are collected for disposal by UWF EH&S. Working monitors should be processed through regular surplus computer equipment methods. Old working equipment might be made available to school systems or other organizations that can make use of it. After being picked up from the UWF storage facility, "dead" monitors are stripped of plastic, wiring, and other useable materials before being crushed. The lead, glass and chemicals are recovered - not placed in landfills. Question, comments or requests for recycling can be made to: Peter Robinson, Director, ENVHS (probinso@uwf.edu).

Recycling of Spent Batteries on the UWF Campus

Table of Contents
Provide guidelines to ensure the recycling of spent batteries on the University of West Florida Campus to support our sustainability initiative and to comply with state and federal Universal Waste requirements.
Definitions
EPA – Environmental Protection Agency – Federal Agency that governs and regulates environmental issues.

DEP – (Florida) Department of Environmental Protection – The state agency that regulates environmental issues in Florida. DEP has authority to enforce federal environmental regulations in this state.

RCRA – Resource Conservation and Recovery Act – a federal law that regulates the management and disposal of hazardous wastes.

Hazardous Waste – Any waste material that meets any one criteria of flammability, corrosivity, reactivity, fails a TCLP test, or is listed by EPA as a Hazardous Waste.

Universal Wastes - As defined by EPA, Hazardous Wastes that are subject to the universal waste management requirements in 40 CFR 273, including:

A. Batteries as described in §273.2;
B. Pesticides as described in §273.3;
C. Mercury-containing equipment as described in §273.4; and
D. Lamps as described in §273.5.

Responsibility
This section sets forth the various responsibilities of individuals involved in the process of implementing and maintaining this program.

A. The President of UWF has the ultimate responsibility for ensuring that safety and environmental management programs are implemented and adhered to on campus. The individuals listed below are to act as the President's representatives and handle the day-to-day issues associated with this program.

B. The Provost, Executive Vice President for University Affairs, and Department Heads are responsible for ensuring that faculty and staff are provided with resources and support necessary to provide a safe working and teaching environment and comply with the intent of this program.

C. The Director of Environmental Health and Safety will develop policy and procedure; provide technical support, consultation, information regarding training, and periodic safety and environmental compliance audits.

D. The Faculty and Staff at the University are responsible for oversight of safety and health issues within their areas of responsibility related to the instruction of students.

a. Faculty are responsible for ensuring that students attend training and work safely to ensure students understand the proper management of spent batteries; and

b. Explain proper and safe procedures for management and disposal.

E. Each student, faculty and staff member is expected to attend training and follow procedures and practices outlined in this training guide.
Environmental Procedures
Providing a safe work and learning environment is a fundamental goal of the University of West Florida, as well as providing an environmentally friendly, safe, and sustainable campus. The use of batteries in electronic equipment is essential to the operation, function, and portability of such equipment and technology. However, the proper management and disposal of batteries is essential to prevent pollution to the environment and to comply with regulations.

The following guideline represents a summary of the requirements that must be followed to maintain compliance with UWF environmental requirements.

Recycling of Batteries
A. All rechargeable batteries must be recycled. This includes but is not limited to nickel cadmium (Ni-Cd), lead acid, nickel metal halide (NiMH), lithium, and lithium ion batteries.
B. All non-rechargeable batteries containing lithium, cadmium, mercury, silver, lead, or other heavy metals must be recycled.
C. Traditional non-rechargeable alkaline or carbon batteries are not required to be recycled by regulations.

Management of Spent Batteries
Departments that use portable equipment that generate spent/used batteries on a regular and recurring basis, should establish a collection area to ensure that batteries are collected and managed in accordance with state and federal regulations. Departments that generate spent/used batteries on an occasional basis may contact Environmental Health and Safety (EH&S) for collection information. The improper management and disposal of Universal Waste Batteries is a violation of RCRA and may lead to hazardous waste citations and fines. Therefore, management and recycling of batteries in accordance with the Universal Waste rules is paramount.

Lead Acid Batteries
Lead Acid batteries are found in many types of products. Prior to the disposal of these products, the lead acid batteries must be removed from the equipment prior to disposal and managed for recycling.

The following products may contain lead batteries:
   - Automobiles
   - Lawn Equipment
   - Golf/Utility Carts
   - Fire Alarm Panels
   - Security Panels
   - Computer UPS Systems (Back-ups)
   - Other – Bicycle lights, electric bicycles, misc. equipment.

Lead acid batteries (automotive and sealed gel cells) must be managed in an area that is out of the weather and contained to prevent spills to the environment. Batteries may not be stored on or above the soil without secondary containment.
Each battery must be labeled “Spent Lead Battery for Recycling”, or similar wording.
Each battery must be labeled with its “Out of Service” date.
Batteries may not be stored on site longer than one year from the “Out of Service” date.

**Nickel Cadmium Batteries/Alkaline Batteries**

Nickel Cadmium (Ni-Cd) batteries are found in many types of products. Prior to the disposal of these products, the Ni-Cd batteries must be removed from the equipment prior to disposal and managed for recycling.

The following products may contain Ni-Cd batteries:
- Two way Radios
- Portable Power Tools
- Portable Scientific Equipment
- Portable Electronics
- Cell Phones
- Laptop Computers

When Ni-Cd batteries are taken out of service, they must be placed in a sealed container and dated with an “Out of Service” Date. In lieu of labeling each battery, the container may be labeled with the “Out of Service” date; however, all batteries in the container must be removed from site within one year of the “Out of Service” date. Each container or battery must be labeled Spent Ni-Cd batteries for recycling, or similar. Batteries may not be stored on site longer than one year from the “Out of Service” date. Alkaline batteries may be stored/mixed with the Ni/Cd for recycling.

**Lithium Batteries**

Lithium-metal batteries must be handled carefully to prevent short circuiting causing heat generation and fire. Battery terminals should be covered to prevent contact and short circuiting. Lithium-ion batteries are not as dangerous as lithium-metal; however, caution should still be used. All lithium containing batteries may be placed in the same container. Each container or battery must be labeled Spent Lithium batteries for recycling, or similar. Batteries may not be stored on site longer than one year from the “Out of Service” date.

**Button Batteries**

Four Button batteries may contain silver, mercury, lithium or other compounds. These batteries should be placed in a closed container and labeled as indicated above.

**Recordkeeping**

Disposal and recycling receipts and manifests shall be maintained on file on the Office of Environmental Health and Safety.

**References**

- Governors Executive Order 2000-292
- OSHA 29 CFR 1910
- NCF Safety Policy Statement
- NCF Environmental Policy Statement
- UWF Safety Programs as listed on web: http://uwf.edu/ENVHS/recycling.cfm
- F.S 403.721 Standards, requirements, and procedures for generators and transporters of
hazardous waste and owners and operators of hazardous waste facilities
FAC 62-730 Hazardous Waste
American College and University, President’s Climate Committee
Florida DEP - batteries: http://www.dep.state.fl.us/waste/quick_topics/
publications/shw/batteries/pdf_files/4037192.pdf
HIRING PROCESS

*Description and purpose:* The Hiring Process is critical to the selection of great employees, important in ensuring consistency and compliance in the recruitment process. It is also crucial to strategic planning for the department.

**Searches/Hiring**
The Department Chair or a hiring official designated by the Chair is usually in charge of faculty, adjunct, staff, OPS searches; however, the office administrator will typically assist with the procedures.

**Official Hiring Guide:**

For additional information concerning the university’s hiring policy, please refer to HR-20.00-2004/07 Recruitment, Selection, and Appointment policy.

It is recommended that the office administrator and, if possible, the chair or designated hiring official attend a training workshop on employee searches prior to beginning a search. Contact Human Resources for any training dates. For guidance, contact Jamie Sprague jsprague@uwf.edu, x 2156, in Recruitment for any assistance during the lengthy and complicated process. Also, refer to the Human Resources website for resource information.

**Search Resources:**

**Recruitment**
- Advertising Resources
- Advertising with Graystone
- Applicant Status Changes
- Florida Sunshine Law and Search Committees
- Interview Questions - Behavior-based Examples
- Recruitment Checklist
- Reference Check
- Request for Promotion, Change in Assignment, Demotion, Transfer
- Request for Waiver of Advertisement
- Search Committee - Chairperson - Hiring Official Guide

**Posting a Position:**
Go to *People Admin 7 (PA7)* in this manual for instructions on how to post a search position.

Human Resources policy HR-20.00 allows supervisors to *Hire an OPS Position without Advertising*. When hiring OPS staff with or without advertising, please refer to the *OPS Staff Pay Plan* for classification code and salary.
Essential Documents for Hiring Faculty, Adjuncts, Staff, and OPS

- You will fill out the top section of the Background screening form and applicant will fill out the bottom section of the form, and the applicant will fill out the FRS Certification Form.
- OPS Staff Applicants are also required to fill out an OPS Staff Application.
- When the email from HR arrives with the background check approval, you may then process the essential documents. If the applicant is an adjunct, send in the Adjunct Appointment form (see sample below) along with a copy of the approval email to your college business manager.
- The applicant will fill out the essential documents. These forms should be delivered to Human Resources in Bldg. 20E, 1st door (Due to the sensitive nature of these forms, do not use campus mail.):
  - Action Sheet - You do not fill out this form for faculty, adjuncts, or staff. Make note on the Essential Documents Checklist that the form will be sent to HR by your college business manager. Typically, the office administrator will fill out the action sheet for any OPS staff and send it first to the funding source for approval, to be forwarded to Human Resources. Some examples of funding sources are your college or the Foundation.
  - Essential Documents Checklist
  - W4 form
    - Form I-9--With two current, signed pieces of identification, usually a driver’s license and social security card. (Should be opened in Internet Explorer.)
    - Copy of employee’s signed social security card
    - Loyalty Oath Form - Can be notarized in Human Resources, Bldg. 20E.
    - Statement on Controlled Substance Conviction
    - Additional Employee Processing Information
    - Direct Deposit Authorization with a voided blank check to be delivered to Financial Services in Bldg. 20E, third door.
    - Nautilus Card - Employee takes it to the Nautilus Card Office, Bldg. 20W, so that a Nautilus card with photograph may be issued to the employee.
    - UWF Employment Policies - Either print or email these policy forms to the employee for viewing.
- If the employee lives out-of-town, he/she will have to take the I-9 and the Loyalty Oath to a Notary. The Notary will fill in the section that you usually sign, but does not put in the start date. The Notary looks at the documents (usually driver’s license and signed social security card) to verify the identity of the applicant. See I-9 Remote Location Process. The employee will have to mail all essential documents to you.
- Once the essential documents have been processed you can find out if the employee is in Banner, go to MyUWF Information Navigator OHR000011 Employee Summary to see if the name appears and to get the Banner ID number.
- After the employee is in Banner, send an email to the Registrar’s office to Kendra Loucks, kloucks@uwf.edu, to request that the new employee be added as instructor of record (IOR) for the classes being taught.
- At the end of each semester, adjuncts are evaluated by the Chair of the department. The Adjunct Faculty and GA Review Form can be found in FACS (Faculty Academic
Credentials System). Print the form and have Chair fill it out. Return the signed form to the Dean’s Office. Keep a copy for your departmental record (Sample).

![Adjunct Appointment Form](image)

**Essential Documents for Hiring Students**

- [Essential Documents Checklist](#) for students
- [Student Personnel Action Form](#) – typically filled out by the office administrator.
- [Student Information and Declaration Form](#)
- [Loyalty Oath](#)
- [Direct Deposit Form](#) – along with a voided blank check for each account.
- [W4 (2015)](#)
- [I-9 Form and instructions](#) – should be opened in Internet Explorer

**What Must Be Placed in the Official Personnel File Prior to Hiring?**

As the hiring process progresses, the documentation required for the Dean’s Office personnel file should include the following as noted below:
A. Regular line item faculty
1. Letter of offer
2. UWF-SACS Faculty Qualifications Worksheet
3. Contract
4. Assignment letter
5. Most recent evaluation
6. Official ORIGINAL transcripts*
7. Curriculum vitae
8. Letters of recommendation (minimum two letters from outside UWF) SACS Credentialing and FACS Database Meeting Notes and Expectations from 7-9-2014
9. Other documents supporting decision to hire**
10. Information uploaded to FACS Database

B. Adjuncts
1. Letter of offer/assignment letter
2. UWF-SACS Faculty Qualifications Worksheet
3. Most recent evaluation (completed at the end of each semester)
4. Official ORIGINAL transcripts*
5. Curriculum vitae
6. Letters of recommendation (minimum two letters from outside if not a UWF graduate)
7. Other documents supporting decision to hire**
8. Information uploaded to FACS Database

C. Graduate Teaching Assistants
1. Letter of offer/assignment letter
2. UWF-SACS Faculty Qualifications Worksheet
3. Most recent evaluation (completed at the end of each semester)
4. Official transcripts (Bachelor degree transcript information may be printed from CICS)
5. Curriculum vitae
6. Letters of recommendation (minimum two letters from department faculty)
7. Other documents supporting decision to hire
8. Information uploaded to FACS Database

*Transcripts must come from the issuing institution – They cannot be addressed to the prospective faculty or adjunct, no copies, cannot be stamped “Issued to Student.” In some cases, the faculty member may have requested original transcripts be sent to UWF Human Resources. In these cases, a copy of the original transcript(s) is acceptable if a notation is placed in the file which states that the original transcript(s) are housed in HR and have been verified.

**If the transcript does not contain the required credentials that qualify them to teach, then discipline based documentation or other contributing evidence must be submitted (portfolio, service records, publications, research in the teaching field).
INFORMATION NAVIGATOR

Description and purpose: Information Navigator gives you access to reports that pertain to departments such as Budget, Financial Services, Procurement, and Human Resources.

The three letters in the report ID indicate the department related to the report. The number indicates the actual report. The following reports are regularly used by office administrators, though there are other reports that you may also like to access:

- **FIN000001 Departmental Activity** – This report shows all the income and expenses related to a particular index for a particular month. This is your transaction journal for your accounts.
- **FIN00010 Outstanding Travel Incumbrances** – This report shows all the outstanding TARs for a particular index in your department. This is where you find your TAR number.
- **PROC000004 PCard Auto Post** – This report shows all the names of PCard users who will auto post on the date above their name. If your PCard purchase has been correctly posted to Banner, your name will not appear on this list.
- **PROC000035 Commodity and Account Codes** – This report lists all the commodity codes and Accounts codes for the University. You need this information to fill out the posting label for all PCard purchases.
- **OHR000011 Employee Summary** – This report gives employee information for each employee in your department. This report is useful to let you know if a new employee is in the system and what the position number is.
- **PRO000007 PCard Reconciliation** – This report is printed out each month by PCard approvers to give to their PCard users to compare with their records.
The screen shot on the previous page is a list of favorite printouts. You can create a favorites list by going to **Show All**, then hitting the **Add to Favorites** link to the right of any report that you may want to mark as a favorite. When you are in the Show All view, you can return to your favorites by taking the My Home option at the top of the page.
ITS WORK ORDERS

Description and purpose: The ITS Help Desk provides UWF technology support Monday - Thursday from 8:00 am to 10:00 pm and Friday from 8:00 am to 5:00 pm. Read more about our coverage schedule.

Contact Us
(850)474-2075
helpdesk@uwf.edu
Building 79

When you dial x2075, identify yourself with your ArgoNet UserName and department. Usually, the ITS representative can help you while on the phone. You can give the ITS Rep access to your computer via Internet by following his/her directions given. Often the Rep will be able to resolve the problem that way. If he/she is unable to resolve the problem, a work order will be made to send out a tech repair person to try to fix your computer. There is no cost to the department for computer and printer repairs if the computer is under warranty. If the equipment is no longer under warranty and the replacement part is over $100.00, then the department will be charged for the part.

Remember, the ITS Rep is available to assist you in all your computer/printer questions:
1. Computer or printer malfunctions
2. Advice on shopping for computer accessories (Such as a keyboard and mouse)
3. Unsure if an email is fraudulent
4. Concerned that you may have been attacked by a computer virus
5. You need a program that is available to UWF staff installed into your computer

If you need guidance in purchasing a computer, printer, or any expensive computer-related item, please contact your local support provider in your college for guidance. You can obtain this information for your department by going to:

MyUWF, type in “ITS” in the search bar, click on Technology Support Providers
Help Request Forms

All Help Request Forms are directly routed to the workgroup responsible for your request. Do not include any sensitive information (ex. SSN) in your request. If you have questions, please contact the ITS Help Desk at 474-2075 or helpdesk@uwf.edu. Here are our response times.

I have a technical problem
Hardware Problem
Network Connectivity Problem
Printer Problem
Software Problem
Telecommunications/Telephones
Other Problem

I have a standard technical request
Banner - Add Data to ODS
Google Calendar Location/Resource Request
Hardware Installation/Setup
IP Request
Software Requests - eDesktop and ITS Managed Computer Labs
Software Installation - Workstation
Telecommunications/Telephones
Other Assistance Request

I want to request system access
ArgoNet Account Request
Banner Access Request
Banner ODS Access Request

ITS Request System

Requests for new reports, systems, services, or enhancements
All requests will be evaluated and prioritized by the system liaison. You may check the status of your request by clicking the Existing Requests link.
If your request is to include a system or application which stores, views or reports SSN data, you must fill out the SSN Exemption Form and obtain proper approval before ITS can work on your request.

Enter New Request
My Requests

Prioritization of major projects
Requests requiring more than 80 hours of work are prioritized by a cross-functional team.
1. All requests must first be submitted using the Enter New Request form.
2. If ITS deems your project “major,” you will be asked to submit a Proposal Form.
3. The prioritization process is a joint enterprise among ITS,
ITS Help Request Form - Other Problem

Contact Information

Full name: Gabriela Grosse  Full Email Address: ggrosse@uvf.edu
Building: 0060  Room Number: 0105
Phone: 474-2961

Other Problem
Please enter a complete description of the problem below.

If a password is required to complete this work: I will be present at service time to enter my contact information.

Schedule an appointment prior to sending a technician? No  Yes

Problem Description

If you have questions about your request, please contact the ITS Help Desk.

Submit  Reset
JOURNAL ENTRY FORM PROCEDURES

Description and purpose: A journal entry is an Accounts Payable form used for the following purposes:

1. To correct a previously posted entry that appears in Departmental Activity. For example, you bought some equipment and intended to charge the purchase to your department’s carry forward index, but charged it to your department’s E & G index instead.

2. To split the cost of a goods or service between two or more departments. For example, the first department purchases an item that will be used by itself and a second department. The first department will create a journal entry charging the index of the second department for a portion of the purchase.

3. A department provides a service to other departments and uses a journal entry to charge the other departments.

4. Departmental users should use the procedures listed below when processing a Journal Entry. The JE form is located at http://uwf.edu/financial/Form_JournalEntry.xlsx or go to MyUWF and enter Journal Entry in the search bar.

5. Only transfer expenditures that occurred in the current fiscal year, July 1 – June 30. Once the fiscal year is closed, you cannot transfer the expenditures in the next fiscal year. The only exception to this is for Sponsored Research expenditures, and these will be reviewed on a case-by-case basis.

6. Only transfer the amount of an expenditure that was charged to your index. You may transfer less than the original amount but cannot transfer more than your index was charged.

7. A journal entry is not the appropriate method to use for correcting amounts deposited in the Cashier’s office. A receipt correction should be used.

8. All fields of the Journal Entry form are required except the Activity Code field.

9. The Original Document Number field must be completed only if you are transferring expenditures from one index to another. The Original Document number can be found by reviewing your Departmental Activity Report. For PCard transactions, the Original Document Number begins with an “S”. For invoice transactions, the Original Document Number begins with an “I”.

10. The user must complete the Purpose of Journal Entry field.

11. In the Debit/Credit field input a “D” for Debit or “C” for Credit. Please do not type the words Debit or Credit.
12. The amount of Debits must equal the amount of Credits.

13. If you are transferring an expense from one index to another, input a “D” for Debit on the line that contains the index you are moving the expense to and a “C” for Credit on the line that contains the index where the original expense occurred.

14. Do not include dollar signs ($), or commas (,) in the Amount field or in the Transaction Description field.

15. Please limit the Transaction Description field to 35 characters or less.

16. The Research and Sponsored Programs Office must approve journal entries that include indexes beginning with 16, 18, 21, or 22. Email journal entries with these index codes to bbrown3@uwf.edu and dfrazee@uwf.edu. Once the journal entry is approved they will forward it to accountspayable@uwf.edu.

17. The UWF Foundation must approve journal entries that you want charged to a foundation account. Email journal entries to ebutts@uwf.edu. Once the journal entry is approved they will forward it to accountspayable@uwf.edu.

18. Email all other Journal Entry forms to accountspayable@uwf.edu.

19. If you have questions about how to complete the form, please contact Billy Pollard at 850-474-3025 or wpollard@uwf.edu or email accountspayable@uwf.edu.
### JOURNAL ENTRY FORM

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>D460</td>
<td>70910</td>
<td>Nov 12 postal charges</td>
<td>100.00D</td>
<td>6/123456</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>CF2460</td>
<td>70910</td>
<td>Nov 12 postal charges</td>
<td>100.00C</td>
<td>6/123456</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**DEBITS MUST EQUAL CREDITS**

**These are all sample entries**

---

**Purpose of Journal Entry (Required):**

Transfer airline and postal charges to the correct index

---

**Email completed journal entries to account payable@uwf.edu. For questions please contact Billy Pollard at ext 3025.**

**Get original document number when transferring expenditures from one index to another. Original document number is not required when charging another department for services.**

**Journal entries that include indexes beginning with 16, 18, 21, or 22 must be sent to Research and Sponsored Programs for approval. Email journal entries to dranzel@uwf.edu and birevon3@uwf.edu.**

**The UWF Foundation must approve journal entries that are charged to the Foundation. Email journal entries to foundation@uwf.edu.**

---

**Revised 9/20/13 B Pollard**
KEY REQUEST

Description and purpose: A Key Request is submitted for a new employee or a change in an existing employee position to allow access to an office/building.

1. Facilities Maintenance has one locksmith on campus.

2. To order a key, log into MyUWF and type “key request” in the search.

3. If you are requesting a key for someone who has not yet been entered as an employee in Banner, print and complete a Paper Key Request Form and route it manually.

4. If you are requesting a MASTER or SKD key, please print and complete a Paper Key Request Form and route it manually.

5. Attach a memo of justification for your request to the Key Request Form. Contact Facilities Maintenance with any questions.


Electronic Key Request

- my home
- my proxies
- Search
- Help

If you are requesting a key for someone who has not yet been entered as an employee in Banner, please print and complete a Paper Key Request Form and route it manually.

If you are requesting a MASTER or SKD key please print and complete a Paper Key Request Form and route it manually. Please attach a memo of justification for your request to the Key Request Form.
### ELECTRONIC KEY REQUEST

Choose one of the options below. If you are submitting this request for someone else, please enter their ArgoNet UserName.

<table>
<thead>
<tr>
<th>Option</th>
<th>ArgoNet UserName:</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am submitting this request for myself</td>
<td></td>
</tr>
<tr>
<td>I am submitting this request for an employee</td>
<td></td>
</tr>
<tr>
<td>I am submitting this request for a student</td>
<td></td>
</tr>
</tbody>
</table>

Optional - Name your Key Request  

*What’s This?*

Submit
LEAVE REPORTS AND TIME SHEETS

Description and purpose: It is an employee’s responsibility to timely and accurately report their hours worked and/or leave taken. Time Sheets and Leave Reports are official pay documents. They should be completed and submitted only by the employee and should be an accurate reflection of hours worked or leave taken. Deliberate misrepresentation of time and/or leave is considered falsification of records and can be grounds for dismissal.

The following links to Confluence will give detailed instructions about leave reports:

1. Submitting a Leave Report
2. Submitting a Time Sheet
3. Approving Time Sheets and Leave Reports

Time Sheets are submitted bi-weekly by Non-Exempt employees to report time worked, annual or sick leave. They should not work beyond their established work hours unless specifically authorized by their supervisor. They also should not work over forty (40) hours per week, all jobs combined, without advance approval by their supervisor.

Leave Reports are submitted bi-weekly by University Work Force Exempt (salaried) employees for only those work periods in which they have exceptions or use leave, (sick leave, annual leave, time away from teaching for research, etc.) These situations usually only occur when faculty are very ill for months at a time (such as prolonged medical treatment) and are not teaching or are only teaching part-time. They must account for the time otherwise and use their sick leave hours. Go to MyUWF and in the search type Leave Report.

OPS salaried/exempt employees who are absent from work for one or more full days for personal reasons, should submit an OPS Effort Recap/Time Sheet to have those hours deducted from their salary, if they are not otherwise able to make them up later in the same work week.

If you are unsure whether your position is classified as non-exempt or exempt, your hiring manager can clarify this for you.

UWF uses the Banner Self-Service Web Time Entry system. This system allows you to log into a secure website and submit your Time Sheet or Leave Report online from any computer with access to the Internet. Your Time Sheet or Leave Report will then be approved online by your supervisor or their designated proxy and sent electronically to Payroll for processing. The Web Time Entry deadline is typically every other Monday at 10:00 a.m. However, it may be earlier due to university holidays. See the Payroll Calendar for a complete list of pay periods and Web Time Entry deadlines.

If you do not submit your Time Sheet by the bi-weekly deadline, you will no longer have access to the online Time Sheet for that period and must submit a paper Effort and Leave Recap form in order to submit your hours. You will also need an Effort and Leave Recap if you need to make
changes to a previously approved Time Sheet or Leave Report. Contact your supervisor or Human Resources immediately, if you have a need for this form.

To enter your time, go to MyUWF/search and type in “timesheet” and the following accesses will be available.

Click on Time Sheet and the information below will be displayed. To submit your own timesheet, choose Access my Time Sheet: and click on Select. To approve time sheets for those who report to you, choose “Approve or Acknowledge Time” as noted below.

Once you click on Select at the bottom left of the page, a new page will be available for you. The current or last pay period is displayed. Click on Select to choose the correct pay period to approve.
Click on the employee’s name to select.

The hours per day will be displayed.

Click on Approve (if you agree with the number of hours worked) and the hours will be submitted to Human Resources.

For more information on Time Sheet or Leave Report submittal, go to Confluence: https://confluence.uwf.edu/display/BPL/Approving+time+sheets+and+leave+reports

Leave Balances

To view your leave balance go to MyUWF and in the search type “leave balance.” You will be able to view the following: Administrative Leave, Annual Leave, Sick Leave, Leave Without Pay, Military Leave, Overtime, Sick Leave Pool, and Comp Time. If you have any questions or concerns contact Human Resources.
Leave Reports

Leave Reports are to be used by faculty and other salaried employees to report sick leave, or if someone is taking time away from teaching for research or whatever, they may need to report leave without pay. These situations usually only occur when faculty are very ill for months at a time (such as cancer treatment) and are not teaching, or are only teaching part-time, they must account for the time otherwise and use their sick leave hours. Go to MyUWF and in the search type Leave Report.
Pay Stub

- Every other Friday on pay day, you, faculty and students are able to view and/or print out a pay stub.
- You will receive an email the night before from Human Resources with directions how to view your pay stub.
- You can also view your pay stub in MyUWF.
- Log in to MyUWF and in the search type “pay stub.” Choose the pay stub year and view each pay period for the past year. You will be able to view summary, earnings, benefits, deductions, taxes, direct deposit amount, annual leave, sick leave, etc.
- Contact Payroll with any questions.

Choose a year and then select Display.
You may view your past earnings statements (through 12/31/2004) from the Bureau of State Payrolls web page.

Earnings Statements after 12/31/2004 may be viewed by clicking on the "Display" button below.

Pay Stub Year: [2013]

[ Earnings History | Deductions History ]
MAJOR CHANGE/MINOR & DECLARATION OF MINOR

Description and purpose: A student can change his or her major for many reasons. The student should discuss changing their major or minor with their academic advisor. A list of majors and minors can be found in the Undergraduate Academic Catalog.

Instructions

1. Majors:
   a. New for Fall 2011, undergraduate students may now change majors online by accessing the Major Change app in MyUWF. There may be some exceptions where the student may not change the major online. In those situations when the online major change is attempted, the student will be redirected to a paper form to print, complete, and submit to the Registrar, Building 18. Change of majors should be submitted prior to the end of Drop/Add deadline for the major to be applicable to that semester. The complete Change of Major policy is located in the online academic catalog.
   b. Graduate students who wish to change degree programs should contact the Graduate School. A list of graduate programs can be found in the Graduate Academic Catalog.

2. Minors:
   a. Undergraduate students who wish to declare a minor may do so by printing and completing the Major/Minor Change Form on the Office of Registrar’s website. Completed forms should be submitted to the Registrar, Building 18. Minor declarations should be submitted prior to the end of Drop/Add deadline for the minor to be applicable to that semester.
   b. Students who wish to delete a minor may do so by accessing the Major Change app in MyUWF.
   c. The complete Minor policy is located in the online academic catalog.

3. All forms are located on the Office of The Registrar’s website. 
   http://uwf.edu/offices/registrar/registration/majors-minors/
INSTRUCTIONS TO STUDENT:

Please complete all applicable blanks; print clearly. Email confirmation will be sent to your UWF email account after changes are made.

UWF ID Number: __________________________ Name: __________________________

First __________________________ Middle Initial: __________________________ Last

UWF E-mail: __________________________ Phone Number: (__________) __________________________

*Are you a(n) Veteran ☐ Student-athlete ☐ N/A? (Not Applicable) ☐ UWF GPA: __________________________ Total Earned Hours: __________________________

*Veteran/Athletic Advisor Required Signature & Printed Name __________________________

Date: __________________________

Student Agreement:

By submitting and signing this Undergraduate Major Change Form, I acknowledge the requirements of my new major. I further acknowledge I could prolong my degree completion and be subject to an Excess Hours Surcharge (Florida Legislature, Section 1009.286).

Student Signature: __________________________ Date: __________________________

Major Change/Declaration

Advisors must list the correct code for the new major. Incomplete forms will be returned to the department.

Current Major: __________________________ New Major: __________________________

<table>
<thead>
<tr>
<th>Name</th>
<th>Major Code</th>
<th>Catalog Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>__________________________</td>
<td>__________________________</td>
<td>__________________________</td>
</tr>
</tbody>
</table>

Academic Advisor __________________________ Printed Name & Signature __________________________

Date: __________________________

Double Major and Dual Degree Declaration

Double Major: (seeking one degree, e.g. BA, with two separate majors concurrently, e.g. BA in Psychology, and a BA in Sociology) Students must declare a major in each department (as applicable) and be assigned an Academic Advisor in each discipline. After successful completion of all requirements for both majors, students will be awarded one degree (e.g. one B.A. or one B.S., etc.) with two majors listed on the diploma and transcript. Consult each department for a detailed program of study. Refer to the University Catalog for further information.

Dual Degree: (seeking two different degrees (e.g. BA+BS, BSBA+BA, etc.) and graduating with both simultaneously). Students must be assigned an Academic Advisor in each discipline. After successful completion of all requirements for both majors, students will be awarded two separate diplomas (e.g. BA and BS, etc.). Consult each department for a detailed program of study. Refer to the University Catalog for further information.

Primary Major/Code: __________________________ Secondary Major/Code: __________________________

<table>
<thead>
<tr>
<th>Department Chair</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>__________________________</td>
<td>__________________________</td>
</tr>
</tbody>
</table>

Primary Major

Printed Name & Signature __________________________

Secondary Major

Printed Name & Signature __________________________

Date: __________________________

Minor Declaration

(1) New Minor/Code: __________________________

(2) New Minor/Code: __________________________

<table>
<thead>
<tr>
<th>Academic Advisor</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>__________________________</td>
<td>__________________________</td>
</tr>
</tbody>
</table>

(1) Minor

Printed Name & Signature __________________________

Date: __________________________

(2) Minor

Printed Name & Signature __________________________

Date: __________________________

Minor/Major Deletion

To be completed by student; delete a Minor, a Dual Major, or an Additional Degree.

Delete Minor(s): __________________________ Delete Major: __________________________

REGISTRAR (Office Use Only)

Effective Semester/Catalog Year: __________________________ Initials/Date: __________________________

BANNER Rev. 08/26/2014
MATERIAL & SUPPLY FEE AUTHORITY AND PROCEDURES

Description and purpose: Florida Statute 1009.24 (14) (i) authorizes each university Board of Trustees (BOT) to establish fees “to offset the cost of materials or supplies that are consumed in the course of the student’s instructional activities, excluding the cost of equipment replacement, repairs, and maintenance.” Any academic program seeking to implement a new or to change an existing material and supply fee must submit a “Material & Supply Fee Request Form” documenting planned expenditures and the proposed cost per student. (http://uwf.edu/academic/policies/fees/)

Please note that requests for new, or changes to existing, fees will only be accepted every other year beginning in 2014.

Justification for the fee must include how the material or supply is integral and required to the instruction of the course and how they will be used by the students. Fees should be proposed only for those courses which will be offered on a regular basis, rather than for one-time special topics courses. Fees lower than $3.00 or greater than $48.00 per course will not be approved.

Requests for new or increases to existing fees must be approved by the College Dean and then forwarded to the Provost for approval and submission for final approval by the BOT. The forms are to be submitted to the Office of the Provost no later than January 17 for fees to be implemented at the beginning of the Fall term. If approved by the BOT, the following offices will be notified by the Provost’s Office for appropriate action: Dean’s Office, academic department, and Registrar’s Office.

To make a request to delete or reduce a fee, the Dean’s Office should send an email notification to the Office of the Provost for appropriate action no later than January 17.

The material and supplies fees are incorporated into the tuition and fees for the students who register for the course and then credited to the auxiliary account of the department offering the course. All fees for a particular department or discipline will be deposited into a single auxiliary.

Course fees are to be expended during the term collected. The academic unit is responsible for ensuring that expenditures and revenues in the auxiliary are consistent with the original basis for the fees and that adequate records are maintained to track expenditures by course.

If cash balances at the end of the annual year (12/31) exceed annual year revenues by more than 15%, course fees will be suspended for the following Fall semester. The Office of the Provost will notify the Registrar’s Office to suspend fees and a copy of the notice will be sent to the appropriate college and department. Fees will be reinstated via notification from the Office of the Provost to the Registrar’s Office once balances comply with the 15% requirement.
If an auxiliary account does not already exist, the department must submit an “Activity Request Form” to the Office of Financial Services. The form and instructions can be found on the OFS website (http://uwf.edu/financial//Form_ActivityRequestFormandInstructions.docx).

**Guidelines**

1. Proceeds from the charge must be used solely to enhance the budget provisions already in place. This means new fees may not be used to supplant existing material and supply expenditures. For courses that have previously been taught, care must be taken to carefully justify how the income will be used to enhance the existing course. Use of M&S fees to cover costs currently paid by the department is forbidden.

2. Equipment purchases, refurbishing, and repairs are expressly prohibited.

3. Materials and supplies purchased with these funds must be consumable by the student over the duration of the course. This term broadly interpreted to include paintbrushes, drawing instruments CD’s, software, etc. that becomes the property of the student.

4. Fees may not be charged for x990 courses unless a CCR has been submitted for the course and the identical course title is identified on the M&S certification signed by the president.

5. All material and supply fees are refundable if the student drops the course during the Drop/Add Period or receives a partial or full refund of fees. We have no way to force students to return unused material before collecting the refund. If the nature of your material and supply items permit, departments may want to issue supplies during the semester instead of at the first class meeting.

6. If a material and supply fee is assessed and the funds not spent, we are obligated to refund the fee to the student. This is a difficult chore and we prefer not to have to accomplish it.
MEMBERSHIP DUES

Description and purpose: Membership dues are required for various department/organizations across campus. These may be to join educational societies, organizations, or other entities for members of your department. Example: Society for College and University Planning (SCUP), American Academy of Underwater Sciences (AAUS), etc.

1. Organizational Membership Dues are to be paid by UWF PCard. If the organization does not accept credit cards, the dues are paid by Direct Pay Request Form (PDF).

2. Before membership dues are paid, an Open Records Certification Form (ORC) (PDF) must be on file with Accounts Payable in the Financial Services Office.

   List of ORC Forms on File (PDF)

3. When an organization is not listed, the requesting department must obtain the ORC form and provide it to the Accounts Payable Office in order for the organization to be added to the "List of ORC Forms On File".

   If payment is being made by PCard, send the new ORC form with a memo stating the dues will be paid by PCard.

4. If payment is being made by a Direct Pay Request, send the new ORC form with the completed Direct Pay Request.

IMPORTANT:

- Membership dues cannot be paid with State funds if the organization does not complete the ORC Form.
- Use Commodity Code 00096201 only for payment of membership dues.
MESSAGE COMPOSER (Supersedes GroupMail)

Description and purpose: Message Composer is the replacement for GroupMail. It will allow departments or certain individuals who have been given access, to send email messages to defined populations of students and/or staff and/or faculty and administrators. Advisors can use Message Composer to email their advisees, and instructors can send emails to course sections via Message Composer.

In MyUWF search for Message Composer and click on the app.

To create a new Email message, click the “New Email” button on the Email tab.

The user will be taken to an email specific form where the message can be created and population chosen.

There are multiple steps in creating a message and all are listed at the top of the form. Each step must be completed in a specific order. Composer will prevent advancing to the next step in the process until the current step has been completed. Depending the security level the user possesses, there may be three or four steps to the process.

- The first step is message creation. -- This is where the message name, subject and body are defined.
- The next step is selecting a population or the people who will receive the message. - Depending on security level, some users will be able to further filter the population and define actions to be taken prior to sending the message.
- The last step is reviewing the message and sending.

Message
This step creates the email message.

Message Name - defines the name of the message. Since each message is saved and displayed in the initial Composer home screen, a Name must be defined for each message. The name should be descriptive and will aid in finding and reusing the message in the future.
**Subject** – This will display in the subject line of the email. This form field can include Velocity text. In short, Velocity ([http://velocity.apache.org/engine/devel/user-guide.html](http://velocity.apache.org/engine/devel/user-guide.html)) is a templating engine that makes it easy to personalize messages for each user. It takes advantage of data in the population by inserting it into the subject.

**From** - This will be displayed in the emails “from” field. The field defaults to the logged in user and this field can only be changed by an "Email Admin".

**Message** - This is the body of the message and can contain HTML. This field can also take advantage of the Velocity programming language. To edit the HTML directly, click the "<HTML>" button.

**Comments** - This comments field is only visible in Composer and can be used for any notes about the message.

**Business Process** - A business process is not a required field, but can be used to help with linking this message with the different systems and process a department may have.

**Message Preview button** - At any time during the message creation, clicking the "Message Preview" button will display an example of the message.

**Cancel link** - This will take the user back to the Composer home screen without saving changes.

**Save Message / Next button** - This will save the message and take the user to the next step: adding a population.

See illustration below.
**Show Advanced Features** - this link will expose form fields that are not required.

**Filter Key** - The filter key is used by the mercury engine to limit the users who will receive the message. The Mercury engine will not send the same message to the same user twice where the filter keys are equal. For Example: if the filter key is the current term, the Mercury engine will send the message once to the user in the current term. Once the term changes, the user will get another message.

**Message Owner** - This defines who owns the message. The default is the current user, but each department the user belongs to will also be listed in the dropdown. By changing the message owner to a department, all users within the department will have access to the message as well.
Population
A population is a SQL or PL/SQL view, table, or table function. This is the list of users that will receive a message. The population must contain a few required columns (filterKey and UWFID) that are used by the Mercury engine to send messages. The population can contain any number of other columns that can be used to individualize and enhance each message. The information in these extra columns can be added to the subject or body of the message by using the Velocity programming language.

Populations are secured to groups and the user can see the populations they have access to by going to the "My Access" link at the top of the Composer page.

To add a population, choose one of the listed populations from the dropdown. Only population the user has access to will be listed in the dropdown.
When choosing a population from the dropdown, each selection will display the description of the population and open a form to add or further limit the population.

![Population screenshot]

Once a population has been added, it will display in the population table. Other populations can be added or current population can be deleted as needed.

![Population table screenshot]

Once the user has finished adding populations, click the "Next" button.
Review and Send
This is the last stop before sending the message. The first thing the user will see is an example of the message that will be sent. This is before the message has run through Mercury engine so Velocity text has not yet been transformed to the user specific text.
Carbon Copy
A carbon copy can be sent to yourself and/or department. List as many email addresses as needed, separated by a comma. Below is an example of a message that was received through carbon copy.

![Original message]

Message information such as: how many sent, sent by who and at what time. Also a list of email address that were carbon copied

Action Buttons
There are three action buttons at the bottom of the page.

Send Test Email to Myself - will do just that, send an email to the logged in user with the subject and body of the message just created. The user will have the options of adding other emails to receive this test message.

![Send a Test Email]

An email will be sent to: mjohnson3@uwf.edu
Additional addresses to receive this test:

jsmith@uwf.edu, jdoe@uwf.edu
Show Targeted Recipients - Clicking on this button will display how many people are in the population after any filtering. To remove any individuals from this population, follow these steps: Removing a name from a population

Send Message - Clicking this button will send the message to the chosen population. One last pop-up box will ask if you are sure the message should be sent, selecting yes will send the message.
MyUWF

*Description and purpose:* MyUWF, [https://my.uwf.edu](https://my.uwf.edu) is the web portal of the university. It is the secure personalized information system and is available 24 hours a day from any computer with Internet access and browser software. It is available to the university community: students, prospective students, employees, and alumni.

The portal contains information and all of the online services you need to be an active member of the UWF community. Once you join UWF as a student or employee, you receive access to MyUWF. ArgoNet accounts provide access to the portal, so you must have an active account (UWF UserName and password) to access the secure services. To find MyUWF, use the green MyUWF button at the top of university web pages, or log into MyUWF at [my.uwf.edu](http://my.uwf.edu).

Understanding the layout of MyUWF and using the Search features will allow you to quickly find what you need. Review the information below and take time to familiarize yourself with the MyUWF Tour.

1. **MyUWF Default Home Items** - A core set of services for your role(s) (student, faculty, etc.) appears on the home page by default and cannot be removed. Starring a default app moves it to the top of the Home Items list. *Gmail for Faculty & Staff* and *Gmail for Students* are examples.

2. A – Z Index - The *searchable Index* contains those online services that are specific to your role at the University. The information you see will differ depending on whether you are faculty, student, or staff. Services that you frequently access can be added to your MyUWF home page items by clicking the star next to the app. Search for these helpful services: your UWF *File storage* space and *Web hosting* area, *eLearning* classes, and the *eDesktop* virtual computer lab. Locate the *Campus Directory* of departments, organizations, and people or the *Training Reservation Desk* to make a reservation.

3. **Collections, Student** - The *A to Z Index* contains several collections of services. Any tool in the collection, if starred, appears at the top of the list of your home page items.

   - **Financial Resources (for students)** - Collection
     *Financial Aid, Student Accounts, Nautilus Card,* and more.

   - **Registration** - Collection
     *Course Catalog, Advising Status, Registration Menu,* and more.

   - **Social Involvement** - Collection
     The UWF community: *ArgoPulse, Athletics, Recreation, The Voyager, Student News,* and more.

   - **Student Resources** - Collection of Technology Tools
     *eLearning, eDesktop, Centralized File Storage,* and more.
4. Collections, Employee - The A to Z Index contains several collections of services. Any tool in the collection, if starred, appears at the top of the list of your home page items.

**Employee Self-Service** - A Collection for Employees
This collection of tools and information is specific to you: Leave Balances, Leave Report, Time Sheet, Pay Stub, Tax forms, and more.

**Instructor Resources** - A Collection for Faculty
This collection of tools is designed for instructors: eLearning, Grade Submission, ClassMate, Classroom List, and more. ClassMate contains information about your courses including class rosters, final exam date/time, and student GroupMail. ClassMate is the place to post your online syllabus, set technology codes, and request a technology-enhanced classroom.

**Employee Resources** - A Collection for Staff
This collection of tools is used by employees: Banner ERP System, Information Navigator, RouteIt, Employment/Position Management, and more.

5. My Messages - Important messages that require your action or acknowledgement.

6. Notifications - Some apps, like Leave and Time Approval, can sense when there is something that needs your attention. If an app senses that you have action items, the app will appear in the Notifications section of the home page. In the apps list, the app icon will display a numbered badge indicating the number of items waiting for your action.

7. Information Technology Help - The Technology Self-Help Resources collection of apps contains a number of different resources for obtaining IT help. These include the ITS Help Desk, request forms, technology alerts, and a complete list of who to contact if you have a problem.

8. Featured - New and timely apps are Featured on the home page and highlighted in the app listing. Look for Grades to be featured once they are posted, and Parking Permits to be featured when it's time to renew.

9. Department apps – Occasionally, it is necessary to display a MyUWF app only for a single department, thereby preventing members of all other departments from seeing the app in MyUWF. Please note the following:

   a. Apps can be displayed only for all departments or a single department (e.g., an app cannot be limited to two departments).

   b. This procedure only limits who can search for and view the app in MyUWF. This procedure does not prevent outside departments from accessing the app if they know the app URL. In most cases, Item Privacy is not necessary because department-specific apps adequately obscure in the A-Z listing.
OFFICE HOURS

Description and purpose: Professors and teaching assistants normally schedule time outside of class to meet with students. Office hours are times when you can meet to discuss material presented in class or other related interests. Course-related discussions may include asking for extra help, seeking clarification of material present in class and following up on aspects of the class. Students may also discuss majors and programs of study, graduation requirements, summer internships, graduate school, campus events and more.

1. Faculty and staff are required to hold office hours. Staff are typically in the office each day from 8:00-5:00; however, some hours may vary slightly.

2. Every department has a set number of office hours per departmental bylaws for faculty.

3. Faculty office hours are posted on each professor/instructor’s door typically by the office administrator or assistant no later than Friday of the first week of classes (last day of Drop/Add).

4. Make office hours available in the main office as well so students can view them. Office hours are to be spread out during the week so faculty are accessible to students at various times or by appointment.

5. Faculty office hours should also be on the syllabus so students can make contact with them.

6. If a professor cannot keep office hours on a certain day or time they will notify you to put a note on their door so students are aware and if the student needs immediate assistance he/she can see you.

7. The Center for University Teaching, Learning, and Assessment (CUTLA) has pointers for faculty office hours at [http://uwf.edu/cutla/office_hours.cfm](http://uwf.edu/cutla/office_hours.cfm) if new faculty needs assistance.
OUTSIDE ACTIVITY AND CONFLICT OF INTEREST FORM

Description and purpose: Outside activities are defined as activities, whether compensated or not, which are not part of the employee’s assigned duties and for which the University has provided no compensation. The Outside Activity/Conflict of Interest Form (there is one form for both Academic Affairs and Non-Academic Affairs employees) may be accessed by visiting this link.

In general, employees of the University of West Florida are permitted to engage in outside activities. The University of West Florida’s Conflict of Interest Policy, AC-11.02-05/13 (https://nautical.uwf.edu/unitapp/publication/Pub.cfm?PubFormatID=1152), provides guidance to employees seeking to engage in outside activities. In accordance with the Policy, employees are required to report their outside activities to the University and obtain approval to participate in these activities prior to engaging in them. (The approval process takes approximately 30 days, so please plan accordingly.) Outside activities are those activities, whether compensated or not, which are not part of the employee’s assigned duties and for which the University has provided no compensation.

A conflict of interest arises when an individual’s private interests (such as outside professional or financial relationships) might interfere with his or her professional obligations to the University of West Florida. Such situations do not necessarily imply wrongdoing or inappropriate activities.

However in a university setting, they can compromise or be perceived as compromising important academic values, research integrity, or the University’s mission. This mandates that such conflicts or potential conflicts be disclosed and then managed, mitigated, or eliminated.

All employees, including student employees and OPS employees (“employee(s)”), engaging in outside activities requiring disclosure must complete this Outside Activity and Conflict of Interest form. (This applies to all employees regardless of funding source.)

When Must A Form Be Submitted?

An Outside Activity and Conflict of Interest form must be submitted,

- each time an employee plans to engage in a new activity requiring disclosure,
- at the beginning of each academic year for activities of a continuing nature (therefore, for continuing activities, the form is only valid through August 7 of each year), and
- any time there is a significant change in an activity which has previously been reported.
What Activities Require Disclosure?

All employees, including those on compensated leave or approved leave of absence (which includes professional development leaves, sabbaticals, annual leave, sick leave, etc.), must submit a disclosure of outside activity on this form if, during employment with the University of West Florida, any of the following will occur:

1. The employee seeks to engage in any compensated activity which is not part of the employee’s assigned duties,
2. The employee seeks to engage in any outside activity, whether compensated or not, which the employee should reasonably conclude
   a. may create or reasonably appears to create a conflict of interest;
   b. may otherwise interfere or reasonably appears to interfere with the full performance of the employee’s professional responsibilities or other institutional obligations; OR,
   c. may create conflict of time, which is defined as an outside activity (including consulting, public service or pro bono work) which interferes with the employee’s primary commitment of time, attention and intellectual energies to the University.
3. The employee is engaged to teach or is otherwise employed at another educational institution.

Activities which are performed wholly during a period in which the employee has no appointment with the University need not be reported, however, employees are encouraged to report activities during such periods.

Please review the non-exhaustive list of types of outside activities which must be reported and for which prior approval in writing is required in the Conflict of Interest Policy (AC-11.02-05/13 at the following link: https://nautical.uwf.edu/UnitApp/Publication/Pub.cfm?PubFormatID=1152).

An employee’s failure to fully and properly report outside activities and other interests, or failure to follow any conditions imposed pursuant to the University’s approval of such activities, may be grounds for disciplinary action, up to and including dismissal.

Please use a separate form for each activity or interest.

1. Employee Name: ________________________________________________

2. Department/Division/Unit: ________________________________

3. Name of Proposed Employer, Contracting Entity, Business, etc., Address and Contact Information: ________________________________

4. Description of Activity and/or Interest including Job Title:
5. For researchers employed on a federal grant (including Principal Investigators, Co-Investigators, Senior Key Personnel, OPS employees, and students), enter source, amount, and type of compensation (e.g., company, client, royalty, honorarium, in-kind compensation, equity or other interest). Also list the previous amount of compensation received from this source during the current contractual period.

6. Anticipated dates of activity: ____________________ to ____________________

7. Estimated number of hours per week, including travel time:

<table>
<thead>
<tr>
<th>Time Devoted to Outside Activity</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
<th>Sunday</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 am to 5 p.m.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 p.m. to 8 a.m.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All day</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total Number of Estimated Hours per week devoted to outside activity: __________

8. This activity will or will not interfere with my University obligations including but not limited to teaching, research, service, advising, office hour obligations or administrative duties or any other duties. If it will, please describe how you will complete your obligations to the University and engage in the outside activity or interest.

9. Will University students or other University employees be involved with this activity?

   Yes       No

   If yes, please state their names and a description of their roles in the activity.

10. Are you required, as a condition of the outside activity/interest, to waive any rights you or the University of West Florida may have to intellectual property, including copyrights, trademarks, patent rights, and/or proprietary information/trade secrets?

    Yes       No. If the answer to this question is yes, the Office of Research and Sponsored Programs must review this form and approve the waiver of rights prior to engaging in the activity.

11. Will University equipment, facilities, services or other resources be used?

    Yes       No. If yes, please complete and submit the Request for Approval of Use of University Resources in Conjunction with Outside Activity form (http://uwf.edu/academic/policies/conflict/Use_of_University_Resources_Form.pdf) with this form.
12. Do you or an immediate family member have an interest in and/or an employment contractual relationship with a business entity that is or might be doing business with the University?

   Yes   No  If yes, please provide the name of the business entity and the name of the family indicating the relationship to you and the business entity.

   NAME OF FAMILY MEMBER          RELATIONSHIP          BUSINESS ENTITY
   ______________________________________  ___________  __________________
   ______________________________________  ___________  __________________
   ______________________________________  ___________  __________________

13. The total number of Outside Activity and Conflict of Interest forms submitted during the period from August 8 to August 7th, including this form is _____. Estimated total number of hours to be spent per week on all outside activities, interests, including this one is _____.

14. I request a conference with my immediate supervisor to discuss this request.

   Yes   No

I have read the University of West Florida Conflict of Interest Policy AC-11.00-11/09. The proposed outside activity or employment reported herein does not and will not interfere with the full performance of my professional duties, institutional responsibilities or any other obligations I may have to the University of West Florida and does not create a conflict of interest.

I certify that I have provided complete and accurate information on this form. I understand that any approval of an outside activity or conflict of interest that is based upon an incomplete or inaccurate report by me is null and void.

Employee Signature ____________________________  Date__________

Typed/Printed Name: ____________________________
Chair/Director/Supervisor Review:
I recommend this request be: _____ Approved _____ Disapproved  Comments:
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
Chair/Director/Supervisor Signature: ______________________ Date_____________
Typed/Printed Name: ________________________________________________

Dean/AVP/Department Head Review:
I recommend this request be: _____ Approved _____ Disapproved  Comments:
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
Dean/AVP/Department Head Signature: ______________________ Date_____________
Typed/Printed Name: ________________________________________________

Office of Sponsored Research Review/Notes:  Date_____________
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________

President/Vice President’s Determination:
_____ Approved _____ Disapproved  Comments:
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
President/Vice President’s Signature: ______________________ Date_____________
Typed/Printed Name: ________________________________________________

Human Resources Review/Notes:
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
Date filed in Human Resources employee personnel file: _________________
NOTE: The Outside Activity/Conflict of Interest form and HR-15.00-2004/07 Employee Code of Ethics policy are both under revision.

For more information, please contact Sharon Jones at sjones@uwf.edu or (850) 474-2611, or Cindy Faria at cfaria@uwf.edu or (850) 474-2602.
**PARKING PERMIT**

*Description and purpose:* The University strives to provide a safe environment for employees, students and visitors and to provide facilities required for personal safety and health. Parking on any of the UWF campuses is a privilege that may be granted and revoked by the University. The University is authorized and reserves the right to regulate its vehicle parking facilities for the exclusive use of designated groups or individuals. All vehicles parked on campus are parked at the risk of the owner. The University does not assume liability for vehicles or items left in the vehicles. Additional copies of this rule may be obtained from Parking Services, Bldg. 91. The text of this rule is on the web page at http://uwf.edu/generalcounsel

All University employees, students and others, with the exclusion of visitors, using automobiles and other mechanical conveyances on campus must be registered with Parking Services the first day the vehicle is on campus. For registration to be considered valid, the permit, if it is a decal, must be properly affixed to the lower left corner of the rear windshield or, if it is a hang tag, must be in the designated place and upright;

Beginning Fall 2014, UWF vehicle registration and permit purchases will be made online only. They will not be sold through the Cashier's Office. Log in to MyUWF to purchase a permit.

New for Fall 2014 semester, Parking and Transportation Services will be responsible for vehicle registration and permit distribution. This can be accomplished online by logging in to MyUWF and typing "Parking Permits" into the search field. Open the "Parking Permits, Citations and Appeals" app and follow the instructions to complete your permit purchase. Visit **Purchasing a Parking Permit** for step-by-step instructions. No convenience fee is charged on permit purchases. You may choose to have your permit mailed or picked up on campus. Semester permits may be purchased at one-half the yearly rate for all permits except Reserved/Administrative. Prices below include Florida State sales tax. Payroll deduction is available for employees. For more information on parking permits and regulations go visit the **Parking Permit webpage**.

Types of permits available:

1. **Decals** must be affixed to the vehicle for which it was registered and are not transferable. Automobiles must affix decal on rear window in lower left corner.
2. **Hang tags** must be hung from the rearview mirror so that they are visible. Placing the hangtag on the dash or console will be considered improper display. Hang tags are transferable to another vehicle owned by the same individual. However, no permit is transferable to another individual.
3. **Motorcycles** must affix decal to the left front fork.
4. **The remote parking permit is a new permit for Fall 2014.** Students, faculty, and staff can choose the remote parking permit option at a reduced price point of $47.50. The remote parking area will be Lot SP2. The trolley will be scheduled to run to and from remote parking to the core campus on a regular basis weekdays until classes are finished in the evenings.
PEOPLE ADMIN 7

Description and purpose: The People Admin 7 (PA&) system houses job descriptions, staff evaluations and posts positions for recruitment/employment.

In order to access PeopleAdmin 7 (PA7), search for the PeopleAdmin 7 (PA7) app in https://my.uwf.edu/ (previously the Employment/Position Management app). If the app was a favorite on your MyUWF desktop, it remains as a favorite with the new title.

The first time you access the PA7 app, click the yellow “Click here to log in with SSO” link and you are automatically logged into the PA7 software. If at any point you need to login the PA7 software outside of MyUWF, go to https://jobs.uwf.edu/hr/login and this will take you to the MyUWF login page. Use your ArgoNet UserName and password to direct you to the PA7 Home tab.

Accessing PPEMS 5.8

PPEMS 5.8 may need to be accessed for historical job descriptions, jobs posted prior to January 15, 2015, and performance evaluations.

PPEMS 5.8 is accessed from the Home tab of PA7. Click the PPEMS 5.8 link under the “My Links” section on the right of the Home tab page. You will continue to use your current MyUWF ArgoNet UserName and password to access PPEMS 5.8. You can also click this link: https://pa135.peopleadmin.com/hr to access PPEMS 5.8.

Although you can access all information on the PPEMS 5.8 site, all new job description actions, supervisor updates, and job postings must be initiated through PA7.

Hiring Officials and Search Committee Members: Continue to use the Guest User Name and password that was provided in the email received from Human Resources to access job postings and applicant materials.

Tutorial

For a tutorial about the program, click the Help tab in the top blue banner. The following information will pop up:

Welcome!
The help was last updated in August 2014.

The capabilities of your site depend on how SelectSuite® is set up for your organization. Because of this, the help may describe features that are not available on your site. In addition, the level of help that you see may not accurately reflect the level of access you have in the system. You may see help for capabilities that are not available to you.
What's New in the Help

The search function in the help now behaves similarly to Google – when you enter a phrase, it searches the entire help system for topics containing text similar to that phrase.

What do you need to do?
1. Set up my defaults for where I start and what role I use
2. Start or work with job postings
   • Review job applications and compare applicants

Solve a problem

Finding information in the help

The help provides several ways of finding information – the table of contents and index can guide you to specific topics, and the search capabilities let you find specific words and phrases.

You can use your browser's bookmark feature to bookmark help topics.

Searching for words and concepts

The search built into the help system behaves similarly to Google – it searches the entire help system for topics containing the term you enter, or terms like it.

For information on searching for items on your site, see Searching and Saving Searches.

Using the index

Your site and the Help sometimes uses different words for specific features and concepts, because many of these can be renamed to match the way your organization talks about them. The index includes cross-references to common terms used for the elements of the HR Suite, and may help you find the information you need. Select the Index tab to switch from the Table of Contents to the index.

Getting Started

This section covers basic information to help you find your way around PeopleAdmin SelectSuite®.

Finding Your Way on the Site
About User Privileges
Accessing Tasks from Your Inbox or Watch List
Changing to a Different Product Area or Permission Group
Searching and Saving Searches
Checking or Changing Your Profile
Requesting a Permission Group Assignment
Setting Your Preferred Permission Group and Area at Login

Posting the Position

This section covers the elements involved in posting the job – the posting itself, search committees, assessment factors associated with the posting, and reference collection.

About Postings
Creating and Editing Postings
Viewing and Printing Postings
About Assessment Factors on Postings
Using Assessment Factors on Postings
Setting up a Search Committee or Guest Account on a Posting
Setting Up Scoring and Review Boards
About Reference Collection
Data Flow in Postings
Formatting Text in Postings and Other Items

Selecting and Hiring the Applicant

This section covers the hiring-related activities that deal with applicants and applications.

Reviewing Applicants
Evaluating Applicants on Assessment Factors
Selecting Applicants
Working with Hiring Proposals

Solving Problems

System users and applicants often need help with these problems.

Logging in

You are unable to log in.

What can cause this: You may have entered your UserName or password incorrectly. After the third try, your account is locked for five minutes.

If the 5-minute lock happens three times in a row, your account is disabled if your next login attempt fails.

What to do: If you are not certain of your UserName and password, or if your account is disabled, contact HR for help.
Access to tasks

You can log in but cannot view or complete any tasks.

What can cause this: You may be set up to log in with the Employee group or another group with similarly limited permissions.

What to do: Change to a different active permission group: Select the appropriate group from the permission group box in the header area of the page, then select the Refresh control. If necessary, open your profile for editing and select the appropriate Preferred Group On Login. See Setting Your Preferred System Role and Area at Login.

You don't see the tab you need

What can cause this:
- You may be in a different area from the tab you need.
- You may be using a permission group that does not have access to the tab.

What to do:
- Change to the product area you need.
- Change to the permission group you need.

The buttons in a dialog box are off the screen

What can cause this: The dialog box contains too many items to display within your browser window.

What to do: Use the down-arrow on your keyboard to scroll down through the dialog box.

The help talks about items that you don't see

What can cause this: The applicant uploaded a file that is password-protected, corrupted, or infected with a virus.

What to do: Contact HR for help.
PERFORMANCE EVALUATION (STAFF)
Superseded By People Admin 7 (PA7)

Description and purpose: The Performance Evaluation process is completed through the Legacy HR Suite, Position, Performance, and Employment Management System (PPEMS).

Performance Evaluations: All access to performance evaluations will continue through PPEMS 5.8 via People Admin 7 (PA7) in MyUWF until further notice.

The University of West Florida is committed to employee development through the utilization of employee evaluation programs to acknowledge performance, to communicate performance effectiveness, to aid in improving performance in assigned duties, and to promote career enhancement. Employees shall be provided with a current position description and a list of goals, objectives, and/or standards at the time of appointment to their position.

The review period for Annual Performance Evaluations is July through June. Objectives for the next year are outlined during the performance appraisal process. Employees and managers will have until September 30 each year to submit evaluations.

UWF has three types of evaluations:

- **Position Orientation**
  All University Work Force employees shall be evaluated at the end of their position orientation year.

- **Annual**
  Employees shall be evaluated annually in July by their immediate supervisor.

- **Special**
  May be initiated whenever the immediate supervisor determines the employee’s performance has changed from the rating level reflected on the most recent evaluation.

In order to complete a Performance Evaluation, employees should visit the **Position, Performance, and Employment Management System (PPEMS)** (online system for completing performance evaluations). If you require assistance in using the system, Human Resources has a **PPEMS User Guide**. Contact LaBratta Epting at 850-474-2292 or Sharon Jones at 850-474-2611.

Additional Performance Evaluation Materials
- **Employee Performance Evaluation Instructions**
- **Objectives Examples**
- **Avoid Biased Ratings**
- **Evaluation Standard Competencies**
- **Performance Management PowerPoint Slides**
PERSONAL IDENTIFIER POLICY
(USE OF SOCIAL SECURITY NUMBERS)

Description and purpose: Below is the policy that explains why UWF ended the use of social security numbers for students, faculty and staff and switched to UWF ID numbers. The change was made in 2009 to strengthen security as identity theft became a common occurrence. UWF forms were changed to reflect UWF ID numbers in place of social security numbers. See policy below.

UNIVERSITY POLICY P-12.00 – 01/08
TO: The University of West Florida Community
FROM: Dr. John C. Cavanaugh, President
SUBJECT: Personal Identifier Policy
Responsible Office/Executive: President’s Office

Instructions

The threat of identity theft has been growing at an unprecedented rate. The University of West Florida [UWF] commits to provide enhanced security for its students, faculty, staff and other persons who do business with or interact with UWF. Accordingly, the University will no longer use the Social Security Number (SSN) as the primary identifier for an individual in any University information system, business form or process, or records collection.

The collection and use of social security numbers by state agencies is restricted in accordance with Florida law. Section 119.071(5), Florida Statutes permits an agency to collect an individual’s social security number where the agency is specifically authorized by law to do so or where collection of the number is imperative for the performance of the agency’s duties and responsibilities as prescribed by law. Therefore, social security numbers will no longer be collected or used at UWF unless the use of the Social Security number is authorized by law or a formal exception meeting the requirements of section 119.071(5) has been approved by the President or his or her designee.

Purpose

The purpose of the Personal Identifier Policy is to:
1. protect the privacy and rights of the UWF community;
2. promote an understanding of the procedures used to ensure the privacy and proper handling of Social Security Numbers [SSN] and other personal information of students, prospective students, faculty, staff, alumni, and other persons officially associated with the University of West Florida;
3. generate confidence and awareness within the UWF community that Social Security Numbers and other personal information are handled in a confidential manner; and establishes the UWF ID as UWF’s approved personal identifier number at UWF.
Beginning in October, 2007, each current member of the UWF community, including employees, students, and alumni, will be assigned a UWF ID number. From that date forward, new students, employees, and others will be assigned a UWF ID at the earliest possible point of contact between the individual and the University. The UWF ID will be used in electronic and paper data systems to identify, track, and provide service to individuals associated with the University. It will be permanently and uniquely associated with the individual to whom it is originally assigned.

Scope

Note: Certain “other persons officially associated with the University” includes alumni, Trustees, donors, Direct Support Organizations, volunteers, temporary employees of agencies who are assigned to work for UWF, and third party contractors engaged by UWF and their agents and employees.

This policy applies to all UWF colleges, departments, administrative units, and affiliated organizations. For the purposes of this policy, affiliated organization refers to any organization associated with the University that uses university resources to create, maintain, or store data to perform its business functions.

Provisions

The following are UWF Personal Identifier Policy provisions:
1. The UWF ID will be considered the property of UWF. Its use and governance shall be at the discretion of the University, within the parameters of the law.
2. Unless the University is required by law to collect a SSN or a formal exception has been approved by the President or designee, individuals will not be required to provide their SSN (exceptions include employment records, financial aid processing, other government transactions, etc.).
3. Existing documents (e.g., completed forms and records) bearing the SSN will not be converted or altered; however, they must be properly secured.
4. Existing templates must be modified to use the UWF ID instead of the SSN.
5. Access to records and record systems containing SSN will be limited to those who have a business-related reason to know this information. Ability to view and/or report the entire SSN in a UWF system will be secured at the individual level by staff role, and approved by the Chief Information Officer (CIO).

Enforcement

Staff, faculty or student-employees who violate this Policy or fail to comply with applicable Personal Identification/SSN Procedures are subject to disciplinary action, up to and including dismissal.

Approved By: Dr. John C. Cavanaugh, President Date: 1/13/08
PERSONNEL ACTION SHEETS

Description and purpose: Personnel Action Sheets are submitted to Human Resources as the culminating form for a staff position search. This is the hiring form that places someone on payroll. It is accessed through MyUWF on Personnel Action Form app.

To start the Action Sheet:

- To create an action sheet for a New Employee click “New Employee”.
- To update a current employee, enter their “UWF ID” and click “Next”.

To complete the Action Sheet:

- Complete the demographic information for the new hire in the upper grey portion of the form, and then complete the New/Revised Appointment information in the blue area based on the search criteria established in the search documents.
- Complete the Purpose of Action and Department Contact information section in the bottom grey section of the form, then click the **CREATE PDF** button.

- Print the PDF file and circulate the form for required signatures. This should include at least the Department Chair and College Dean, and possibly others depending on the funding source for the employment pay.

- Once the required signatures are on the form, submit to the Human Resources office, along with the Essential Hiring Documents available on the Human Resources website: [http://uwf.edu/offices/human-resources/hr-forms-and-resources/employment/](http://uwf.edu/offices/human-resources/hr-forms-and-resources/employment/)
This site also provides access to the various informational and policy pages, which must be read and acknowledged on the Essential Documents Checklist.

**NOTE:** Please contact Carol Gentry, cgentry@uwf.edu or at x2605, or Nicole Lohr, nlohr@uwf.edu or at x2608, in the Human Resources Office, for guidance on completion of the **I-9 form**, Employer Review and Verification section.

**Faculty Action Sheets** are submitted at the Dean’s level for all full-time and adjunct faculty hiring. Once a signed contract letter is received at the culmination of a faculty search or via **Adjunct Appointment Forms** submitted by department before each semester, the Dean’s office personnel submit the form to Human Resources. However, it is the responsibility of the Department to request the Essential Hiring Documents from the new faculty member or any new adjunct instructors and to provide materials for the teaching credentials file for Dean’s office records. Teaching credentials include: curriculum vitae, transcripts, two letters of recommendation, and the SACS accreditation form (see **FACS Database**).

**Addendum to Employment Contract**

Office Administrators may be required to submit a **Personnel Action Sheet** for faculty or other staff who may be hired by a Department on a temporary basis for a lecture or other one-time service. In this case the action form is accessed through the **Personnel Action Form** app and entering the employee’s **UWF ID**. The action sheet form will then include the information for current employment appointment in section 1 of the form. To add employment information for the second appointment, complete Section 2 of the form as the New/Revised Appointment information. Then provide the bottom portion information on Purpose of Action and click for the PDF file. This form will also need to be circulated for signatures, but no other hiring documentation is required.

**Student Action Sheets** are submitted as a separate form from the Personnel form with a slightly different set of Essential Hiring Documents. These are accessed via the **Human Resources Forms** app in MyUWF. Click on **HR Forms and Resources**, then **Student Employment**.

[http://uwf.edu/offices/human-resources/hr-forms-and-resources/student-employment/](http://uwf.edu/offices/human-resources/hr-forms-and-resources/student-employment/)

Instructions for completing the **Student Personnel Action Form** are included on the form link, page 2. Particulars for the position, pay rate, dates of employment, etc., are determined by the hiring department.

Also, see the **Graduate School Handbook** for regulations concerning hiring graduate-level students for GA/TA positions.

The **Student Action** form should be printed and circulated for appropriate signatures and then submitted to Human Resources along with the other **Essential Documents** accessed on the Student Employment page.
# The University of West Florida
## Student Personnel Action Form

<table>
<thead>
<tr>
<th>1. Date Prepared</th>
<th>2. Type of Appointment</th>
<th>3. UWF ID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>□ Graduate Assistant</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Graduate Teaching Assistant</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Graduate Research Assistant</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Student Assistant</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Resident Assistant</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Federal Work Study</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4. Employee Name (Last, First, Middle) (EXACTLY AS PRINTED ON SOCIAL SECURITY CARD)</th>
<th>5. Position No. (HR use)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>6. Title &amp; Pay Grade</th>
<th>Working Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>7. Beginning Date</th>
<th>8. Ending Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>9. FTE (REQUIRED)</th>
<th>10. □ Hourly Rate (based on #)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>□ Salary for Period of Appointment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>11. Home/Time Sheet ORGN (code and name)</th>
<th>12. Pay Index (code and name)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>13. Work Location: Bldg/Room</th>
<th>14. Dept. Contact and Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>15. Action To Be Taken (Select one)</th>
<th>16. School of Attendance for all non-UWF Students (fee payment receipt required)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 17. Further Explanation (as required) |  |
|--------------------------------------|-

<table>
<thead>
<tr>
<th>18. Approval: (Hiring Dept.) Date</th>
<th>19. Approval: (Office of Human Resources) Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>20. Additional Approvals: (as required) Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>21. Approval: (Research and Sponsored Programs - grant funded) Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>22. Approval: (Foundation) Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>23. Approval: (Graduate School) Date</th>
<th>Level</th>
<th># of Credit Hours</th>
<th>□ Last Degree Course</th>
<th>□ Thesis/Dissertation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
POLICE

Description and purpose: The UWF Police (UWFPD) offer fully-fledged policing services dedicated to the Pensacola campus community. They are located in Building 94, off Campus Lane (behind B92, Building Services and B93, Facilities Maintenance), 850-474-2415. Contact information: John Warren, Chief of Police, http://uwf.edu/uwfpolice/

The website provides ample information on the myriad services provided by the office beyond stand patrolling and public safety initiatives. Office Administrators should make sure all new faculty, staff, and students are aware of services offered, including but not limited to:

Campus Safety Escort Program -- Provides student or police protection for pedestrians on campus, (On-campus dial 850-474-2415 and request an escort to escort you to another building or to your residence hall. The escort should present a business card when they make contact with you and also have a photo identification card on their person.). The Police Department has four Student Safety Escorts who assist the Police Department with safety escorts, monitoring the parking lots, and building lock-ups on campus. UWFPD will provide a Police Escort when a Student Escort is not available.

Blue Lights Service -- Call boxes located throughout the campus that provide direct contact with UWF Police (see http://uwf.edu/offices/police/) for a link to a map showing Blue Light locations.

The Mobile Alert System -- Provides Emergency Communications information via text messaging, email, Facebook, Twitter, UWUF 88.1 FM, and the emergency website, http://uwfemergency.org/.

The UWF Police Department also serves as the official repository for Lost and Found items. Found items should be submitted to the Department Offices in building 94. Items not reclaimed are eventually transferred to Central Receiving for public auction.

UWFPD has 21 full-time sworn police officers, two security guards, seven police communications operators, one full-time office manager, and one office program assistant. All of the police officers work at the Pensacola campus and patrol the campus 24 hours a day, 365 days a year. The officers patrol the campus by vehicle, bicycle and foot patrol.

Office Safety

1. Safeguard all valuables. Record serial numbers, brand names and descriptions of valuables which are kept in your office. Small portable items should be kept out of sight. Keep a record of such valuables and a duplicate list in a safe place. This should be done for all your personal property as well as company property.
2. Never leave valuables such as a wallet or purse lying on top of a desk. Place them in a drawer or somewhere out of sight. If you are leaving your office or work area for only a few minutes, lock your desk and secure your valuables.
3. Never carry large sums of money to the office. Safeguard and protect cash and credit cards at all times.
4. If you have a “coffee fund,” “stamp funds,” etc., keep the containers under lock and key. If possible, store the money in a safe.
5. Require identification and authorization from “repairmen” wanting to remove any property, equipment, etc.
6. All outside service personnel should be accompanied at all times when inside your office areas.
7. Establish an effective property control program. Do not loan equipment or office keys without a proper level of authorization and approval. If keys are lost, replace locks immediately, and report the loss of keys to the proper authority immediately.
8. Do not tape important keys under desks, to file cabinets, etc. Ensure proper key control and issuance of all keys to the office. Restrict keys to persons with proper authorization.
9. If you are entrusted with a key to an office area, room, storage facility, etc., make sure the door is locked and all contents are secure when you leave.
10. Avoid letting someone else use your keys unless you go with them, or they have proper authorization for use of the keys. All office areas not in use should be locked.
11. When working late and alone, lock all doors, including your office door. Make sure a phone is nearby. Know the emergency number for the police.
12. Make sure, at the end of the day, that windows are locked and correctly closed; all property is secured and put in protected storage; all desks and files are locked and protected; all doors are closed and locked; and that any alarms or other security measures have been activated.
13. Be alert to unknown strangers wandering through building areas. Report suspicious persons to the police.
14. Make sure there is proper illumination outside all entrances, and all points of concealment are removed.
15. Make sure that there is proper illumination inside your office and internal building areas.
16. If cash is handled in your office area, consider the following:
   a. Protect cash-handling areas at all times.
   b. Consider a silent alarm system in the event of robbery.
   c. If an alarm is installed, ensure proper education in use.
   d. Keep cash amounts to a minimum.
   e. Vary routines in making deposits.
   f. Install a U.L. rated safe, anchored to the floor.
   g. Keep safe locked at all times.
   h. Ensure proper barriers for cash-handling areas.
   i. Make deposits during daylight hours.
   j. In the event of a robbery, take no action which will at any time jeopardize your personal safety or others.
17. Ensure office co-workers, as well as those persons in adjacent parts of the building, share a security-minded philosophy.
18. Try to park as close to building entrances as possible. At night, be sure to park in well-lit locations.
19. Develop a mutual aid system among your co-workers, and other occupants of the building. Assist each other in protecting persons and property.

20. Establish good opening and closing procedures with safety and security in mind.

Safety

The UWF Police Department works closely with the campus community to assure safety. Check the Safety Tips section of their website, or click on any of the following links to learn more about campus safety.

- UWF Police: [http://uwf.edu/offices/police/](http://uwf.edu/offices/police/)
POSTAL SERVICES

Description and purpose: The Campus Mail System is used to provide internal distribution of official mail at the University. Campus or interdepartmental/interoffice mail service is provided by UWF Postal Services to the main University campus once each work day to most locations. The UWF Courier provides service to off-campus locations.

UWF Postal Services operates a U.S. Post Office in the Commons, Building 22, and offers comprehensive services, including but not limited to stamp sales, money orders, express/priority mail, insured mail, package-wrapping assistance, and change-of-address. Post Office Boxes are provided free of charge to students living in university housing. Student mailboxes are located in the post office lobby. Mail collection box locations on campus include: the Post Office, Building 12, Building 50, Village East, Village West, WUWF parking lot, Heritage Hall, Martin Hall, Pace Hall, and Argo Hall.

Hours of Operation
7:45 a.m. - 4:00 p.m.
Monday through Friday
http://uwf.edu/postal/

Package Pick-up also on Saturdays
7:30 - 11:30 a.m.

Campus mail, as well as first-class and express mail, is assigned the highest priority in sorting and delivery. Campus mail is provided free of charge, and all interoffice/interdepartmental mail requires no postage. Mail should be separated clearly by category: mail to be processed and metered by UWF Postal Services, bulk mail, campus mail, resident student mail, mail for UWF currier, and personal-stamped U.S. Postal Services mail. International mail should be separated from the domestic mail. Personal sealed and stamped letters may be placed in Campus Mail for same day postmark and placement into the U.S. Postal Service mail stream.

Any first-class mail requires a postal charge memo that has your department index number, department name, bar code, and authorized signature on it. If you want to send a letter or package certified, return receipt, registered, insured, or delivery/signature confirmation, you can do so using the postal charge memo. Attach a postal charge memo to your letter or package with tape or using a rubber band. Your department will be charged once a month for postage.

Mail is delivered once daily to the mailbox in your building.

Postal Services at postal@uwf.edu or (850) 474-2096 or http://uwf.edu/postal/

Quick Mail Guide at http://uwf.edu/postal/internal/quicklinks.cfm
Appendix C - UWF Postal Charge Memo

A sample UWF Postal Charge Memo is shown below. A master of memos pre-barcoded with your BANNER Index number is available from UWF Postal Services at http://uwf.edu/postal/internal or go to https://my.uwf.edu and search the campus directory. This master can be copied and used with the mail you submit to Postal Services for processing. Non-barcoded memos are available from Postal Services if needed. Refer to Chapter V, Section B for more information.

UWF POSTAL CHARGE MEMO
Separate into Domestic, Foreign and Bulk Mail

INDEX CODE NUMBER: DATE:
INDEX NAME: GENERIC STUDIES
DEPT NAME: GENERICS
AUTHORIZED SIGNATURE
PRINTED NAME

Check Class Desired:
EXPRESS
PRIORITY
FIRST CLASS
STANDARD BULK - NONPROFIT
STANDARD BULK - REGULAR
PACKAGE SERVICES - STANDARD POST
MEDIA MAIL – LIBRARY MAIL
BOUND PRINTED MATTER
INTERNATIONAL: AIR ______ ECONOMY ______

Check Service Desired (Complete required forms):
CERTIFIED ______ RETURN RECEIPT ______
REGISTERED ______ INSURED ______
USPS TRACKING ______ SIGNATURE CONFIRMATION ______

For PS use only - TOTAL: # _______ $ _______

If you run out of postal charge memo’s you can order them from the following link uwf.edu/postal/internal/psmemorequest.cfm. Fill in your department name, location, index, your name, email and hit submit. Postal Services will send you a template of the charge memo and you will be able to make as many copies as you need whenever you need them.

Monthly departmental charges can be viewed @ http://uwf.edu/postal/internal/charges.cfm.

Postal Guide and Mail Guide located @ uwf.edu/postal/internal/publications.cfm.
<table>
<thead>
<tr>
<th>Postal Services Home</th>
<th>Monthly Departmental Postal Charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Us</td>
<td>2013-14</td>
</tr>
<tr>
<td>Mail Guide Quick</td>
<td>2012-13</td>
</tr>
<tr>
<td>Service Links</td>
<td>2011-12</td>
</tr>
<tr>
<td>For Students</td>
<td>2010-11</td>
</tr>
<tr>
<td>Rates</td>
<td>2009-10</td>
</tr>
<tr>
<td>Passport Information</td>
<td>2008-09</td>
</tr>
<tr>
<td>International Mail</td>
<td>2007-08</td>
</tr>
<tr>
<td>Forms</td>
<td>2006-07</td>
</tr>
<tr>
<td>Monthly Charges</td>
<td>2006-06</td>
</tr>
<tr>
<td>References</td>
<td></td>
</tr>
<tr>
<td>Contact Us</td>
<td></td>
</tr>
</tbody>
</table>

Related Pages
- Auxiliary Services
- Business, Finance & Facilities
- Development
PROCUREMENT

*Description and purpose:* The University of West Florida’s (UWF) Procurement & Contracts (P&C) Department manages purchases. It is the office responsible for the acquisition of materials, supplies, equipment and services while ensuring that federal, state, and local government regulations, as well as UWF’s Purchasing Policies and Procedures, are followed.

Please refer to the Procurement website and the “Go Shopping Page” (MyUWF) for further details. These policies and procedures incorporate sound business practices and fair and open competition to maximize the benefit of each UWF dollar spent and to ensure that all applicable regulations are followed.

**Go Shopping**

To access the “Go Shopping Page” go to MYUWF, type in Go Shopping. The “Go Shopping Page” provides information on the following subjects:

- Quick Procurement and Contracts Guide
  - A quick reference to Procurement and Contract policies.
  - Helpful links to approved vendors organized by supplies and services offered.

- A link to the Banner Vendor Search/List Tool
  - An alphabetic listing of all vendors.
  - This includes any individual from inside or outside UWF who receives money and/or is on a TAR.

**Vendor Information for Departments**

- [Vendor Information – Internal Links](#)
- [Internal PCard & Student Vendor Registration](#)
- [Vendor Search By Commodity Code](#)

**PCard**

The PCard (purchasing card) is a University credit card issued to staff for use in most procurement transactions. The PCard can only be used to purchase authorized goods, services, and travel expenses directly for and by UWF. Purchases that still require a PO (Purchase Order) are discussed in the appropriate section of this handbook.

**PCard Training**

PCard holders must complete a training session prior to submitting a request to obtain a card.
Instructions

1. **REGISTER** for the PCard Basic Online eLearning Course. Search for the **Training Reservation Desk** app in MyUWF to access the training calendar.
2. **CLICK** on the **PCard Basic course** title to register.
3. You will be able to take the course the next day.
4. After you have registered for the course - on the following day:
   a. Under the e**Learning** app on MyUWF there is a section titled **My eLearning Courses**
   b. **CLICK** on the course title.
5. **TAKE** and **COMPLETE** the course.

After you have completed the course, you will receive an email congratulating you on your accomplishment and providing you with further instructions.

**PCard Cardholder Application**

The **PCard Cardholder Application** is accessed as an app on MyUWF. The application requires that you indicate your Account Manager, Business Manager, and Reconciler, as well as the fund index for your Department. The application is processed through the RouteIt system.

Instructions

1. **SEARCH** MyUWF for “PCard Cardholder Application.”
2. **CLICK** on “PCard Cardholder Request.”
3. Use the radio button to **INDICATE** whether you are submitting for yourself or for someone else.
   a. If submitting for someone else, enter their ArgoNet UserName.
4. **ENTER** applicant information including ArgoNet UserName for the Account Manager, Business Manager, and Reconciler. (Account Manager or Business Manager may also serve as Reconciler.)
5. **ENTER** the default index. (This is the account number to which charges will be applied if they are not approved before the AutoPost date.)
6. **ENTER** the cycle spending limit.
7. **ENTER** the ArgoNet UserName of your Dean/Director/Chair/VP/President for approval of the Route.
8. **ENTER** comments, if desired.
9. **READ** the Cardholder Agreement and **CLICK** the check box.
10. **CLICK** the “Next” button to proceed to the next step.
11. **CLICK** the “View Document” link to view the final request and print, if desired.
12. **ENTER** comments to the approvers, if desired.
13. **CHOOSE** an action as follows:
   a. “Start Routing” submits your request and sends it to the first person in the approval queue.
   b. “Delete Request” completely deletes the request.
   c. “Detour Request” allows you to send the request to someone else before it is submitted.
d. “Save and Return to Route List” saves the unfinished form so you can return to it later. The request can then be found on the RouteIT home page under “Routes I initiated.”

14. Once the Route has been approved, you will receive an email notification with further instructions.

The rules and regulations governing purchasing with PCards and the requirements for reconciliation and recordkeeping are complex and meticulous. The PCard Reference Guide is a necessary source of information and is available on the Procurement website.

PCard Reference Guide:
http://uwf.edu/PCTraining/PCardGuides/PCardReferenceGuide.cfm

Also, please refer to the Summary of Changes to the PCard Reference Guide:

Temporary Increase/Temporary Override Request

There are dollar limits to PCard charges. The normal permanent limit for a single transaction is $999.00. There is also a cycle limit (total dollar amount charged on one card within a given month). This amount varies across offices, based on spending history within the given department. Any purchase which will exceed either of these limits must have prior approval via the Temporary Increase requests submitted via the Temporary Override Request app on MyUWF and processed through RouteIt.

Instructions

1. In MyUWF, SEARCH PCard Override Request.
2. CLICK on “Temporary Override Request or PCard Special Limit Increase” to open a RouteIt form.
   a. Note: In RouteIt, for step-by-step form-specific assistance, RIGHT-CLICK on “help: at the top and select “Open link in new tab.”

3. SELECT the radio button for either requesting for yourself or for someone else.
   a. If submitting for someone else, enter their ArgoNet UserName or UWF ID number.
4. In the second section, **SELECT** the radio button for either a Special Limit Increase (permanent increase to your single transaction limit) or a Temporary Override Request (for a temporary increase to your PCard limit).
5. CLICK “Next.”
6. FILL IN amounts for either single-limit increase or monthly-limit increase, or check the MCC Request radio button. Single-limit increase should be the exact amount of the item(s) you are purchasing.
7. ENTER effective date and expiration date. Depending on what you are purchasing, your expiration date might be a few weeks or several months out from the effective date.
8. ENTER a description of what is to be purchased.
9. ENTER the amount of the purchase.
10. ENTER the vendor name.
11. ENTER your supervisor’s ArgoNet User Name.
12. READ the terms and CHECK the box that you agree.
13. CLICK “Next.”
14. CLICK “Start Routing.”
15. You will receive an automatic email once the Route has been approved.

All PCard charges must be approved by a designated Account Manager (with a Business Manager serving as back up approver, when needed).

PCard Reconciliation

All transaction documentation must be retained and reconciled on a monthly basis with UWF ledger reports (PCard Reconciliation PRO000007 in Information Navigator) and JP Morgan bank statements. Your Account Manager (or Reconciler) is the custodian of your original documentation, so always retain copies prior to handing off to your Account Manager.

Instructions
(For this demo, we’ll assume you are running a report for the month of July.)

Banner Reconciliation Report
1. In MyUWF, Information Navigator, SELECT “PCard Reconciliation.”
2. In the “Month” section, SELECT July.
3. Current year should be pre-populated.
4. CLICK the down arrow in the Card Holder section and FIND your name. (Hint: you can type the first few letters of your last name.)
5. CLICK “View Report.”
6. PRINT the report with the paper in landscape orientation.

JPMorgan Chase Report
1. If you have not already done so, CALL the number on the back of your card to get a temporary password. If you’ve already received your password and successfully logged in, skip to the next section.
2. When you call, you will first ENTER your card number.
3. The next number will be the last four large digits of your UWF ID on your Nautilus card.
4. SELECT the option to speak with a customer service representative.
5. Representative will ask for a second 4-digit code, this will be the index number associated with your PCard.
You will be asked to **CONFIRM** your UserName and your email address.

Representative will email a temporary password to your UWF email address.

**NAVIGATE** to the site, log in, and enter authentication answers.

Now, you can run your report.

1. If not already there, **LOG IN** to the JP Morgan Chase website:
   a. [https://smartdata.jpmorgan.com/sdportal/home.view?cobrandHost=chase&request.trail.to ken.key=5860bb1f6dd03d1e3bd50628d4fe9276](https://smartdata.jpmorgan.com/sdportal/home.view?cobrandHost=chase&request.trail.to ken.key=5860bb1f6dd03d1e3bd50628d4fe9276)

2. **CLICK** “Account Activity” in the upper left.

3. **CHOOSE** “Schedule Report”

4. **CHOOSE** “Account Statement (Version 2)”

5. **Date Type** = Posting Date

6. **Delivery Options** = System Inbox

7. **Report Format** = Adobe PDF

8. **Number Format** = xx,xxx.xx

9. **Date format** = mm/dd/yyyy

10. **Description** – leave blank

11. **Notify me at** = will be pre-populated with your email address

12. **CLICK** Next

13. **CHOOSE** “Run Once” (You can also schedule the report to run every month. You will receive an email message on the first day of each month telling you the report is ready.)

14. Dates --- if running the report on August 1\(^{st}\) for the July report, **ENTER** June 15 for the start date and July 14 for the end date. This will make the report match up with your Banner report.

15. Once the dates are entered, **CLICK** “Save”.

16. Within a minute or so, the report will show up in your “Scheduled Reports” list, and once it is finished processing, it will move to your “Completed Reports” list. Be patient --- this takes a few minutes.

17. Once the report is in your “Completed Reports” list, you can **CLICK** on it and **DOWNLOAD** it to print.

18. If the total amount on your report does not match your Banner PCard Reconciliation report, try adjusting the dates. This part takes patience, as you have to schedule the report and let it complete before you can download and view it.

19. To delete old instances of the report, click on the box to the left of the report in the completed list, then click "Delete" at the lower right of the list.

To complete the reconciliation, ensure that you have documentation for every item listed on the Banner report and that there are no charges listed on the JPMorgan Chase report that are not also on the Banner report.

Keep a copy of both reports and give the originals to your Account Manager or Reconciler.
**Purchase Requisitions**

Any purchasing transaction that requires a Purchase Order must be obtained through the **Banner Purchase Requisition** system. Purchase Orders are necessary under three conditions:

1. Vendor does not accept credit cards;
2. The purchase is OCO (see definition of OCO under Definitions) - OCO items are not allowed on PCard;
3. Direct Pay Request cannot be used – **Note:** Financial Services is permitted to make direct payments for certain expenditures (see Direct Pay Guidelines) not to exceed $1,000 via “Direct Pay Request”

Requisitions are submitted in Banner Production via the **Requisition** form (FPAREQN). Specific training sessions provided by the Procurement and Contracts Office are required before access to this system is authorized.

**Instructions**

Banner Requisition Online Training - Sign up for training using MyUWF. Click on "Employee Resources" folder.

1. Scroll down and click on "Training Reservation Desk".
2. Scroll down to "Banner Requisition Training: sign up today, take the Online eLearning course tomorrow".
3. Click on "Class Info".
4. Click on button "Click to Sign Up for class".

Note that the requisition system is complex. Use of the requisition form requires knowledge and understanding of the UWF fund numbering system (Index, Fund, Organization, Program); vendor listings, commodity coding, and budget reporting.

1. The beginning of the purchasing process is to enter (key in) a Banner Requisition. Banner is the system in which Requisitions are entered. In order to enter Requisitions in Banner, you must satisfactorily complete online training and then gain access to the applicable Banner Fund and Orgn (Organization) Codes.
2. After all the required data is entered in the Banner Requisition, it is completed and moves through the Approval Process. The Approval Process takes place after you have clicked the "Complete" icon in the Requisition.
3. After the Approval Process is complete, the Requisition moves to Procurement, where it will be assigned to a specific Buyer.
4. After evaluating the Requisition and assuring all backup has been received, the Buyer will assign the Requisition a Purchase Order (PO) number and process the PO in Banner. Upon completion of the PO by the Buyer, an automated email will be sent to the Requisitioner with an attached hard copy (PDF format) of the PO.

Go to **VENDOR REGISTRATION** for more information.
PROGRAM REVIEW

Description and purpose: The Florida Board of Governors requires the cyclic review of all academic degree programs in State universities at least every seven years. Program reviews must document how individual academic programs are achieving stated student learning and program objectives within the context of the University’s mission, as illustrated in the academic learning compacts. Academic program reviews are designed to periodically analyze how degree programs provide students with high quality education and preparation for success in our global economy.

Procedures for a Program Review are extensive. Do not hesitate to ask for assistance or clarification from other Office Administrators that has been through the process. Ask another Office Administrator to look at the final copy of their last Program Review so you can get an idea of what the report will actually look like when completed.

There are policy and procedures, templates, forms, and a timeline to follow. The Office Administrator will assist the Chair of the department with planning and gathering information for the Program Review.

Instructions

1. Academic Program Review website: http://uwf.edu/offices/academic-affairs-division/resources/program-review/

   The website contains:
   - Policy and Procedures
   - Timelines
   - Templates
   - Forms

2. Contact Office of Academic Affairs, Judy Jones at jjones@uwf.edu, to assist with any questions.
PROPERTY

Description and purpose: The Property office is part of the Office of Financial Services. Access the Property web page via the Financial Services website found in the Campus Directory for Departments, or use the following link:

Property web page:  http://uwf.edu/offices/financial-services/departmental-areas/property/
Property Forms: http://uwf.edu/offices/financial-services/forms/property/

Contact: Regina Bell, at rbell@uwf.edu or ext. 3113

The site includes a link to the Property Manual, which is recommended reading before making any requests regarding University property.

The Property office is charged with auditing the location and responsible departments of all University items of capitalized property. As these items are purchased, they are tagged with identification numbers and placed in the inventory system. The location of all capitalized property is verified once each year. Access to the property inventory is available in Information Navigator under the Report FIN00004 Property Search Page. Please note that the definition of capitalized property changed in 2011 and no longer includes property purchased for under $5,000. It is now the responsibility of individual departments to keep internal inventories of those items now deemed Attractive Assets (see manual).

Any change to the property inventory will involve submission of the appropriate form to the Property office. These forms are located on the Property web page or in MyUWF (search term: Property).
UNIVERSITY OF WEST FLORIDA
EQUIPMENT CHECK-OUT FORM
FOR PERIODS IN EXCESS OF TEN DAYS

I request permission to remove UWF equipment from University premises for official use at off-campus locations. This form must be completed, signed, and forwarded to the Property Section in the Controller's Office prior to removing any equipment from the University premises.

<table>
<thead>
<tr>
<th>UWF Tag #</th>
<th>Department #</th>
<th>Description</th>
<th>Serial #</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Period of Use</th>
<th>From:</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Purpose:**

Typed Name of Requestor

Department Name and Number

I hereby accept full responsibility for the above described equipment and agree to reimburse UWF for any damage or loss resulting from my negligence. I also agree to bring this equipment back to campus for inventory purposes when requested to do so by the Property Section.

Signature of Requestor

Date

**Approved:**

Signature, Department Head/Accountable Officer

Date

If approval is requested in excess of 90 days, this form must also be signed by a Dean or Vice President.

Signature, Dean or Vice President

Date

I hereby certify that the above described equipment has been returned to the University premises and was returned in satisfactory condition. (Return 2nd Copy to Property)

Signature, Department Head/Accountable Officer

Date

**Distribution:**

Original - Property Section, B#20E, Rm 108
1st Copy - Department
2nd Copy - Property When Equipment Returned
3rd Copy - Given to Requestor
UNIVERSITY OF WEST FLORIDA
PROPERTY TRANSFER FORM

<table>
<thead>
<tr>
<th>To: Property Section, Building 20E, Room 108</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>From:</td>
<td>Dept. Name &amp; No.</td>
</tr>
</tbody>
</table>

Please move and **have department** or authorized representative **acknowledge receipt** when move is completed, and return this document to the Property Section in the Controller's Office.

<table>
<thead>
<tr>
<th>Special Instructions:</th>
<th>FROM</th>
<th>TO</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Dept. Name</td>
<td>Dept. Name</td>
</tr>
<tr>
<td></td>
<td>Dept. No.</td>
<td>Dept. No.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UWF Tag#</th>
<th>Serial #</th>
<th>Property Description</th>
<th>Bldg. No.</th>
<th>Room No.</th>
<th>Bldg. No.</th>
<th>Room No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>12345</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Transferring Department:**
I hereby authorize the above transfer for the property listed on this form.

**Receiving Department:**
I hereby acknowledge and accept accountability for the property on this form.

<table>
<thead>
<tr>
<th>Signature, Accountable Officer/Project Director</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Signature, Accountable Officer/Project Director</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**DISTRIBUTION:**
Return original and all copies to the Property Section, Building 20E, Room 108.
The Property Section will return the completed copies to:
1. Transferring Department
2. Receiving Department
## UNIVERSITY OF WEST FLORIDA
### MISSING/STOLEN PROPERTY REPORT

**Department Name:**

**Department Number:**

<table>
<thead>
<tr>
<th>Missing/Unable to locate During Inventory</th>
<th>FY</th>
<th>Stolen (Police Report Attached)</th>
<th>FY</th>
</tr>
</thead>
</table>

### One Item Per Report

<table>
<thead>
<tr>
<th>UWF Tag #</th>
<th>Description</th>
<th>Serial #</th>
<th>Cost</th>
<th>Date Acquired</th>
</tr>
</thead>
</table>

The following questions must be completed by the Accountable Officer/Project Director.

1. **Last Observed:**
   - **Date:**
   - **Location:**

2. **Brief description of the reason why the item cannot be located:**

   - [ ] Missing from a Department Move
   - [ ] Cannibalized
   - [ ] Stolen

**Other Reason:**

3. **What action was taken to locate the missing/stolen property?**

4. **Brief description of any procedural changes implemented to prevent future losses.**

**Signature, Accountable Officer/Project Director**

**Date**

**Signature, Dean or Division Head**

**Date**

**Signature, Vice President**

**Date**

*Divisional Vice President approval required on all items $2,000 or over.*

### Controller’s Office Use

<table>
<thead>
<tr>
<th>Date of Last Inventory</th>
<th>Subsequent Inventory Dates</th>
</tr>
</thead>
</table>

### Distribution:

- Original and 1st copy -- *Property Section in the Controller’s Office, Building 20E, Room 108*
- 2nd copy -- *Department*


RECORDS MANAGEMENT

Description and purpose: Florida’s records management program promotes the efficient, effective, and economical management of public records. Proper records management ensures that information is available when and where it is needed, in an organized and efficient manner, and in an appropriate environment. UWF Records Management contact is Gus Harris, ext. 2693 or gharris@uwf.edu.

Records management is more than retention, storage, and disposition of records; it entails all recordkeeping requirements and practices that allow an organization to establish and maintain control over information flow and administrative operations. Florida's records management program is authorized by section 257.36, Florida Statutes and applies to records of public agencies as defined in 119.011(12), F.S.

Records management is the management of records throughout their life cycle, from their creation through active use, inactive storage, and final disposition. Among the many benefits of records management are:
- Space savings
- Reduced expenses for filing equipment
- Increased efficiency of information retrieval
- Compliance with records retention requirements
- Identification and protection of vital records
- Control over creation of new records
- Identification of historical records

The Records Center

The UWF Records Center provides space for storing inactive university records. The center has a storage capacity of 6,522 cubic feet. Storage supplies and pickup services are provided by center staff.

Records Retention & Disposition

State laws and rules require that records be retained for specified time periods. These laws and rules also include requirements for proper records disposition. The Records Management Department provides the necessary retention/disposition procedures and information that enables university departments to comply with these requirements.
Information

Information and procedures for carrying out records management activities are provided on the Records Management website. New employees, or those unfamiliar with UWF Records Management, are encouraged to view the “Records Management Overview” presented herein as a PowerPoint presentation. The presentation explains records management concepts, as well as the function and services of the UWF Records Management Department.

Consultation/Training

The UWF RMLO provides consultation services regarding all areas of records management, including retention, disposition, imaging, filing systems, document creation, etc. Please complete the request and you will be contacted to set up a meeting time.

Instructions For Completing Records Disposition Report

After records have been maintained in the department for the State mandated time, use this form for records destruction.

NOTE: Complete sections 1-6 on the form per the following instructions.

- **DIVISION** - Enter the division of the university that your department or office is within i.e.
- **ACADEMIC AFFAIRS, ADMINISTRATIVE AFFAIRS, STUDENT AFFAIRS, UNIVERSITY ADVANCEMENT, DEPARTMENT** - Enter your department name.
- **CONTACT** - Enter the name, extension, and email address of the department person who is immediately responsible for the maintenance and security of records. This is the person to whom inquiries regarding the disposition request will be directed.
- **SUBMITTED BY** - This section must be signed and dated by the department head. Print that person's name and title in the space below their signature and date.
- **NOTICE OF INTENTION** - Enter an "X" (auto-check online) by the disposition requested. This almost always will be "Destruction" *(Note: records that are approved for destruction are deposited by Records Management staff in a paper bin and transported to a recycling vendor). Any other disposition should be discussed with the University Records Management Liaison Officer (RMLO) prior to completing the form and they will instruct you on what to enter in such case.
- **LIST OF RECORD SERIES** - Complete the following information for each record series listed. You will need to refer to the records schedule in the back of the University Records Management Manual for a, b and c below.
  - Schedule No. - Enter the appropriate records schedule number. This will be either GS1 or GS5. This information appears at the end of each records series in the records schedule.
  - Item No. - Enter the appropriate number and letter (a or b) of the record series. The item number is shown beside the schedule number for each listing in the records schedule. The letter, "a" or "b" indicates "record copy" or "duplicate" and
appears by the retention for each. Enter the Item number in this way i.e. 3(a), with the letter in parenthesis.

○ Title - Enter the title of the record series as listed in the records schedule.

○ Ret. - leave this space blank. This space will be completed by the UWF RMLO.

○ Inclusive Dates - Enter the dates covered by the records (the period they are "inclusive in"). Use the same period designation (fiscal year, calendar year, etc.) referred to in the retention, or if the retention does not indicate a particular designation then use whatever is appropriate to the way you maintain the records (calendar year, fiscal year, etc.). You may list more than one period (year, fiscal year, semester, etc.). However, you need only list the beginning and ending dates, i.e. 7/92-6/94 (this example indicates the records are inclusive within the 2 fiscal years 92/93 and 93/94).

○ Volume in Cubic Feet - Enter the approximate number of cubic feet. The conversion chart (page A-8) in the UWF Records Management Manual will be helpful if you are unsure of this amount.

○ Disposition Action and Date - Leave this blank. The UWF RMLO will use this space to document the disposition action and date.

The following is a sample of an actual records disposition of student records for the period from July 2004 to June 2006 and employment application records for the period from July 2005 to June 2006:
THE UNIVERSITY OF WEST FLORIDA
RECORDS DISPOSITION REPORT

1. DIVISION
CAS

2. DEPARTMENT
Government

3. CONTACT
Shelby Freeman
Ext 2397 Email: sfreeman@uwf.edu

4. SUBMITTED BY: I hereby certify that the records to be disposed of are correctly represented below, that any audit requirements have been fully justified, and that further retention is not required for any litigation pending or impending.

Department Head Signature: Alford Cusson, Chair
Department Head Name and Title: (Printed)

5. NOTICE OF INTENTION
The scheduled records listed in item 6 and to be disposed of in the manner checked below (specify only one).

- [ ] Destruction
- [X] Scanning and Destruction
- [ ] Other

6. LIST OF RECORD SERIES

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>GS5</td>
<td>89a</td>
<td>Student Education: Supporting Documents</td>
<td>6/30/04-6/30/06</td>
<td>7/2004-6/2006</td>
<td>634.34</td>
<td>Shredded</td>
<td>5/21/13</td>
</tr>
</tbody>
</table>

7. RMLO REVIEW: I have reviewed this disposal report and any deletions or modifications are noted.

[Signature] [Date]

8. ARCHIVIST REVIEW: I have reviewed this disposal report and any records transferred to the UWF Archives are noted.

[Signature] [Date]

9. DISPOSAL AUTHORIZATION: Disposal for the above listed records is authorized.

[Signature] [Date]

10. DISPOSAL CERTIFICATE: The above listed records have been disposed of in the manner and on the date as shown in column h.

[Signature] [Date]

Witness:

[Signature] [Date]
Records Storage Transmittal Instructions

Use this form in order to store records in the warehouse.

- **PAGE** – Enter the page number.
- **DATE** - Enter the current date.
- **FROM** - Signature of individual storing records. Also, enter department name, building/room number and telephone extension.
- **SHELF NO.** - Leave blank. These numbers (shelf locations) will be assigned by records center staff.
- **FOR EACH BOX:**
  - **BOX NO.** - Enter the box number (carton number from label).
  - **RECORD SERIES TITLE** - Enter the record series title as shown on the records schedule. If you want to further describe the record series use additional lines underneath the title.
  - **INCL. DATES** – Enter the inclusive dates for the records in the box.
  - **SCHEDULE/ITEM NO.** - Enter the schedule and item number from the records schedule. The schedule number will either be GS1-S or GS5. The item number is listed adjacent to the record series title in the records schedule.
- The items at the bottom of the page are completed by records center staff.
- Send the completed transmittal form to UWF Records Management, building 48. Records will be picked up and transported to the storage facility by Records Management staff upon receipt and review of the transmittal. A copy of the transmittal form will be returned to the department once records are stored.
**RECORDS STORAGE TRANSMITTAL**

Date: 11/07/13

From:

<table>
<thead>
<tr>
<th>Department Contact (Signature)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government</td>
</tr>
<tr>
<td>Department Name</td>
</tr>
<tr>
<td>Building/Room</td>
</tr>
<tr>
<td>Extension</td>
</tr>
</tbody>
</table>

The records listed below should be stored in Records Storage Facility until their respective dates for destruction in accordance with their Retention Schedule as indicated.

<table>
<thead>
<tr>
<th>Shelf No.</th>
<th>Box No.</th>
<th>Record Series Title</th>
<th>Inclusive Dates</th>
<th>Schedule/Item No.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Date Stored: 

Stored By: 

Accession No: 
Inspection and Receipt Form Instructions

This form is for requesting access to records in the warehouse.

- **ACTIONS** – check the appropriate box
  - INSPECTION ONLY – indicates that you will be inspecting records at the storage facility.
  - RETURN TO DEPARTMENT – indicates you request that records be returned to your department.
  - RECORDS INFORMATION
    - RECORDS DESCRIPTION - Enter the description as it appears on storage transmittal form. Enter additional descriptive information when only certain documents or files within a box are being accessed.
    - ACCESSION NO. - Enter the accession number from the storage transmittal form.
    - BOX NO. - Enter the box number as indicated on storage transmittal form.
    - SHELF NO. - Enter the shelf number as listed on the storage transmittal form.

- **AUTHORIZATION**
  - DEPARTMENT - Enter requesting department name.
  - AUTHORIZED BY - **Signature** of department representative who is authorizing the access of the records i.e. supervisory personnel, office manager, director, etc.
  - DATE – date of request/signature.
  - The remainder of the information will be completed when the records are accessed/delivered, and (if applicable) when records are returned to the center.
Sample UWF Records Management Inspection and Receipt Form

UWF RECORDS MANAGEMENT INSPECTION AND RECEIPT FORM

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ INSPECTION ONLY</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>RECORDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECORDS DESCRIPTION</td>
</tr>
<tr>
<td>----------------------</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AUTHORIZATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEPARTMENT</td>
</tr>
<tr>
<td>RELEASED BY</td>
</tr>
<tr>
<td>RETURNED TO STORAGE BY</td>
</tr>
</tbody>
</table>
REGISTRATION

Description and purpose: As of fall 2014 semester, faculty and staff are unable to register students for courses. The students must register for themselves or go to the Registrar for assistance. If a student inquires as to how to register, refer the student to the Registration Webpage at: http://uwf.edu/go/registration/ for step-by-step instructions and videos. For any questions, students should contact their advisor.
REPORT NAVIGATOR

*Description and purpose:* Report Navigator is the first of many online reporting programs utilized at UWF (also see the sections on Information Navigator for Banner Reporting, Tableau for Student Banner reports, and SQL for Advancement Services/Foundation reports). Report Navigator is designed to provide online access to reporting from various offices on campus and is accessed through MyUWF.

Any office providing basic data for reporting are referred to as Report Sponsors, and you must contact these separate offices for authorization to access their reports. For instance, much of the student records reporting from the Registrar’s office and Student Academic Support Services (SASS) were disseminated through this site. CICS account authorization is required for these. With the onset of the Student Banner system, most of these reports will no longer be in use.

However, several offices on campus still make use of this system, such as the Cashier’s office, UWF Foundation, and Admissions.

**Report Navigator Profile**

The Report Navigator Profile is a listing of most frequently accessed reports. (See the example below, which illustrates the reports regularly accessed in the College of Business Dean’s Office).

![Report Navigator Profile](image)

**Instructions**

1. To add reports:
   a. An active CICS account is required for Report Navigator use. If you do not already have CICS access, **CONTACT ITS.**
   b. In MyUWF, **SEARCH** “Report Navigator.”
   c. **CLICK** on “Create/Update User Profile.”
d. **FIND** the reports or departments you wish to add to your profile from the list *below* the blue section.

e. **CLICK** on the check-box to the left of each report name.

f. **CLICK** “Submit” when finished.

g. The reports most often accessed now will be visible when you open Report Navigator.

2. To delete reports from your profile:
   a. In MyUWF, **SEARCH** “Report Navigator.”
   b. **CLICK** on “Create/Update User Profile.”
   c. In the blue section, **CLICK** on the check-box to the left of each report you no longer need.
   d. **CLICK** “Submit.”
   e. The reports will no longer be listed on your profile. If you need them at a later date, just add them.

**Report Navigator Reports**

Various reports are uploaded to Report Navigator on a monthly basis. To access the reports, you can either have them sent to your email, or you can view and print directly from Report Navigator.

**Instructions**


2. **CLICK** on the report you wish to access.
   a. You will see a description of the report, followed by a listing of the most recent instances of the report.

3. In the “Action” column, **CLICK** “view” or “email” for the report you wish to see.
   a. **CLICK** on “View” to open a PDF version of the report.
   b. **CLICK** on “email” to open a dialog box for recipient information. After filling in the appropriate information, **CLICK** “Submit” and you will receive confirmation that an email has been sent with the report as an attachment.

More information about Report Navigator can be found by clicking “Help” at the top of the main menu.

https://nautical.uwf.edu/portalMenuModules/general/allServices.cfm?fuseaction=ReportNavigator_Help&reportId=0

If you have any other specific questions about the system, contact the ITS HelpDesk at 2075 (helpdesk@uwf.edu) or contact the specific office sponsoring the needed.
ROUTEIT

Description and purpose: RouteIt is a UWF system for electronically sending documents to one or more people for action. As individuals receive and review a document, their name is recorded, providing an online record of their electronic signature. At any point along the route, a document can be approved or denied.

Instructions for each RouteIt process are contained in the pertinent sections of this manual.

a. Foundation Funds Request
   https://nautical.uwf.edu/workflow/workflows/foundationfunds/
b. Key Request
c. https://nautical.uwf.edu/workflow/workflows/keyrequest/
d. Banner Security
   https://nautical.uwf.edu/workflow/workflows/bnrsecStudent/index.cfm
e. PCard Temporary Override
   https://nautical.uwf.edu/workflow/workflows/PCardSpecial/index.cfm
f. PCard Limit Increase
   https://nautical.uwf.edu/workflow/workflows/PCardSpecial/index.cfm
g. Property Survey Request
   https://nautical.uwf.edu/workflow/workflows/propertySurvey/index.cfm

INITIATE a RouteIt Process
Depending on the task to be completed, SEARCH MyUWF for the appropriate RouteIt form. Instructions for some of the most commonly used forms are linked below.

a. Foundation Funds Request <link>
b. Key Request <link>
c. Banner Security <link>
d. PCard Temporary Override <link>
e. PCard Limit Increase <link>
f. Property Survey Request <link>

Instructions
Within any of the process forms mentioned above, the final submission screen will provide a box for optional Comments (to provide file reference information or to provide additional information for those authorizing the request) and a selection of buttons to either:

a. Finish (begin routing the document),
b. Delete (to cancel the request),
c. Detour (to include another person for authorization not normally part of the routing process), or
d. Save and Return (to allow you to add other information or begin routing at a later point).
CLICK the “Finish” button to Initiate the route. From there, the main page of the RoutelIt app appears. (This is also accessed directly in MyUWF.)

This main menu provides a list of all RoutelIt applications initiated by you in the last ten days. (If you wish to see older processes you may request different time frames at the bottom of the screen.) This list provides you with access to PDF documents as file copies for the requests. And, in some instances, as with the Foundation Funds Request, there are also links for uploading supporting documentation. You can also view information on the progress of each request as it proceeds through the routing process.

APPROVE a RoutelIt Process
Anyone who is designated to provide electronic signatures approving a particular request will receive an email notification when a route requires action. Simply click on the link contained within the email to open the RoutelIt system. The RoutelIt main page then lists all requests requiring action.

Instructions
- Each route has a View Document link. CLICK this link to see information about the specific item. When finished reviewing the document, CLOSE the window to return to RoutelIt.
- Depending on the type of route you are looking at, you may have several sections of information to enter or just one. ENTER required information to complete the task.
- If you wish, you can enter Comments. By default, your comments travel with the route. Everyone in the route, including the initiator, can view your comments. However, you can make your comments private for your own personal reference by checking the box at the bottom of the comments section.
- CLICK a button to complete the task. Your options depend on the process you are working with. Below are the most common options.
  - Deny: Denies the request. The reason for the denial must be entered in the comments box. This reason will appear in the email generated by RoutelIt and sent to the initiator/requestor.
  - Approve: Allows the route to proceed to the next person in the route with your approval.
  - Detour Request: Sends the item to someone else who is not normally in the process.
  - Save and return to Route List: Saves any information you entered and returns the route to your list of routes requiring action.

RoutelIt Video Demonstration (What is a RoutelIt)

For complete information see the RoutelIt description and instructions on the ITS website at:

http://uwf.edu/offices/help-desk/administrative-services/route-it/
SCANTRONs

Description and purpose: Scantron forms are used for large classes during testing (multiple choice). After the exam the forms are scanned on a machine set up in the Library.

The Scantron scoring machine, Grade Master 600, is located at the John C. Pace Library on the second floor in the microfilm area. Instructions can be found in the User Manual from the following link: http://grademaster.wikispaces.com/file/view/Grademaster+Manual.pdf

Many styles of compatible answer sheets can be purchased from Apperson using the following link: https://ssl1.appersonsecure.com/cgi/DisplayCatalog.cgi?CatName=gm. A Departmental PCard may be used for payment.

The Scantron machine is available during regular library hours.

See next page for Scantron sample.
SCHOLARSHIPS

Description and purpose: A scholarship is "non-repayable" aid and is awarded on the basis of academic achievement, athletic skills, special talents, and sometimes demonstrated financial need. UWF offers a wide range of scholarships that are awarded to new and continuing students.

Financial Aid Office Scholarships: The UWF Financial Aid Office awards a limited number of need/merit scholarships. The Free Application for Federal Student Aid (FAFSA) is required. In order to be considered you must have and maintain a minimum 3.00 GPA unless otherwise noted. Some scholarships are renewable; however, the majority are one-time awards.

Please review the list of Foundation Scholarships awarded by the Financial Aid Office.

Office of Undergraduate Admissions Scholarships: Admitted students are automatically considered for scholarship awards using the material provided in the application for admissions to evaluate academic merit. Some scholarships will also require the SUBMISSION of the FAFSA to be eligible. The vast majority of scholarships are awarded to students entering during the fall semester; however, scholarships are available for spring term entrants on a limited basis. Some scholarships are renewable and others are one-time awards. Learn more at Admissions Awards and Aid.

Scholarship Consideration: To be considered for any award, first-year students should be admitted prior to December 1. For those scholarships that consider financial need, please SUBMIT your FAFSA by March 1.

Renewal Criteria: Generally a 3.0 cumulative UWF GPA is required for renewal. If there is a higher minimum standard and/or credit hour requirement, it will be included in the award notification. Renewable UWF scholarships require continuous, full-time enrollment (excluding summer) at UWF. Students must remain in good academic standing. Once lost due to academics, a scholarship will not be reinstated if GPA improves.

Academic Scholarships: Some academic departments award merit-based funds. These scholarships are awarded directly by the department. Contact the Dean’s Office in your College for additional information and application procedures. Graduate students may also CONTACT the Graduate School for information on scholarships.

Athletic Scholarships: are awarded by the Head Coach of each individual sport. For a list of Head Coaches and contact information VISIT: http://www.goargos.com/staff.aspx

UWF Foundation Scholarships are available in the following categories.

Archaeology & Public History Scholarships
Athletic Scholarships
Business & Economic Development Scholarships
Campus Life & Student Safety Scholarships
Communication Scholarships
Emerald Coast Scholarships Environmental Scholarships

234
Excellence in Education & Students Success Scholarships
Fine & Performing Arts Scholarships
Health Care Scholarships
Healthy Living Scholarships
International Education Scholarships
Law, Justice, & Social Work Scholarships
Leadership Development Scholarships
Library Scholarships Merit-based Scholarships
Need-based Scholarships
Psychology Scholarships
Science, Technology, Engineering & Math (STEM) Scholarships
Teacher Education Scholarships

Once a decision is made by your Chair and/or Scholarship Committee as to which students will receive Foundation Scholarships, a Scholarship Award Form will be filled out by the Office Administrator. SAVE the form as a pdf and email it to the Foundation Office. Keep a copy for your records. http://uwf.edu/media/university-of-west-florida/offices/foundation/UWFScholarshipAwardsForm.pdf

To view all scholarships, GO TO https://secure.uwf.edu/give/index.cfm?action=viewSection&section=4&allFunds=true

For additional information on scholarships or other forms of giving to the University of West Florida, please contact University Advancement at (850) 474-2758.

State Scholarships
State of Florida scholarships can be found on the Florida’s website. Each scholarship has specific eligibility requirements and application procedures.

Florida Bright Futures
We are notified of your Bright Futures eligibility when you complete the Florida Financial Aid Application; however, you must list UWF as the institution you plan to attend. You may add or update this information on the State of Florida's website or by calling the State at 1-888-827-2004. The Florida Bright Futures is a merit-based scholarship for Florida residents who graduate from a Florida high school. Contact your high school guidance counselor to determine your eligibility.

Florida Academic Scholars - 2013-14: $103 per credit hour
Florida Medallion Scholars - 2013-14: $77 per credit hour
Florida Gold Seal Vocational Scholars - 2013-14: RENEWALS ONLY - $77 per credit hour

The FAFSA is no longer required to receive Bright Futures.
Students are required to repay the Bright Futures award for any course withdrawal.
For additional information on Bright Futures, please review the State's Florida Bright Futures Brochure.
Private Scholarships
Private scholarships come from various sources. These may be awarded through your high school, local community, employer, or through diligent research on your part.
There are several websites that allow you to search for scholarships that you may be eligible for. UWF does not encourage you to ever pay for this service because there are quality sites that are free of charge. Please remember that these searches do not guarantee results, but are simply a tool for you to use.

Scholarship Search Engines
- College Scholarships, [www.CollegeScholarships.com](http://www.CollegeScholarships.com)
- College Resource Network, [www.collegeresourcenetwork.com](http://www.collegeresourcenetwork.com)
- StudentScholarships.org, [www.studentscholarships.org](http://www.studentscholarships.org)

Scholarship Websites
- American Business Women's Assoc., Pensacola Chapter, [www.abwapensacola.org](http://www.abwapensacola.org)
- Department of Homeland Security Scholarship and Fellowship Program, [www.orau.gov/dhsed](http://www.orau.gov/dhsed)
- The Gates Millennium Scholars, [www.gmsp.org](http://www.gmsp.org)
- Hispanic Scholarship Fund, [www.hsf.net](http://www.hsf.net) deadlines vary based on scholarship
- Minority Teacher Education Scholarship, [www.ffmt.org](http://www.ffmt.org) - UWF point of contact Dr. Richard Faessel at 850.857.6311 or rfaessel@uwf.edu
- Scholarship America, [scholarshipamerica.org](http://scholarshipamerica.org)
- UWF College of Business, [uwf.edu/cob/support-resources/scholarships/](http://uwf.edu/cob/support-resources/scholarships/)

Foundation Scholarships
Most departments on campus, but not all, have Foundation Scholarships available for their students to apply for. There are criteria and stipulations for each scholarship. The student should make sure they meet all the criteria before applying. A list of all Foundation Scholarships can be found here: [https://secure.uwf.edu/give/index.cfm?action=viewSection&section=4&allFunds=true](https://secure.uwf.edu/give/index.cfm?action=viewSection&section=4&allFunds=true)

Examples below lists Foundation Scholarships available for full-time History majors.

Archaeology & Public History Scholarships

**A. & L. Delchamps Scholarship**
Endowed scholarships for UWF students majoring in the following... [Learn More](#)
F. Elisabeth Crowell History Scholarship
Endowed Scholarship for history major meeting UWF requirements. Learn More

Hereditary Order of Descendants of Loyalists & Patriots of American Revolution Scholarship
One to three awards given annually. Learn More

History Scholarship
Endowed scholarship for history major with GPA of 3.4 or better... Learn More

J. Earle Bowden Scholarship
Endowed scholarship for history majors with GPA's of 3.4 or better... Learn More

J. P. Daniels Heritage Studies Endowment Fund
Endowed fund provides for support of activities related to heritage studies... Learn More

Michaela Albon Scholarship
Endowed scholarship to student(s) pursuing an undergraduate... Learn More

Pat & Hal Marcus Historical Archaeology Scholarship
Endowed scholarship to one or more graduate students whose major... Learn More

Scarlett S. King Memorial Scholarship
Annual scholarship for History major who is retraining to reenter the work force. Learn More

T.T. Wentworth Scholarship
Endowed scholarship for students majoring in History or Anthropology... Learn More
### UWF Scholarship / Award Form

**Prepared By:** 

**Department:** 

**Contact Number:**  

**Date Submitted:** 

---

<table>
<thead>
<tr>
<th>Student ID</th>
<th>Student's L. Name, F. Name, Middle Initial</th>
<th>Fall Amt. Year</th>
<th>Spring Amt. Year</th>
<th>Summer Amt. Year</th>
<th>Account Number &amp; Name Example: 01234-COB Need Based Schp</th>
<th>Enrollment Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Grand Totals**  

Total  

Total  

Total  

---

It is the responsibility of the department to oversee the selection process, therefore, agreement by the department indicates that the search criteria per the donor's restrictions have been met and that the selection was objective and nondiscriminatory. For audit purposes, the department should maintain documentation regarding the selection.

**Chair/Dean/V.P.**

---

*Foundation Internal Processing Only*

---

*Foundation Approval for Expanding to Financial Aid Only*
SIGNATURE AUTHORIZATION

Description and purpose: The Signature Authorization Form is for Office Administrators and/or faculty to request access to certain functions within Financial Services (i.e., TARs, TERs, Payroll, Timesheets, Property, etc.). Typically this form is prepared for a new hire but can also be prepared when updates are necessary.

Instructions:

1. Go to MyUWF and in the search type in Signature Authorization Form.
2. Fill in the interactive form with the following information
   a. Date
   b. From
   c. Name
   d. Department index number
   e. Documents
   f. Supervisor Title
3. Print the document.
4. Have your supervisor sign form.
5. Return form to Financial Services via Campus Mail.

See form on the next page.
UNIVERSITY OF WEST FLORIDA
Signature Authorization

TO: Financial Services

FROM: 

DATE: 

SUBJECT: Authorized Signature

The following individual is authorized to sign documents and/or access online systems for each respective department number indicated below:

<table>
<thead>
<tr>
<th>Typed Name</th>
<th>Original Signature</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Department Number</th>
<th>Documents **</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Approved by: (signature)
Dept. Head, Director, Project Leader or Next Level Supervisor

Title

** Department Codes

** Financial Services:
A. Travel Authorization and Travel Reimbursement
B. Consulting/Professional Services
C. Invoice Approval
D. Approval of Goods and Services (when receiving report does not fill requirement)
E. Property Inventory
F. Property Transfer
G. Property Surveys
H. Payroll Transmittal List
I. Petty Cash/Change Fund

** Human Resources:
J. Report of Personnel Action (Action Sheets)
K. Employee Time Sheets (in absence of immediate supervisor)
L. Requisition to Fill Vacant Positions
M. Report of Recruitment Activity
N. Prerequisite Request
O. Request for Dual Employment & Compensation

** Financial Aid:
P. Report of Personnel Action (Action Sheets)
Q. Employee Time Sheets (in absence of immediate supervisor)

NOTE: The same person cannot certify time and/or pick up the payroll for the same pay period. These functions must be performed by separate authorized persons.
**SIGNATURES REQUIRED**

*Description and purpose:* Certain forms require signatures from your department chair. On occasion, the chair will not be available to sign and they must have given signature authority to a department member to submit documents in a timely manner. If no one is designated, the document/form may be signed by the Associate Dean or Dean of the college.

Below is a listing of forms used in departments. *This list is not all-inclusive.* Please check the Division of Academic Affairs website for further information.

http://uwf.edu/media/university-of-west-florida/offices/division-of-academic-affairs/resources/Signature_Authority_Academic_Affairs_Jan_2013.pdf

<table>
<thead>
<tr>
<th>Signatures Required: Chair/Dean/Associate Dean</th>
<th>Signatures Required: Chair/Dean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog Year Change Memo</td>
<td>New Faculty and A&amp;P Employee Info Sheet</td>
</tr>
<tr>
<td>Completion of Certificate Program</td>
<td>Key Request: Log in to MyUWF, search for 'Key Request' and complete the form online.</td>
</tr>
<tr>
<td>Petition of Early Certification of Degree Award</td>
<td>Request for Course Offering Outside Academic Year</td>
</tr>
<tr>
<td>Request for VA Approval for Certificate</td>
<td></td>
</tr>
<tr>
<td>SASS Audit Bannered for Graduation</td>
<td></td>
</tr>
<tr>
<td>Survey Request Form: Log in to MyUWF, search for 'Property Survey Request' complete the online form</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Signatures Required: Chair/Dean/Associate Dean/Dean of Graduate School</th>
<th>Signatures Required: Advisor/Chair/Dean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annotation of Courses (Memo)</td>
<td>Appeal for Waiver of Graduation Requirement</td>
</tr>
<tr>
<td>Course Acceptance for Degree Plan (Memo)</td>
<td>Application for Graduation to Graduation Officer in Registrar's Office</td>
</tr>
<tr>
<td>Waiver of GRE Scores (Memo w/attached transcript with posted degree)</td>
<td>Late Addition to Yes/No List Memo in addition to Application for Graduation Form</td>
</tr>
<tr>
<td></td>
<td>Use of Undergraduate Courses in Master’s Programs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Signatures Required: Student/Advisor/Dean/Associate Dean</th>
<th>Signatures Required: Student/Advisor/Chair/Dean/Associate Dean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transient Student Form</td>
<td>Petition for Inclusion in a Degree Program of Courses Completed while a Non-Degree Student</td>
</tr>
<tr>
<td>------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Signatures Required:</strong></td>
<td><strong>Signatures Required:</strong></td>
</tr>
<tr>
<td>Instructor/Chair/Dean/Associate Dean</td>
<td>Advisor/Dean/Associate Dean</td>
</tr>
<tr>
<td>Completion of Credit by Examination</td>
<td>Grade Forgiveness Form (Only for Course Exception)</td>
</tr>
<tr>
<td>Request for Extended Incomplete Grade - <strong>MUST BE ACCOMPANIED by Report on Assignment of Incomplete Grade</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Signatures Required:</strong></td>
<td><strong>Signatures Required:</strong></td>
</tr>
<tr>
<td>Supervisor/ Business Manager</td>
<td>Traveler/Supervisor/ Business Manager</td>
</tr>
<tr>
<td><strong>Student Personnel Action Form</strong></td>
<td><strong>Travel Authorization Request (TAR)</strong></td>
</tr>
<tr>
<td>Personnel Action Form (MyUWF)</td>
<td>Travel Expenses Request (TER)</td>
</tr>
<tr>
<td><strong>Signatures Required:</strong></td>
<td></td>
</tr>
<tr>
<td>Foundation Account Manager/ Business Manager</td>
<td></td>
</tr>
<tr>
<td>Request to Spend Foundation Funds</td>
<td></td>
</tr>
</tbody>
</table>
STUDENT DISABILITY RESOURCE CENTER (SDRC)

Description and purpose: The Student Disability Resource Center (SDRC) views disabilities as an aspect of diversity that is integral to society and to our UWF community. We are committed to the full inclusion of students with disabilities in all curricular and co-curricular opportunities as mandated by Section 504 of the Rehabilitation Act of 1973 and Americans with Disabilities Act. We work collaboratively with students, faculty, and staff to provide reasonable accommodations for students with documented disabilities. We acknowledge that classroom and campus accessibility needs and considerations are expanding as more classes and campus experiences incorporate online and technological components. We are available to discuss any course or campus barriers that may be preventing access to education and an equitable campus experience for our students.

Students must register with SDRC in order to use their services. Sometimes the student and/or professor is not aware of this.

The SDRC offers a variety of accommodations and services for students with documented disabilities including learning disabilities, deaf/hard of hearing, blind/low vision, mobility limitations, ADHD, psychiatric and medical conditions. Some of the accommodations and services provided by SDRC include:

- Sign language interpreting
- Note taking services
- Testing accommodations
- Campus orientation
- Readers/scribes
- JAWS Screen Reader
- Livescribe Smartpen
- Other accommodations as appropriate based on documentation

It is the student’s responsibility to request disability services through the SDRC office.

Student Disability Resource Center
Bldg. 19 / Rm. 100D
11000 University Pkwy.
Pensacola, FL 32514
(850) 474-2387
sdrc@uwf.edu

STUDENT ASSESSMENT OF INSTRUCTION (SAI)

Description and Purpose: This process covers the notification to students and instructors of upcoming assessment availability at the end of each semester. The evaluations/assessments are available to students via My Classes and in eLearning, and the results are available to instructors and authorized departmental staff via Classmate and Tableau reports once grades are posted.

Three weeks prior to a course end date (or in the case of courses offered Par of Term 1, the last day of classes prior to final exam week), a registered student will see a notification on the appropriate classes in MyClasses, and receive an email indicating one or more classes are open for evaluation, with a link to the SAI application. The SAI application summarizes all courses in which the student is registered and assists the student in knowing which evaluations still need to be completed. An evaluation is available to be submitted for each instructor for each course in which the student has not withdrawn. Once a student has submitted the evaluation, he/she cannot submit it again.

Timing:
- Acceptance Period (3 weeks prior to the earliest course end date in the semester through the latest course end date in the semester)
- Students receive an initial notification email
- Students see notification on MyClasses and eLearning class (if applicable)
- Instructors see notification on Classmate
- Students receive a reminder email if outstanding evaluations with only one week left.
- Review Period (Instructors and departments have access to submissions courses when grades have been posted).
- Academic Term Summarization and Distribution (one day following the latest course end date for the semester).
- Academic Year Summarization (one day following the latest course end date for the spring semester).

Procedures and Sub-Processes

1. Student: Completing a Student Assessment of Instruction (SAI)

   Overview

   The Student Assessment of Instruction (SAI) allows students the opportunity to provide anonymous feedback about their courses and instructors. Evaluations are offered exclusively online. They are available starting three weeks prior to the course end date displayed in My Classes and are no longer available after the course end date.
Instructions

Step 1
Access SAI evaluations from the My Classes app or the Student Assessment of Instruction (SAI) app in MyUWF.

Three weeks prior to the course end date, My Classes will link to the evaluation form. The button will read "Evaluations Open" until there are only 48 hours remaining. The button will then read "48 hours left". The hour will continue to count down until 0 remain.

If you attempt to access the Student Assessment of Instruction (SAI) app before evaluations are available, you will be unable to begin an evaluation.
Step 2
Select a course/instructor and click **Evaluate**. If a course has more than one instructor, a separate evaluation will be available for each.

![SAI Evaluation](image)

Step 3
Fill out the evaluation, and then click **Save**.

![SAI Evaluation](image)
Step 4
Back on the main page, there will be an indicator that your evaluation has been submitted.

FAQs

What is the last day I can submit an evaluation?
The course end date is the last day you can complete an evaluation. The course end date is displayed in My Classes (see Step 1). After the course end date, the Student Assessment of Instruction (SAI) app will show a red indicator that evaluations are closed.
Will my instructor know which ratings/comments are from me?
No. Instructors will not have access to any information that associates you with the information you provide. Your feedback will not be made available to your instructor or to the academic department until after grades are posted for the course.

Can I edit my evaluation after I click Save?
No. Evaluations can only be submitted once and cannot be edited after submission.

Viewing Availability of Student Assessment of Instruction (SAI) Evaluations

Overview

The Student Assessment of Instruction (SAI) allows students the opportunity to provide feedback about their classes and instructors. Evaluations are offered exclusively online.

Instructions

Open the Classmate app in MyUWF. If evaluations are open, a blue indicator will be displayed on the course. The number of responses along with the response rate will also be indicated.

Evaluations are open to students three weeks prior to the course end date displayed in Classmate and are no longer available after the course end date. Students can access evaluations from the My Classes app or the Student Assessment of Instruction (SAI) evaluation app in MyUWF.

2. Instructor: Viewing Availability of Student Assessment of Instruction (SAI) Evaluations.
https://confluence.uwf.edu/display/BPL/Viewing+availability+of+Student+Assessment+of+Instruction+%28SAI%29+evaluations

Overview

The Student Assessment of Instruction (SAI) allows students the opportunity to provide feedback about their classes and instructors. Evaluations are offered exclusively online.
Instructions

Open the Classmate app in MyUWF. If evaluations are open, a blue indicator will be displayed on the course. The number of responses along with the response rate will also be indicated.

Evaluations are open to students three weeks prior to the course end date displayed in Classmate and are no longer available after the course end date. Students can access evaluations from the My Classes app or the Student Assessment of Instruction (SAI) evaluation app in MyUWF.

Overview

The SAI rating system permits student to confidentially rate their learning experience at UWF. Students are encouraged to provide feedback about their courses and instructors. Approximately six weeks after grades are submitted, summaries are provided to faculty and administrators in order for the instructor to improve their courses and teaching methods.

Automations

MYM-SAI Initial Communication

Time: This communication will let students know they can complete the online course survey. There is a three-week window to do this, and this communication will go to students three weeks from the course end date. Students will get one of these communications for each distinct end date.

Type: What it Does
Active in Prod Each Morning @ 5:16am CFSched (webUtil)
Status Time Where
MYM-SAI Instructor Communication

Time: MyMessage email to each instructor who has a class ending within the next three weeks from the current date. This email will let instructors know students have received a communication stating they can complete a course survey.
Type: What it Does
Active in Prod Each Morning @ 5:19 AM CFSched (webUtil)
Status Time Where

MYM-SAI Reminder Communication
Time: Reminder email to students one week before the survey deadline.
Type: What it Does
Active in Prod Each morning at 5:18 AM CFSched (webUtil)
Status Time Where

Links
Tableau/Confluence
Tableau Links
MyMessage Rules (Prod)

SAI Initial Communication

Email UWF Student Assessment of Instruction Student Assessment of Instruction (SAI) now available 0
Type Filter Key Message From Message Subject Response Options Response Handler Development Mode

Population Views

SAI Initial Communication sqloracle UWF_BANNER.MYM_VSAI_INITIAL

Population ID Source Type Source View

Message Body

$preferred_name,

You can now complete the Student Assessment of Instruction (SAI) evaluations for your course(s) ending on $end_date. Starting Fall 2014, online evaluations replace the paper evaluations that were previously given in class. Online evaluations will be available through midnight of the course end date.
Your identity will remain anonymous throughout this process. Instructors will not be able to associate you with the information you provide. Your feedback will not be made available to your instructor or to the academic department until after grades are posted for the course.

Your instructor will greatly benefit from the feedback you provide, and we appreciate the time you take to complete the SAI evaluations.

**SAI Instructor Communication**

<table>
<thead>
<tr>
<th>Type</th>
<th>Filter Key</th>
<th>Message From</th>
<th>Message Subject</th>
<th>Response Options</th>
<th>Response Handler</th>
<th>Development Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>UWF Student Assessment of Instruction</td>
<td>Student Assessment of Instruction (SAI) now available</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Population Views**

<table>
<thead>
<tr>
<th>Population Views</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAI Instructor Communication sqloracle UWF_BANNER.MYM_VSAI_INSTRUCTOR</td>
</tr>
</tbody>
</table>

**Message Body**

$preferred name,

Student Assessments of Instruction (SAI) are now open to the students in your course(s) ending on $end date. Starting Fall 2014, online evaluations replace the paper evaluations that were previously given in class. Evaluations will be available to students through midnight of the course end date.

An email containing a link to the evaluation form has been sent to your students. Students can also access SAI forms from the My Classes and Student Assessment of Instruction (SAI) apps in MyUWF.

More information on SAI evaluations.

**SAI Reminder Communication**

<table>
<thead>
<tr>
<th>Type</th>
<th>Filter Key</th>
<th>Message From</th>
<th>Message Subject</th>
<th>Response Options</th>
<th>Response Handler</th>
<th>Development Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>UWF Student Assessment of Instruction</td>
<td>Student Assessment of Instruction (SAI) reminder</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Population Views

SAI Reminder Communication sqloracle UWF_BANNER.MYM_VSAI_REMINDER

Population ID Source Type Source View

Message Body

$preferred_name,

This is a reminder to complete the Student Assessment of Instruction (SAI) evaluations for your course(s) ending on $end_date. You have until midnight on $end_date to provide your feedback.

Your identity will remain anonymous throughout this process. Your feedback will not be made available to your instructor or to the academic department until after grades are posted for the course.

Your instructor will greatly benefit from the feedback you provide, and we appreciate the time you take to complete the SAI evaluations.

3. Instructor: Viewing availability of Student Assessment of Instruction (SAI) evaluations

Viewing SAI Results
https://confluence.uwf.edu/display/BPL/Viewing+SAI+Results

Overview
Instructors, department chairs, deans, and heads, and authorized administrators will be able to use this application to view the results of the SAI Evaluations for each course. Evaluations will become available for viewing once grades have been posted and it is 7 days after the evaluation close date.

Instructions

SAI Results Access
The level of access the user has will determine what terms, colleges, and departments are shown to select from. These will include the current term as well as previous terms that have evaluations.

<table>
<thead>
<tr>
<th>Term</th>
<th>College</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
<td>terms they have taught in</td>
<td>colleges of the departments that they teach course(s) in</td>
</tr>
<tr>
<td>Role</td>
<td>Term</td>
<td>College</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>Chair/Dean/Department Head</td>
<td>terms for the department(s) they are part of</td>
<td>college of the department(s) they are part of</td>
</tr>
<tr>
<td>Admin</td>
<td>all terms</td>
<td>all colleges for each term</td>
</tr>
<tr>
<td>Honors</td>
<td>terms that an honors course was taught in</td>
<td>college of the department in which an honors course(s) was taught</td>
</tr>
</tbody>
</table>

To determine what access the user has, click "My Access" from the menu. A list of roles and departments the user has access too will be displayed.

![My Access](https://example.com/myaccess.png)

**Select the course you want to view**

- Viewers authorized to see data will see a list of terms, colleges, and departments to choose from.
- Once a term is selected, a list of possible colleges will be available to choose from.
- Once a college is chosen a list of departments will be available to choose from.

If there is only one term, college, and department these drop downs will be pre-selected with the values.
Once a department is selected, click view. The user will have the ability to navigate through all the different sections and instructors they have access to. Depending on the user’s access, they can either view the list by Subject or by Instructor. Administrators, department chairs, deans, and heads will be able to view the list by Instructor, instructors will not.

To navigate to a single course, click on the subject to expand the item. A list of courses and each instructor for those courses will be displayed. If grades have been posted, a "View" button will be available to view the evaluation results for the instructor.
Viewing the results for an instructor

When the user clicks the "View" button for a section, they are requesting to see the evaluations for a particular instructor for that section. There will be one main report for these results. The report will have a “Questions” and a “Comments” tab, which will allow the viewer to see the different components of the responses. For each question, the results will be displayed both as a bar graph and as tabular data.
### 1. Expression of expectation for performance in the class

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
<th>Blank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Percentage</td>
<td>0%</td>
<td>50%</td>
<td>0%</td>
<td>0%</td>
<td>50%</td>
<td>0%</td>
</tr>
</tbody>
</table>

### 2. Description of course objectives and assignments

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
<th>Blank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Percentage</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

### 3. Communication of ideas and information

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
<th>Blank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Percentage</td>
<td>0%</td>
<td>0%</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

### 4. Stimulation of interest in the course

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
<th>Blank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Percentage</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Comments for questions 1-8:
- comment 1
- comments 2

Comments for questions 9-18:
This is a test for the comments tab in saisresults
Printing the results

A printable version of the results is also available that contains both the questions and comments together.
Tablet View

When viewed on a tablet, the graph will be displayed beneath the table of data.
Comments for questions 1-8:
comment 1

Comments for questions 9-18:
comments 2

Comments for questions 1-8:
This is a test for the comments tab in saireviews
**Mobile View**

When the site is viewed on a mobile browser, the user will navigate to the desired evaluation report in a similar way. The "View" button will take the user to a report with the same questions and comments tabs.
The tabular data for each question will be hidden by default, but the user can click "View Details" to see the underlying data.
SAI Results

Back to find results

81823 - EDA5191 Ldrshp / Theory & Practice

Semester: Fall 2014
3 / 3 responded 100% response rate

1. Expression of expectation for performance in this class

View Details

2. Description of course objectives and assignments
### SAI Results

Semester: Fall 2014
3 / 3 responded 100% response rate

<table>
<thead>
<tr>
<th>Questions</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Expression of expectation for performance in this class</td>
<td></td>
</tr>
</tbody>
</table>

#### Hide Details

<table>
<thead>
<tr>
<th></th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>2</td>
<td>67%</td>
</tr>
<tr>
<td>Very Good</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Good</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Fair</td>
<td>1</td>
<td>33%</td>
</tr>
<tr>
<td>Poor</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Blank</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Back to find results

81823 - EDA5191 Ldrshp / Theory & Practice
81823 - EDA5191 Ldrshp / Theory & Practice
Semester: Fall 2014
3 / 3 responded 100% response rate

Comments for questions 1-8:
comment 1

Comments for questions 9-18:
comments 2

This is a test for the comments tab in sairesults
SUPPLIES

Description and purpose: Office Administrators order office supplies as needed for their department with a purchasing card (PCard). When ordering supplies, try to look for the best price and value. The following are commonly used state vendors for office supplies: Office Depot, Staples, and Gulf Coast Office Products. Go to MyUWF and in the search type “Go Shopping.” Halfway down on the list you will see Office Supplies and each individual vendor. Click on the link to get to the website for each individual vendor. You will need to contact Procurement (procurement@uwf.edu) for UserName and password information for first-time use.

From the screen shot below, you can see in the upper left corner of the Go Shopping tab is a link for vendor searches. There are a few options: vendors listed alphabetically or vendors listed by name. You can view vendor addresses, phone numbers, email, banner vendor ID numbers, and other items.

Office supplies are delivered typically within 24 hours. You will receive a receipt with your order; but, if you do not you are responsible for getting one. YOU MUST KEEP YOUR RECEIPTS! Receipts are to be given to your PCard approver. The procedure for PCard approvals will be discussed under “PCards.”
Prohibited and Restricted Items Table

(b) All Cardholders and Account Manager and Business Managers shall adhere to the following guidance: (b) An expenditure of state funds must be authorized by law, and the expenditure must meet the intent and spirit of the law authorizing the payment. All applicable statutes and UWF Rules, Policies and Procedures apply not only to purchases made on the PCard, but to any purchases made using institutional funds. Requirements provided in the University of West Florida PCard Program Cardholder and Account Manager and Business Manager Reference Guide (also referred to as “Reference Guide”) must be complied with. *State funds cannot be expended for personal purchases of employees or others or to make unauthorized purchases, as listed below, regardless of any intent to repay. (c) The items below may be prohibited purchases or may only be purchased after meeting special conditions, if any. For purchases where special conditions are provided, Cardholders must attach the necessary written approval and documentation to the receipt for audit purposes. Revised: 3/19/2008

<table>
<thead>
<tr>
<th>ITEM</th>
<th>PROHIBITIONS/SPECIAL CONDITIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Equipment (exceeding $999) – OCO</td>
<td>Prohibited. No Exception. May not purchase with the PCard</td>
</tr>
<tr>
<td>Computer Equipment (exceeding $999) – OCO</td>
<td>Prohibited. No Exception. May not purchase with the PCard</td>
</tr>
<tr>
<td>Furniture</td>
<td>Allowed only for an item under $1000. PCO Agents must give prior written approval. Can only be purchased if Student Fees and specified Grant Account monies are available. [Attach Grant page to receipt.]</td>
</tr>
<tr>
<td>*T-Shirts, Promotional items, Gifts</td>
<td>Can only be purchased if Student Fees and specified Grant Account monies are available. [Attach Grant page to receipt.]</td>
</tr>
<tr>
<td>*Food, Banquets, Pastries, Refreshments</td>
<td>Can only be purchased if Student Fees and specified Grant Account monies are available. [Attach Grant page to receipt.]</td>
</tr>
<tr>
<td>Gasoline/Fuel/Oils</td>
<td>Prohibited for fuels purchased for rented vehicles or non-University owned vehicles (Avis, Hertz etc.) Can only be purchased with PCard when gas is for State Vehicles or for Facilities Maintenance.</td>
</tr>
</tbody>
</table>
*Entertainment, Field Trips
Can only be purchased if Student Fees and specified Grant Account monies are available. [Attach Grant page to receipt.]

*Heaters, Fans, Appliances
Must receive prior written approval from Facilities Services.
Prohibited. No Exception.

*Congratulatory & condolences telegrams, greeting cards and flowers
Prohibited. No Exception.

*Decorative items (globes, statues, potted plants, picture frames, etc.)

*Awards, Plaques, and Document Frames
Can only be purchased if OHR Award Funds, Student Fees, or specified Grant Account monies are available. [Attach Grant page to receipt.]
Prohibited. No Exception.

*Cash, Money orders, or Brokers
UWF Cashiers
Prohibited. No Exception. May not purchase with the PCard

*Other
Other restricted items (such as barbershop charges, lottery tickets) are blocked and your purchase should be denied automatically.
STUDENT ISSUES

*Description and purpose:* There are times when students have problems inside or outside of the classroom and seek help from the Office Administrator in their major department. For problematic issues, contact your department chair or the Dean’s office immediately.

There are numerous types of assistance available for students on campus. Here are just a few as there are too many to list:

- International Student Assistance
- ITS Help Desk
- Student Disability Resource Center (SDRC)
- Student Appeals
- Student Grievances
- Students Rights and Responsibilities
- Student Health Clinic

If a student comes to you with a problem you should try to listen and steer them in the right direction. Sometimes a student may just want someone to talk to. You may come across an irate student at some point. Stay calm and listen. Most of the time the student just wants to vent about a grade or an assignment. If you come across anything that concerns you, make sure to share the students name and information with your chairperson. If your chairperson is unavailable, contact your Dean’s office for assistance. Some student matters should be sent directly to the Dean of Students office. Contact Lusharon Wiley, lwiley@uwf.edu or via phone, 474-2161.

Student issues:
http://uwf.edu/offices/cutla/supporting-pages/respond-to-student-issues

Students Rights and Responsibilities:
http://uwf.edu/offices/student-rights-and-responsibilities

Student Handbook:

Campus Safety:

Student Code of Conduct:

Academic Misconduct:
http://uwf.edu/offices/student-rights-and-responsibilities/academic-misconduct-code/academic-misconduct-code
Division of Student Affairs:
http://uwf.edu/offices/student-affairs
Career Services:
http://uwf.edu/offices/career-services

ERDC:
http://uwf.edu/offices/educational-research-center-for-child-development

Dean of Students:
http://uwf.edu/offices/dean-of-students

Counseling Services:
http://uwf.edu/offices/counseling-psychological-services
TABLEAU

Description and purpose: Tableau is a software application for creating live, interactive data visualizations and dashboards. Tableau enhances reporting, enabling decision makers to see data in a visual format where they can drill-down to report details, independently identify trends and outliers, and validate and verify data.


More information is available in UWF's Confluence.
THESIS AND DISSERTATIONS

Description and purpose: A thesis or dissertation is the culmination of a Master’s or Doctorate degree. It presents the research the student performed for that degree. The primary purpose is to persuade the Thesis/Dissertation Committee that the student has performed and communicated their research with documentation to be worthy of the degree. Thesis and dissertation requirements vary across programs. Each department/program differs but the thesis track is considered essential for students with career goals in advanced research, academic fields, and those interested in pursuing a Ph.D. The doctorate is the culmination of years of study and research to earn and secure the degree.

All theses and dissertations must be submitted electronically through UMI/ProQuest. These submissions are the final copies that have been approved by the Committee and the department; this stage is the final part of the process for clearance by the University and is not an editing stage. Hard copies of signed transmittal forms and signature pages must be delivered to the Graduate School prior to electronic submission. Theses and dissertations will not be accepted for review until these forms have been received by the Graduate School. Submit your Thesis/Dissertation here.

Students should formalize their Thesis/Dissertation Advisor and Committee members. Completion of the thesis/dissertation track is contingent upon identification of a suitable Advisor. Applicants who intend to pursue this track are strongly encouraged to contact faculty in their field of specialization during the application process to secure an Advisor. Once a faculty member has agreed to act as Advisor, a Committee will be formed. The Committee guides students through their course of study and their research. The Committee will advise the student and will decide on any further steps to be taken in shaping the thesis. Students are expected to maintain an active discourse with, and seek advice from, their Committee. Committee meetings should be scheduled by the student or Advisor as specific problems or accumulated research demands.

When a graduate student has finished writing and defending their thesis/dissertation and is ready to begin the editing process, the Office Administrator should direct the student to the Graduate School website for directions and instructions. There are many steps to writing a thesis/dissertation. The student should follow the complete guides and information posted on the Graduate School website very closely. There are forms, grade changes, and deadlines that will need to take place in order for the student to finish the thesis process and graduate on time. All theses/dissertations must be submitted electronically through UMI/ProQuest. These submissions are the final copies that have been approved by the committee and the department; this stage is the final part of the process for clearance by the university and is not an editing stage. Hard copies of signed transmittal forms and signature pages must be delivered to the Graduate School prior to electronic submission. Theses/dissertations will not be accepted for review until these forms have been received by the Graduate School.

Contact: Frances “Jody” Montgomery, Thesis and Dissertation Coordinator
fmontgomery@uwf.edu or 473-7716

Thesis and Dissertation Guide & Deadlines
http://uwf.edu/graduate/academics-research/theses-and-dissertations/
TIME SHEET

See LEAVE REPORTS AND TIME SHEETS
TRAVEL

Description and purpose: The rules and regulations governing the funding of travel are extensive. It is advisable that you seek out training workshops or, at the very least, read the Travel Manual available at the following address: http://uwf.edu/financial/UWF_Travel_Manual_Revised_6-8-10.pdf

You can also access more basic information on the Travel Office via the Campus Directory in MyUWF, click on “Departments”, then “F” to access the Financial Services pages. Click on their internal UWF Intranet website (the house icon), the select “Travel”. The link is also included here: http://uwf.edu/financial/Internal/travel.cfm

When all else fails you can always contact Barbara Crenshaw, x3049. She is the person who processes all travel documents and can answer specific questions.

What is included in this document is a quick rundown of the basic steps for obtaining faculty reimbursements for standard travel when presenting papers at academic conferences. There are many other occasions that might require travel documentation, but for the most part they should include these same basic steps.

In the College of Art, Social Science, and Humanities and the College of Science, Engineering, and Health, College Council sub-committees called the Resource Allocation Committee (RAC), is responsible for submitting travel decisions to the Dean for consideration. The committee reviews the “RAC Form” which faculty submit, then based on the information on each form, they recommend travel funding for faculty travel in each department. Each Department generally sets aside an amount from their Department annual budget for faculty travel. This usually is sufficient only for partial funding and will need supplemental amounts from the Dean’s office and the Provost’s office. This is requested through the RAC form, which is submitted to the Dean’s office at the beginning of each Fall and Spring semester, when requested.

The faculty member completes the form (see sample below), which justifies the travel and provides detailed information on the conference presentation. It is expected that the Department will commit to funding one-third of the trip, with the Dean’s office and Provost’s office funding each one-third up to $750, if the request is successful. Generally, each faculty member is funded only one trip per academic year, depending on available funds. Funds will be transferred to Department accounts via budget transfers from the Dean and Provost offices.

TAR (Travel Authorization Request) form (see below) is used to authorize and encumber the travel funds. The TAR must accompany the RAC when submitted to the Dean’s office. If for some reason, the faculty member is traveling solely on Department or other funds, the TAR must still be submitted to the Dean for authorization of the travel prior to submission to the Travel Office.

The faculty member provides the required information for completion of the form: name of the conference (Purpose of Trip) and presentation title (Statement of Benefits); brief justification
(Mission Critical Statement); and travel arrangements, including times and dates and destination; airfare, or mileage, or car rental costs; conference registration; estimated lodging expenses; and any other possible expenses such as taxi, shuttle service, parking, etc. The meals amount will be $36 times the number of days of travel (minus any meals covered in the conference registration). Calculate the one-third amount to be covered by the Department from the Total Estimated Expenses. Include this amount on the top line of the INDEXES TO BE CHARGED section along with the Department’s funding Index number. (See Banner section in this handbook for a full explanation of University accounting procedures and index designations.)

**NOTE:** If the faculty member is requesting mileage, there is a limit of 900 miles of travel round-trip. For any trips of greater distance, the faculty member is advised to make use of the University’s contract with Avis (No. B133409). If the faculty member still wishes to use their own vehicle, they will be reimbursed only for the amount of an Avis car rental for the same number of days and travel distance. You determine this amount for the TAR form with the Mileage Reimbursement Comparison form (see below and also available on the Travel Office website).

**TER (Travel Expense Report)** form (see sample below) is used to authorize reimbursement after travel. The faculty member provides the required documentation for completion of the form. The original documents and receipts must accompany the form. Documentation includes: conference publication indicating the dates and location of the conference and notation of the faculty presentation within the schedule and all travel receipts (airfare, lodging, etc.), with the exception of meals receipts, since the meals reimbursement is a standard amount.

The TER form must include the TAR number, located via the Outstanding Travel Encumbrances report in Information Navigator. The form includes a day-to-day record of the charges to be reimbursed. The first row on the form indicates the departure date, destination, conference name, and time of departure. Registration costs are generally indicated on this first line and a second row is usually required to report airfare. The rows below report each date of travel for which there is an expense (for meals or lodging, parking, taxi, etc.). Note that mileage claimed should be noted on the first and last days of travel to indicate the round-trip distance. The form automatically calculates the mileage reimbursement amount. The last date of travel should show the destination from and returning to Pensacola with the time of return. Note also the highlighted message increasing the encumbrance. This new amount reflects the total funding provided by the Department, Dean’s office, and Provost’s office. The **NET AMOUNT DUE** should reflect this number, hence the amount entered for LESS comp to traveler indicates the travel costs not covered by the University.

If the faculty member uses a PCard for travel expenses or had their registration or travel fares billed directly to the University, complete the bottom section of the form and report these amounts in the block indicated as LESS UWF PAID CHARGES.

- Obtain signatures from the traveler and Chair (or Dean, if the traveler is the Chair), attach all supporting documents and submit to Travel in the Financial Services Office.
CAS RAC Travel Fund Application

Date: 1/1/11
Name: Cindy Lou Who
Department: Children’s Literature
Chair/Director's Signature: 
Amount Requested from RAC: $353
Tenured: Tenure Earning: X Instructor/Lecturer
Full Professor: Associate Professor: Assistant Professor: 
Purpose of trip: (Limit 400 characters)
Presentation of paper, entitled, “Dr. Seuss and the appreciation of large mammals,” at the Council on Writing for Children.

OTHER Source/Amount of Travel Support Funds including departmental funds: (Limit 240 characters)
Department $300
Justification Statement: Benefits for university/individual & alignment w/institutional mission: (Limit 400 characters)
International visibility, this conference regularly draw 3,000+ scholars from all around the world. Exchange/discovery of new ideas for adaptation to classroom.

Abstract of research to be presented/summary of trip activities: (Limit 800 characters)
My paper argues that current scholarly approaches to the archive of early Children’s literatures overlook that archive’s influence throughout American literary history, particularly in the works of the extremely popular twentieth-century author, Dr. Seuss.

Fill out, print and attach this form to your TAR. CAS RAC app rev 20120907
Travel Forms

Application for Advance on Travel Expense (pdf)

Change Order on Travel Auth. Request (pdf)

Daily Travel Report (xls)

Group Travel Advance Request (pdf)

Group Travel Allocation of Meal Allowances (xls)

Group Travel Summary (xls)

Travel Authorization Request (TAR) (xls)

Travel Expenses Request (TER) (xls)
VENDOR SEARCH AND REGISTRATION

Description and purpose: The Vendor Search is a tool that can be used to search for Vendors who have completed the requirements and are registered in the Banner system.

There are two methods of searching for Vendors:

• “Banner Vendor Search/List” tool located at the "Go Shopping" Page in MyUWF.
• Banner Production (FTIIDEN)

Please click on the following link for detailed instructions on how to find a vendor in Banner Production:

http://uwf.edu/procurement/internal/pages/Vendors_SearchingFor.cfm

When using Banner Production (FTIIDEN) you will:

• NOT be able to see addresses;
• be able to see both active and terminated vendors; and,
• have to be careful you are not selecting a terminated vendor.

When using the “Banner Vendor Search/List” tool, you will:

• NOT see any terminated vendors;
• NOT see active students;
• NOT see active employees; and
• see all active addresses for all active vendors.

Internal PCard and Student Vendor Registration

This page last reviewed/updated: 7/11/2013

This internal registration process can ONLY be used to register PCard Vendors and Student Vendors. UWF students are considered vendors when they will receive payment from The University of West Florida (UWF) for travel reimbursement, prizes, etc.

THE PCARD VENDOR NO LONGER HAS TO BE ENTERED PRIOR TO MAKING THE PURCHASE. ENTER THE PCARD VENDOR AFTER THE CHARGE HAS POSTED WITH THE BANK.

Vendors for Purchase Orders and Direct Payments will NOT be processed through this internal registration page and the vendor must complete the online external registration process via the External Vendor Registration Page (link), in order to meet all Federal, IRS and Security regulations. Note: If you have a guest coming to UWF, you will need the guest to register as a vendor in order to create a TAR, purchase requisition, or Consulting & Professional Service form. The guest must register at the external site before coming to campus. You will not be able to register the guest yourself because the internal registration page is for student vendors or PCard purchases only, and you do not have access to the external registration page.
Please read all information on this page before proceeding. A Help (link) document is provided that includes step-by-step instructions for entering both PCard and Student Vendors internally.

You will receive a confirmation email with the Vendor Banner ID # when the vendor is processed into Banner and ready to use.

ALLOW 72 WORK-DAY HOURS FOR VENDOR TO BE PROCESSED INTO BANNER

See IMPORTANT FACTS below for Foreign Vendor instructions.

When entering the information:
- Do NOT type in all caps.
- Do NOT use punctuation or symbols, i.e. commas (,) periods (.) number (#) and (&).
- Abbreviate when possible: Apartment-Apt, Building-Bldg, Floor-Fl, Suite-Ste, Room-Rm, Department-Dept, Street-St; Boulevard-Blvd, Parkway-Pkwy

IMPORTANT FACTS:

Vendor:
A vendor is an entity or a person who will receive payment from UWF for goods or services. All vendors must be registered and entered in UWF’s Banner system in order for payment to be processed to the vendor.

PCard Vendor Registration:
Please have the following required information BEFORE beginning this online PCard Vendor registration process:
- Cardholder Name
- Dollar Amount of Purchase
- Date of Transaction
- PCard Vendor Name
- Address

Foreign Vendors:
Due to IRS requirements, a foreign vendor must also provide UWF their applicable W-8 IRS Form. If a Foreign PCard Vendor is being registered:

- It is the cardholder's responsibility to either obtain the applicable IRS W-8 Form from the Foreign PCard Vendor (and then forward the W-8 Form to Procurement); OR,
• Enter the Foreign PCard Vendor's email address in the "Vendor's Email" field to assure they get email instructions on where to send the applicable W-8 Form.

**PCard and Student Vendor Registration:**
The following information is not required, but helpful in processing PCard and Student Vendors:

• FEI/TIN (9-digit Tax Identification Number) OR SSN (if Individual or Sole Proprietor);
• Student UWF ID (9-digit number beginning with 97);
• Telephone Number; and,
• Email Address - **NOTE:** Although the email address is not required, it is very important, especially for foreign vendors to provide the email address. If you do not provide the foreign vendor's email address, you are then responsible for trying to obtain that foreign vendor's required W-8 form.

For more vendor information, go to the Internal Procurement page at the following link:

[http://uwf.edu/procurement/internal/](http://uwf.edu/procurement/internal/)
VOLUNTEERS

Description and purpose: Student volunteering can be a rewarding experience to both the department and the student. The department benefits by having extra help in the office and for the faculty. The student benefits from the work experience, as well as the social aspect of working closely with the faculty and other students. Volunteering can sometimes lead to a graduate assistantship for advanced students.

Departments utilizing volunteers should have their volunteers complete the following application and worker agreement and submit it to Human Resources. A copy of the Drug-Free Workplace policy and Fraudulent or Wrongful Acts policy should be provided to the volunteer for his/her information.

- Volunteer Application
- Volunteer Worker Agreement
- Drug Free Campus Brochure
- Fraudulent or Wrongful Acts Policy

All four documents can be found on the Human Resources Forms web page.

If you utilize volunteers for Summer Camps who work or assist for more than ten hours per month, Florida Law requires that a Level II Background Screening be completed prior to the volunteer beginning service. Additional information regarding summer camp volunteers can be found at the Florida Department of Children and Families.

**Please remember that a potential employee cannot be considered a volunteer while waiting for the successful completion of a pre-employment background screen.**

If you have any questions about volunteers and what is required, please contact Jamie Sprague, at jsprague@uwf.edu or at (805) 474-2156 or April Sargent, at asargent@uwf.edu or at (850) 474-2606 for additional assistance.
WEB DEVELOPERS

Description and purpose: Web Developers are the group of certified University Web Developers that have been trained and are actively supporting the departmental websites for uwf.edu.

Instructions
1. For a complete listing of all UWF Web Developers SEARCH Technology Support Providers in MyUWF.
2. CLICK on Technology Support Providers then SELECT Web Developers.

3. SCROLL down to find the department you are seeking.
4. You can display the list by Department or by person by CLICKING the appropriate link at the top of the list.
WEBSPACE (SPACE INVENTORY)

_Description and purpose:_ Every five years, UWF must submit to the Department of Health and Human Services a proposal to reauthorize its indirect cost rate (F&A). A key component is the documentation of space and equipment used in research. In order to obtain accurate space data, the University requires that every department verify the rooms assigned to them. To help simplify the process the University has subscribed to a web-based space repository (WEBSPACE) which allows department representatives to update room numbers, Principal Investigators (PI), occupants, program and discipline codes, and department index. The last report was submitted in October 2013. The departments will be notified when it is again time for training to submit WEBSPACE reports, and appropriate training will be provided.
WORK ASSIGNMENT LETTERS (REGULAR FACULTY)

Description and purpose: The CAERS site on MyUWF is the official means for reporting faculty activities as they relate to their work assignments and is the site used to produce the Faculty Work Assignment letters. The Dean’s Office will email the Office Administrator and Chairperson each July to remind them of the deadline for faculty work assignment letters. The letters are typically due mid-July.

All assignments will be made in consonance with the collective bargaining agreement. The written document will specify class assignments and address research projects and service functions. The work assignment is the joint product of the Chairperson and the individual faculty member.

The Office Administrator must access this site each Summer to set up the work assignment letters for all full-time faculty in their department for the following academic year. The workload for a full-time faculty member is measured in contact hours, the minimum being 12 hours. Each three-hour course taught is considered to be three contact hours, so the standard full-time teaching load is four 3hr courses. All tenure-line faculty are assigned three contact hours for research and creative activities, so their base teaching load is three 3hr courses for a total of 9 contact hours of teaching each semester. Other reductions to this number will take effect when faculty have specialized assignments related to administration or departmental needs. Some examples of such assignments are noted below.
INSTRUCTIONS - On the CAERS site, **CHOOSE** the correct Fall semester in the drop down box in the upper left corner, then **SELECT** “Build/Edit Assignment Letter.”
USE the drop down boxes to choose department and a specific faculty member. CLICK on Continue.
You will now be able to view the faculty assignment letter template. **CHECK** the title and rank in the salutation. Sometimes the default incorrectly indicates “Mr.” when it should be “Dr.”, or vice versa, or the rank may not be up to date.

The template includes a series of paragraphs, which are included in all letters, and a series of paragraphs that are to be included only when they apply to the year’s assignment for the particular faculty member. These paragraphs have a checked box beside them. If they should not be included in someone’s assignment, simply click in the box to exclude that paragraph.

**INSTRUCTION** - The first section covers the teaching assignment. Note the number of contact hours for the Fall and Spring semesters, then list all courses to be taught, including course and section number and course title, in the Additional Narrative box. The Spring section can simply say TBA if the Spring schedule has not been set.

**NON-INSTRUCTIONAL ACTIVITIES** - The number of contact hours entered for Fall and Spring should be sufficient to bring the total number of hours to 12 for each semester, when added to the instruction contact hours. Any specialized assignment can be mentioned here in the Additional Narrative box, for example noting that someone is UFF representative, or Director of an office within a department, or Coordinator for a specific degree program within a department.
ADVISING SECTION – If this section is to be included in the letter and there is a specific student population within the Department this faculty member will serve, then this should be noted in the narrative box.

SCHOLARSHIP AND CREATIVE ACTIVITIES – this paragraph should be included only for tenure-line faculty. Whether or not specifics are noted in the narrative box varies by Department.

UNIVERSITY, PUBLIC, AND PROFESSIONAL SERVICE - this section is noted when a faculty member is providing any special service to the University or community and particulars about that assignment should be noted in the narrative box. For example, the letter for Director of Composition has the following, “Direct the Department’s Composition Program for the University’s General Studies Program.”

PROGRAM COORDINATION OR ADMINISTRATION - this paragraph is included for any faculty member providing an administrative function for the University. The Department Chair would be the primary example for any Department, but other faculty may have roles outside their Department. Two examples are the Director of the University’s Writing Lab and the Assistant Director for the University Honors program.

The final two narrative boxes under the standard paragraphs on SPECIFIC ASSIGNMENTS, SUMMARIES OF ASSIGNMENTS, OR FURTHER EXPLANATIONS OF ASSIGNMENTS IN ABOVE SECTIONS ETC… and PERFORMANCE EVALUATION AND REPORTING OF ATIVITIES are to be used in the event that there are any other special circumstances in the work assignment that might affect these areas.

SAVE the letter draft, then VIEW the letter to check the content before SUBMITTING the letter into the system for signatures. Note that the path within RouteIt varies by College.
FACULTY ASSIGNMENT LETTER TRACKING - (listed just below “Build/Edit Assignment Letter”) allows you to check on where the letter is within the system. If for some reason a letter needs to be edited, you can begin the second version via the “Copy to New Letter” button, which will automatically populate the new version to allow easier editing. Once the letter status is noted as “Completed”, you can select “View Letter” in order to print file copies, if needed.
WORKSHOPS AND TRAINING

Description and purpose: UWF is committed to empowering each individual we serve with knowledge and opportunities to contribute responsibly and creatively to a complex world. Staff Development and Training Programs offered by Human Resources meet this value by offering a wide variety of courses.

Log into MyUWF: https://my.uwf.edu/ and in the search type “Training Reservation Desk” https://nautical.uwf.edu/comm/desk/main.cfm for employee training opportunities and training history.

Class Listing

With appropriate supervisory approval, employees are encouraged to attend professional development training. Hours spent in training are considered regular work hours. Registration priority is given to salaried, line item employees. Temporary employees may attend on a space-available basis, provided the employee pays the costs. Workshops provide specific procedural and technical training dealing with university policy and procedures, supervisory and interpersonal skills development, personal development, and computer skills.

Reservation Desk

Employees may view the training schedule calendar and register for courses through the Training Calendar/Reservation Desk in MyUWF or by calling 2694.

Workshops offered by Staff Development and Training provide specific procedural and technical training dealing with university policy and procedures, supervisory and interpersonal skills development and personal development. With appropriate supervisory approval, employees are encouraged to attend professional development training. Hours spent are considered regular work hours. Registration priority is given to full-time University Work Force employees.

Staff Development and Training offers a variety of training DVD's and course material that is available for check out. To checkout training materials from Staff Development and Training, review the Training Library (http://uwf.edu/media/university-of-west-florida/offices/hr/documents/traininglib.pdf) and contact LaBratta Epting at 850-474-2292.
Leadership, Enhancement, Activities and Development (LEAD) Program

Applications are now being accepted for the 2015-16 LEAD: The Staff Version, a year-long UWF leadership development program to begin in September. Selection involves choosing a cross section of people from across the university. The deadline to apply is August 1, 2014. For more information please follow this link Staff LEAD Program: http://uwf.edu/offices/academic-affairs-division/awards-recognition/lead-the-staff-version/ to the Academic Affairs host site for this program. The program is directed by Athena du Pre (adupre@uwf.edu), a professor in Communication Arts who directed LEAD previously. She welcomes questions and suggestions; please feel free to contact her.

Request for Educational Leave with Pay (when funded)

Full-time University Work Force or faculty employees with three (3) or more years of continuous service with UWF may apply for educational leave. Educational leave programs are announced to staff each spring. Educational leave may be taken in one semester of full-time school attendance with no work requirements or two semesters of half-time school attendance with half-time work requirements. This is an excellent educational opportunity to earn your full salary, accrue leave, and pursue your educational goals. When funding is available, the Educational Leave with Pay program can be requested by using this form: (http://uwf.edu/media/university-of-west-florida/offices/hr/documents/Educational-Leave-With-Pay.pdf).

Mandatory University Training

Dates for Preventing Discrimination and Harassment Training (for Supervisors and for Non-Supervisory Employees) have been added to the Training Reservation Desk: https://nautical.uwf.edu/comm/desk/main.cfm. This training may also be taken anytime online via eLearning. You may register through the Training Reservation Desk: https://nautical.uwf.edu/comm/desk/main.cfm. For more information contact LaBratta Epting at 850-474-2292 or Sharon Jones at 850-474-2611. The current dates available for the mandatory Preventing Discrimination and Harassment Training are:

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 28, 2015</td>
<td>1:00 pm- 2:30 pm</td>
<td>Non-Supervisory Employees</td>
</tr>
<tr>
<td></td>
<td>10:30 am - 12:30 pm</td>
<td>Supervisors</td>
</tr>
<tr>
<td>July 13, 2015</td>
<td>8:30 am - 10:00 am</td>
<td>Non-Supervisory Employees</td>
</tr>
<tr>
<td></td>
<td>10:30 am - 12:30 pm</td>
<td>Supervisors</td>
</tr>
</tbody>
</table>
In addition, the Reporting Child Abuse and Neglect for Professionals training may be taken anytime online via eLearning. You may register through the Training Reservation Desk: https://nautical.uwf.edu/comm/desk/main.cfm. For more information contact LaBratta Epting at 850-474-2292 or Sharon Jones at 850-474-2611.

VERIFICATION OF TRAINING PROGRAM COMPLETION FORM

Upon completion of the required courses for any of the certificate programs, the participant must complete a Verification of Training Program Completion Form and submit to Human Resources to receive a certificate. The Verification of Completion of Training Program Form may be found here: http://uwf.edu/media/university-of-west-florida/offices/hr/forms/Verification-of-Training-Program-Completion.pdf.

- Certificate in Leadership & Management
  The Certificate in Leadership and Management program will help maximize the leadership qualities you already possess while allowing you to cultivate new strengths through education and training—all within a framework designed with the goals of the University in mind.
- Certificate in Leadership & Management
- Certificate in Compliance
- The Certificate in Compliance Training Program is designed to educate UWF employees on compliance training best practices, actions regarding federal and state laws governing the University, and policies that relate to their work environment.
- Certificate in Compliance
- Certificate in Administrative Services
  The Certificate in Administrative Services is a program designed to offer courses which will develop employees’ skills in the area of administrative processes and procedures.
- Certificate in Administrative Services

The Staff Development and Training team in Human Resources is always looking for ways to develop and design new training opportunities for the campus community. We are committed to providing training to help our employees learn necessary skills, become more efficient, and experience professional and personal growth. If you or a representative from your department would like to educate the campus community on an area of your expertise and have the training advertised in the Human Resources training calendar, please complete the Request for Training form: http://uwf.edu/media/university-of-west-florida/offices/hr/forms/Request-for-
This form should be completed prior to the course being advertised. If you have any question please contact LaBratta Epting at 850-474-2292 or Sharon Jones at 850-474-2611.

Announcements

There are currently no announcements

Class Listing

Designing a Quality Online Course (6-week fully-online course in eLearning)
   Class Info Begins Monday, March 16 2015 at 12:00 AM, 10 of 30 participants signed up.
   Class Info Begins Monday, May 18 2015 at 12:00 AM, 4 of 30 participants signed up.

Teaching a Quality Online Course (6-week fully online course in eLearning)
   Class Info Begins Monday, March 16 2015 at 12:00 AM, 6 of 30 participants signed up.
   Class Info Begins Monday, June 29 2015 at 12:00 AM, 6 of 30 participants signed up.

ATC Live@Lunch - Ideas to Enhance your eLearning Course
   Class Info Begins Wednesday, April 8 2015 at 11:30 AM, 1 of 50 participants signed up.

ATC Live@Lunch - Using Intelligent Agents in eLearning
   Class Info Begins Wednesday, April 22 2015 at 11:30 AM, 0 of 50 participants signed up.
Instructional Technology Workshop - Clickers

Class Info Begins Friday, March 27 2015 at 10:00 AM, 0 of 20 participants signed up.
Class Info Begins Friday, April 17 2015 at 1:30 PM, 0 of 20 participants signed up.

Instructional Technology Workshop - Google Drive / Docs

Class Info Begins Friday, March 13 2015 at 1:30 PM, 19 of 25 participants signed up.
Class Info Begins Friday, April 3 2015 at 1:30 PM, 1 of 25 participants signed up.

Instructional Technology Workshop - Lecture Capture / Video Tools

Class Info Begins Friday, March 27 2015 at 1:30 PM, 2 of 20 participants signed up.
Class Info Begins Friday, April 17 2015 at 10:00 AM, 0 of 20 participants signed up.

Instructional Technology Workshop - Prezi

Class Info Begins Friday, March 20 2015 at 10:00 AM, 4 of 25 participants signed up.
Class Info Begins Friday, April 10 2015 at 1:30 PM, 1 of 25 participants signed up.

Instructional Technology Workshop - Atomic Learning

Class Info Begins Friday, April 3 2015 at 10:00 AM, 2 of 25 participants signed up.

Banner Navigation (Banner Basics) Online eLearning Course: Sign up today, take the course tomorrow

Class Info Begins Tuesday, May 5 2015 at 8:00 AM, 31 of 1000 participants signed up.

PCard Basic Online eLearning Course: Sign up today, take the Online eLearning course tomorrow

Class Info Begins Tuesday, May 5 2015 at 8:00 AM, 18 of 1000 participants signed up.
PCard Manager Online eLearning Course: Sign up today, take the Online eLearning course tomorrow
Class Info Begins Tuesday, May 5 2015 at 8:00 AM, 7 of 1000 participants signed up.

Banner Requisition Training: Sign up today, take the Online eLearning course tomorrow
Class Info Begins Tuesday, May 5 2015 at 8:00 AM, 6 of 1000 participants signed up.

Banner Requisition Approver Training: Sign up today, take the Online eLearning course tomorrow
Class Info Begins Tuesday, May 5 2015 at 8:00 AM, 3 of 1000 participants signed up.

Budget Certificate-Where Does the Money Go?
Class Info Begins Thursday, April 9 2015 at 1:30 PM, 2 of 30 participants signed up.
Class Info Begins Tuesday, September 8 2015 at 9:00 AM, 0 of 30 participants signed up.
Class Info Begins Thursday, October 22 2015 at 1:30 PM, 0 of 30 participants signed up.

Budget Certificate-Budget Basics (Non RSP)
Class Info Begins Thursday, April 16 2015 at 1:30 PM, 4 of 30 participants signed up.
Class Info Begins Tuesday, September 15 2015 at 9:00 AM, 0 of 30 participants signed up.
Class Info Begins Thursday, October 29 2015 at 1:30 PM, 0 of 30 participants signed up.

Budget Certificate - Budget Transfers & Reports
Class Info Begins Thursday, April 23 2015 at 1:30 PM, 4 of 30 participants signed up.
Class Info Begins Tuesday, September 22 2015 at 9:00 AM, 0 of 30 participants signed up.
Class Info Begins Thursday, November 5 2015 at 1:30 PM, 0 of 30 participants signed up.

Confluence Basics
Class Info Begins Friday, March 20 2015 at 1:30 PM, 18 of 25 participants signed up.
Class Info Begins Friday, April 10 2015 at 10:00 AM, 5 of 25 participants signed up.
Class Info Begins Friday, April 24 2015 at 10:00 AM, 2 of 25 participants signed up.

Student Planner and Degree Works
Class Info Begins Wednesday, April 15 2015 at 10:00 AM, 0 of 25 participants signed up.
Class Info Begins Friday, April 17 2015 at 1:30 PM, 0 of 25 participants signed up.
Class Info Begins Thursday, April 23 2015 at 8:30 AM, 0 of 25 participants signed up.
Class Info Begins Monday, April 27 2015 at 2:30 PM, 0 of 25 participants signed up.
Class Info Begins Wednesday, May 13 2015 at 10:00 AM, 0 of 25 participants signed up.
Class Info Begins Monday, May 25 2015 at 8:30 AM, 0 of 25 participants signed up.
Class Info Begins Tuesday, June 2 2015 at 8:30 AM, 0 of 25 participants signed up.
Class Info Begins Monday, June 8 2015 at 1:00 PM, 0 of 25 participants signed up.

FERPA Training for UWF Employees
Class Info Begins Sunday, January 1 2017 at 8:00 AM, 26 of 10000 participants signed up.

Family Education Rights and Privacy Act (FERPA)
Class Info Begins Wednesday, April 22 2015 at 9:00 AM, 9 of 30 participants signed up.

Employee Credit Card Security Training
Class Info Begins Thursday, March 26 2015 at 1:30 PM, 12 of 30 participants signed up.

Workers' Compensation and Safety Training for Supervisors
Class Info Begins Wednesday, March 11 2015 at 1:30 PM, 3 of 30 participants signed up.

Medical Leave of Absence and FMLA
Class Info Begins Monday, March 23 2015 at 9:00 AM, 10 of 30 participants signed up.

The Americans with Disabilities Act
Class Info Begins Thursday, March 12 2015 at 9:00 AM, 10 of 30 participants signed up.

Standards of Conduct
Class Info Begins Wednesday, March 25 2015 at 9:00 AM, 11 of 30 participants signed up.

Patient Protection and Affordable Care Act (PPACA)
Class Info Begins Monday, April 27 2015 at 9:30 AM, 4 of 30 participants signed up.

Title IX
Class Info Begins Wednesday, March 25 2015 at 1:30 PM, 3 of 30 participants signed up.

PeopleAdmin 7 Position Management (New Software)
Class Info Begins Wednesday, March 11 2015 at 9:00 AM, 10 of 26 participants signed up.

Providing Excellent Customer Service
Class Info Begins Wednesday, March 18 2015 at 9:00 AM, 7 of 30 participants signed up.

Services You Can Use! - Business & Auxiliary Overview
Class Info Begins Thursday, March 26 2015 at 9:00 AM, 34 of 35 participants signed up.

When Employment Income Fades: Social Security and Medicare
Class Info Begins Friday, March 20 2015 at 1:30 PM, 21 of 30 participants signed up.

A Different Kind of Savings Plan: The 457 Deferred Compensation Program
Class Info Begins Friday, March 27 2015 at 1:30 PM, 15 of 30 participants signed up.

Financing and Planning Your Benefits Transition to Retirement
Class Info Begins Friday, March 13 2015 at 1:30 PM, 17 of 30 participants signed up.

Informational Sessions on 9 Month Faculty Salary Paid over 12 months
Class Info Begins Thursday, March 26 2015 at 1:30 PM, 1 of 30 participants signed up.
Class Info Begins Friday, March 27 2015 at 9:30 AM, 0 of 30 participants signed up.
Class Info Begins Wednesday, April 1 2015 at 9:30 AM, 1 of 30 participants signed up.
Class Info Begins Wednesday, April 8 2015 at 9:30 AM, 1 of 30 participants signed up.
Mandatory Training - Preventing Discrimination and Harassment for Non-Supervisory Employees

Class Info Begins Tuesday, April 28 2015 at 1:00 PM, 31 of 40 participants signed up.

Class Info Begins Monday, July 13 2015 at 8:30 AM, 7 of 30 participants signed up.

Class Info Begins Thursday, September 24 2015 at 8:30 AM, 6 of 30 participants signed up.

Mandatory Training - Preventing Discrimination and Harassment for Supervisory Employees Only

Class Info Begins Tuesday, April 28 2015 at 3:00 PM, 17 of 30 participants signed up.

Class Info Begins Monday, July 13 2015 at 10:30 AM, 9 of 30 participants signed up.

Class Info Begins Thursday, September 24 2015 at 10:30 AM, 8 of 30 participants signed up.

Mandatory Training - Preventing Discrimination and Harassment for Supervisors Online

Class Info Begins Tuesday, May 5 2015 at 8:00 AM, 41 of 1000 participants signed up.

Mandatory Training: Preventing Discrimination and Harassment for Supervisors Online

Class Info Begins Wednesday, April 1 2015 at 8:00 AM, 0 of 0 participants signed up.

Mandatory Training - Preventing Discrimination and Harassment for Non-Supervisory Employees Online

Class Info Begins Tuesday, May 5 2015 at 8:00 AM, 93 of 1000 participants signed up.

Mandatory Training: Preventing Discrimination and Harassment for Non-Supervisory Employees Online

Class Info Begins Wednesday, April 1 2015 at 8:00 AM, 0 of 0 participants signed up.

Mandatory Training (for Administrators): Reporting Suspected Child Abuse and Neglect for Professionals Online

Class Info Begins Tuesday, May 5 2015 at 8:00 AM, 3 of 1000 participants signed up.

Mandatory Training (for Administrators): Reporting Suspected Child Abuse and Neglect for Professionals Online
Class Info Begins Wednesday, April 1 2015 at 8:00 AM, 0 of 0 participants signed up.

New Employee Orientation
Class Info Begins Wednesday, March 11 2015 at 8:30 AM, 16 of 30 participants signed up.
Class Info Begins Wednesday, April 15 2015 at 8:30 AM, 0 of 30 participants signed up.
Class Info Begins Wednesday, May 13 2015 at 8:30 AM, 0 of 30 participants signed up.
Class Info Begins Wednesday, June 17 2015 at 8:30 AM, 0 of 30 participants signed up.
Class Info Begins Wednesday, July 15 2015 at 8:30 AM, 0 of 30 participants signed up.
Class Info Begins Wednesday, August 5 2015 at 8:30 AM, 0 of 30 participants signed up.
Class Info Begins Wednesday, August 19 2015 at 8:30 AM, 0 of 30 participants signed up.
Class Info Begins Wednesday, September 16 2015 at 8:30 AM, 0 of 30 participants signed up.
Class Info Begins Wednesday, October 14 2015 at 8:30 AM, 0 of 30 participants signed up.
Class Info Begins Wednesday, November 18 2015 at 8:30 AM, 0 of 30 participants signed up.
Class Info Begins Wednesday, December 9 2015 at 8:30 AM, 0 of 30 participants signed up.

CMS Content Provider Basic Training
Class Info Begins Wednesday, March 11 2015 at 2:00 PM, 10 of 24 participants signed up.
Class Info Begins Tuesday, May 12 2015 at 2:00 PM, 2 of 24 participants signed up.
Class Info Begins Wednesday, July 15 2015 at 2:00 PM, 0 of 24 participants signed up.

Classes in session today

- Budget Certificate - Budget Transfers & Reports starts today at 9:00 AM.
WORKSTATION MANAGER

Description and purpose: Information maintained by the University of West Florida is one of our most valuable assets and is made available to all employees who have a legitimate need for it. While the University is the owner of all administrative data, individual divisions and colleges have stewardship responsibilities for portions of this data via the Workstation Manager program.

University Workstation Managers (WSMs) are valued ITS partners and provide a valuable service to the University by acting as data stewards and security administrators for a designated college or department. WSMs establish departmental control for access to sensitive administrative data in order to prevent unauthorized access or disclosure, and determine appropriate levels of protection for the information technology resources under their control.

WSMs establish a security record within the ITS Security Administration guidelines identifying the user's allowable transactions. The security level required for information technology systems will be determined based upon the criticality of the system and/or the confidentiality of the data processed.

Users accessing data must observe requirements for confidentiality and privacy, must comply with protection and control procedures, and must in all cases accurately present the data in which they are entrusted. WSMs will require a signed statement from all users and their supervisors indicating their specific data access and establishing an acknowledgment of understanding of the level of access provided and their responsibility for the data they access.

SSN Security Access Request and Authorization Guidelines
In general, Workstation Managers and Security Administrators will be required to determine business need for access and initially approve requests by people who wish to enter and/or view SSN data in UWF information systems. There must be a valid business purpose for any user to have access to any SSN data.

Last 4 digits of SSNs
Workstation Managers and Security Administrators may process requests for security access that allows the requesters of that access the ability to view only the last 4 digits of SSNs. These types of requests include things like access to the CICS WFID screen at security level 0. Workstation managers are responsible to determine the business need for access to WFID screen. To assist with this, the following questions should be asked:

Why do you need the last four digits of the SSN? If it is to look up students, the SSN is no longer used. Student records will be accessed through the UWF ID. If cross referencing “old records”, employees may continue to use RSNB which will show the name, UWF ID, DOB, and last semester of attendance.

What will the SSN be used for? Since records cannot be accessed using the SSN, what will be the need for the SSN? It may be valid if reporting to an outside contracted agency but that must be preapproved. The authorization of SSN should be discouraged unless absolutely needed. Explore other alternatives to meet needs.
9-digit SSNs
Anyone requesting access to UWF information systems that will result in the ability to enter or view entire SSN's will need to justify the need with a business purpose that supports the need and then get the written approval of their department head that the access is justified. These types of requests include access to CICS WFID (full SSN version), full SSN version of RSAP, etc. Many screens will have access at different levels whereby a higher authorization level allows the person to see the SSN as well as the WFID screens at security level greater than zero.

Workstation Managers and Security Administrators will not process requests that will result in full display of SSN data without the approval of the proper authority.

Steps to Establish and Maintain Accounts - http://uwf.edu/wsm/internal/flow.pdf

Account Authorization Forms

Workstation Manager Forms
- Admissions - http://uwf.edu/wsm/internal/ad.pdf
- Cashier - http://uwf.edu/wsm/internal/uc.pdf
- ITS - http://uwf.edu/wsm/internal/its.pdf
- Registrar - http://uwf.edu/wsm/internal/rr.pdf
- SASS - http://uwf.edu/wsm/internal/sass.pdf

Employees Changing Departments
It is recommended that when someone changes departments, the former WSM delete the PMEN account and the new WSM create a new PMEN account. The CICS account does not change.

This will ensure that someone doesn't retain access to transactions that were required for a former position.

Deleting Accounts
When someone leaves a WSM's area, the PMEN account should be deleted as soon as is feasible.

To delete an entire account:
1. On PSED, display the account for the user-id you wish to delete.
2. Type “DELETE” in the ID field, replacing the UWF ID.
3. Enter your PIN number.
4. Press the F3 key as many times as necessary to delete all pages.

Deleting the PSED record will automatically delete all PSET entries associated with the user-id. Any other accounts will be deleted upon termination by Human Resources.
Policies

- Computer Crimes Act - [http://www.clas.ufl.edu/docs/flcrimes/section2_1_1.html](http://www.clas.ufl.edu/docs/flcrimes/section2_1_1.html)
- Registrar - [http://uwf.edu/catalog/reg2.cfm#regrecords](http://uwf.edu/catalog/reg2.cfm#regrecords)
Workstation Managers

Division and college Workstation Managers (WSMs) determine levels of access for users of administrative data, and are responsible for monitoring and implementing security measures for the data under their control.

Areas not represented by a Workstation Manager should contact an ITS Security Administrator.

<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
<th>Phone/Email</th>
<th>User ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gregory Dziadon</td>
<td>Student Affairs</td>
<td>473-7340 <a href="mailto:gdziadon@uwf.edu">gdziadon@uwf.edu</a></td>
<td>WFGED</td>
</tr>
<tr>
<td>Anna Fair</td>
<td>Registration &amp; Records</td>
<td>474-2247 <a href="mailto:AEFair@uwf.edu">AEFair@uwf.edu</a></td>
<td>WFAEF</td>
</tr>
<tr>
<td>Jonathon Holladay</td>
<td>College of Business</td>
<td>474-2089 <a href="mailto:jholladay@uwf.edu">jholladay@uwf.edu</a></td>
<td>WFJDH1</td>
</tr>
<tr>
<td>Lynnsey Horton</td>
<td>College of Arts and Sciences</td>
<td>474-3160 <a href="mailto:lhorton@uwf.edu">lhorton@uwf.edu</a></td>
<td>WFLGH</td>
</tr>
<tr>
<td>La Rhonda Moneyham</td>
<td>NWRDC Security Manager</td>
<td>474-2566 <a href="mailto:lmoneyha@uwf.edu">lmoneyha@uwf.edu</a></td>
<td>WFLKM</td>
</tr>
<tr>
<td>Katherine Parker</td>
<td>SASS</td>
<td>474-3159 <a href="mailto:kwilson@uwf.edu">kwilson@uwf.edu</a></td>
<td>WFKDW</td>
</tr>
<tr>
<td>Ali Penton</td>
<td>Human Resources</td>
<td>474-2601 <a href="mailto:apenton@uwf.edu">apenton@uwf.edu</a></td>
<td>WFATP</td>
</tr>
<tr>
<td>Candace Perez</td>
<td>Purchasing</td>
<td>474-2630 <a href="mailto:cperez@uwf.edu">cperez@uwf.edu</a></td>
<td>WFCMP</td>
</tr>
<tr>
<td>Doyle Pitts</td>
<td>University Controller</td>
<td>474-3028 <a href="mailto:dpitts@uwf.edu">dpitts@uwf.edu</a></td>
<td>WFDCP</td>
</tr>
<tr>
<td>Jennifer Scheibe</td>
<td>Admissions</td>
<td>474-2230 <a href="mailto:jscheibe@uwf.edu">jscheibe@uwf.edu</a></td>
<td>WFJJS1</td>
</tr>
<tr>
<td>Thomas Schwingle</td>
<td>Off Campus (Eglin &amp; FWB)</td>
<td>863-6584 <a href="mailto:tschwingle@uwf.edu">tschwingle@uwf.edu</a></td>
<td>WFTMS1</td>
</tr>
<tr>
<td>Laura Sommers</td>
<td>College of Professional Studies</td>
<td>473-7404 <a href="mailto:lsommers@uwf.edu">lsommers@uwf.edu</a></td>
<td>WFLDS</td>
</tr>
<tr>
<td>Brian Whitney</td>
<td>Academic Affairs</td>
<td>474-3081 <a href="mailto:bwhitney@uwf.edu">bwhitney@uwf.edu</a></td>
<td></td>
</tr>
</tbody>
</table>
This handbook is a living document and will change over time. The Office Administrator Handbook Project Committee Members include the following.

Lead Project Committee Members.
From the College of Arts, Social Science and Humanities: Gabi Grosse (History), Karen Haworth (English), and Sheila Freeman (Government).

Contributing Committee Members.
From the College of Business: Barbara Partrick (Management and MIS) and Kilty Spoke (Office of the Dean).
From the College of Education and Professional Studies: Deborah Davis (Criminal Justice), Ruth Jenkins (Social Work), and Lenora Motley (Applied Science, Technology and Administration).
From the College of Science, Engineering and Health: Karen Gibbs (Biology), Lisa Kowalski (Mathematics and Statistics, and Phyllis Tranchina (Exercise Science and Community Health).

For comments or information, please contact:
Gabi Grosse (ggrosse@uwf.edu) or Karen Haworth (khaworth@uwf.edu)