



CAMPUS-WIDE STANDARD OPERATING PROCEDURES

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NOTE: *This Standard Operating Procedure Manual will be continuously updated. Notifications will be sent to the campus community as new versions are made available. Please always refer to the version posted on the website to ensure you are following current procedures. If you would like assistance creating a desktop or taskbar shortcut for quick reference, or if you have any suggested additions or edits, please contact Summer Marston at summer.marston@HelenaCollege.edu.*

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1.0 GENERAL INFORMATION

1.1 ID CARDS

Helena College employees need to obtain an ID card from the Welcome Desk on the Donaldson campus. Employees will complete an application and the first ID card is free. (Replacements may result in additional charges.) Contact the Administrative Associate at the Welcome Desk for more information or call x6900.

1.2 AGENCY NUMBER

3514

1.3 COPY CODE

Copiers on campus require a code to operate; contact your supervisor for your area's copy code.

1.4 LOST AND FOUND

Return any lost and found items to the Welcome Center. Purses and wallets are to be taken to the Cashier's Office.

1.5 HELENA COLLEGE POLICIES

Employees are expected to adhere to Helena College policies, which can be found at http://helenacollege.edu/campus_facilities/policiesprocedures/default.aspx

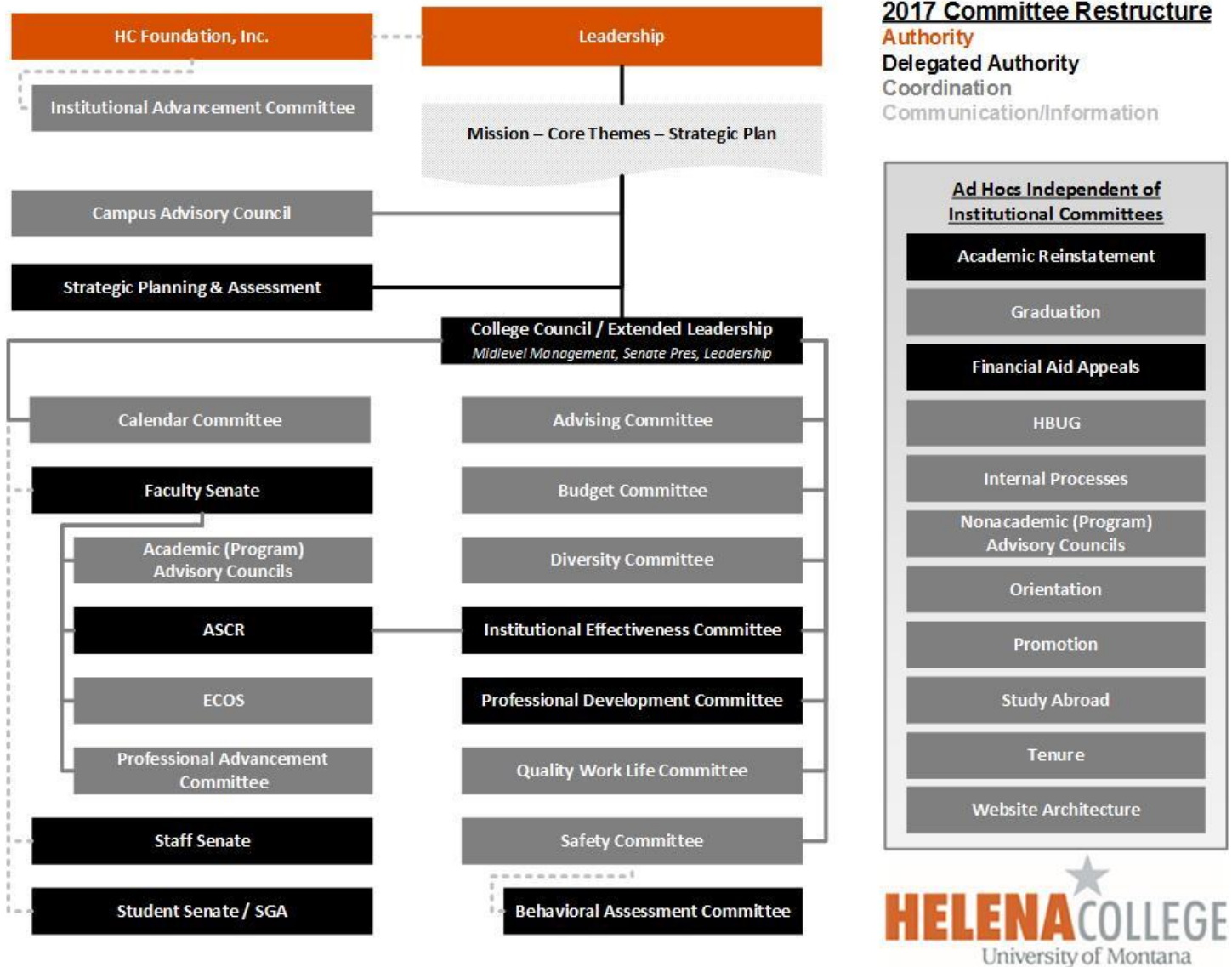
1.6 LEGISLATIVE CONTACT

Montana University System (MUS) employees cannot use public time, money, or other resources to support political candidates, positions, or ballot initiatives. Employees should not communicate directly to Legislators on personal matters using college equipment or during work hours; this also applies to any travel to testify on personal matters.

If contacted by a Legislator or asked to testify before a legislative hearing, please notify the Dean / CEO who will contact the lobbyist representing the MUS and the campuses of the University of Montana (UM).

1.7 INSTITUTIONAL COMMITTEES

Faculty members are required to regularly attend Institutional Committee meetings in accordance with the Collective Bargaining Agreement between the Montana Board of Regents (BOR) of Higher Education and the Helena Teachers' Union, MEA-MFT, NEA, AFT, AFL-CIO, Section 4.11. Staff members are highly recommended to attend these meetings as well.



More information on the committees, members, minutes, and meeting times, please go to http://helenacollege.edu/campus_facilities/committees/default.aspx

1.8 ORGANIZATIONAL CHART

Organization charts for the institution and departments can be found on the Helena College Website at http://www.helenacollege.edu/hr/organization_chart.aspx

2.0 INFORMATION TECHNOLOGY

2.1 WIRELESS NETWORK ACCESS

Helena College employees may gain access to the Staff wireless by selecting:

Network	HelenaCollegeStaff
Security Code	use your HCE number and password to login

Guests may gain access to wireless by selecting:

Network	HelenaCollegeGuest
Security Code	umhguest

2.2 EMAIL

2.2.1 Webmail

Helena College email can be accessed through Outlook Web App by going to <https://messaging.umt.edu/owa/>. This portal may also be found by going to the Helena College web page, clicking on Faculty/Staff, and scrolling down to Outlook Web Access.

Username	helena\ followed by your HCE number (helena\HCExxxxxx)
Password	the password you use to sign onto your work computer

2.2.2 Setting up HC Email for iPhone or Android

1. From the Applications menu, select **Settings, Accounts, and Add account**
2. From the available account types to add select **Corporate Sync** or **Exchange ActiveSync** depending on your android version.
3. Populate the requested fields as follows:
 - Email Address: **first.last@HelenaCollege.edu**
 - Password: **{password that you use to access your NetID account}**
 - Domain: **{helena}**
 - Username: **{Net ID}**
4. Tap **Next**. Your phone will try and fail to find the server. When prompted for the server name enter the following:
 - Server: **messaging.umt.edu**
5. Tap **Next**. As soon as your phone verifies the server settings, the Account Options screen displays. The options available depend on the version of Android on your device. The options may include the following:
 - Email checking frequency – The default value is Automatic (push). When you select this option, email messages will be sent to your phone as they arrive. We recommend only selecting this option if you have an unlimited data plan.
 - Amount to synchronize – This is the amount of mail you want to keep on your mobile phone. You can choose from several length options, including One day, Three days, and One week.
 - Notify me when email arrives – If you select this option, your mobile phone will notify you when you receive a new email message.
6. Sync contacts from this account – If you select this option, your contacts will be synchronized between your phone and your account.

7. Select **Next** and then type a name for this account and the name you want displayed when you send e-mail to others. Select **Done** to complete the email setup and start using your account.
 - *Note: You may need to wait ten-to-fifteen minutes after you set up your account before you can send or receive e-mail.*

2.2.3 Directions on how to setup email signature

- Open the file folder icon on your screen
- To the left at the bottom, under **This PC**, locate the **Employee** drive.
- Open the folder named **Helena College logos**
- Click on the .pdf file name **Helena College email signature instructions**

If you need help, please contact the IT department using the **IT Support Request** link from **Section 2.5 IT Support Request**.

2.3 BANNER

Banner is a database that maintains student, alumni, financial and personnel data. Access to the information in the Banner database can vary between departments in accordance with their position and reason to use the data.

2.3.1 Access to Banner

Profiles are given based on position and the access that is needed. To access Banner, contact the Director of Admissions & Records to complete a request form. Supervisor approval is required.

2.4 TELEPHONE

2.4.1 Phone List

The Staff/Faculty Department Phone List is updated regularly by HR and can be found:

- On the Employees drive under **Staff Faculty Dept Phone List**
- <http://www.helenacollege.edu/directory/default.aspx>

2.4.2 Cisco Phone System



- | | | |
|-------------------------------------|-------------------------|-------------------------|
| 1. Phone Screen | 8. Transfer Button | 16. Messages Button |
| 2. Video Camera | 9. Redial Button | 17. Applications Button |
| 3. Lens Cover Button | 10. Keypad | 18. Contacts Button |
| 4. Softkey Buttons | 11. Speakerphone Button | 19. Phone Speaker |
| 5. Navigation Pad and Select Button | 12. Video Mute Button | 20. Line Buttons |
| 6. Conference Button | 13. Mute Button | 21. Handset Rest |
| 7. Hold Button | 14. Headset Button | |
| | 15. Volume Button | |

LED indicators:

- Flashing Amber—Incoming Call
- Solid Green—Your Call
- Flashing Green—Call on Hold
- Solid Red—Line in use by another user
- Flashing Red—Line on hold by another user

Phone Call Instruction

Lift the handset, press the **SPEAKER** button, press a **LINE** button, or press the **CALL** softkey to place the call. You may dial the number before lifting the handset.

- Dial the 4-digit extension for other Helena College phone numbers
- Dial 8 to get an outside line, then the 7- or 10-digit phone number
- Emergency 911 or 8911

Call History/Missed Call

- Select **CALL HISTORY** and **APPLICATIONS** to view the last 150 calls.
- When there are missed calls on the phone, an indicator for missed call info will appear next to the line info. View **CALL HISTORY**, then tab over to **MISSED CALLS** to clear the indicator.

Placing a Call on Hold

- Press the **HOLD** button
- Press **RESUME** softkey to return to a call. If multiple calls are on hold, press line button of desired call.
- If you have two calls on one key, use the navigation bar and highlight call to return to and press **RESUME**.

Transferring a Call

- During a call, press the **TRANSFER** button. This places the call on hold.
- Dial extension number of person you wish to transfer caller to.
- When ringing begins, press **TRANSFER** again, or wait for party to answer then press **TRANSFER**.
- To cancel the transfer, press **END CALL**, then **RESUME** softkey, or extension key where call is held.

Transferring a Call to Voicemail

- Press **DIVERT** softkey while a call is ringing, on hold or active.
- To transfer direct to voicemail, press the **TRANSFER** button, Press ***#**, Dial the **4-digit extension** number, *QUICKLY* press the **TRANSFER** button.

2.4.3 Voicemail

Enrolling/Initializing Voicemail

To access your voicemail, you will first need to initialize/enroll your mailbox (record your name, record a greeting, and change your password). Contact IT Support for your temporary password. Your new password must be 4-15 digits in length.

Accessing Voicemail

- To access voicemail, press the **MESSAGES** button or dial voicemail extension 6996. Enter your password followed by the **#** key when prompted.
- **Press 1**, to listen to new messages
- **Press 2**, to send a message
- **Press 3**, to review old messages
- **Press 4**, for setup options
 - *Press 1*, to change greeting
 - *Press 2*, for message settings
 - *Press 3*, for preferences
 - *Press 4*, for transfer settings
 - *Press 0*, for help
 - *Press **, to exit

- Press *, to exit
- Press 0, for help

Voicemail Tips:

- Limit background noise
- Be unique
- Smile—a smile is a great way to make your greeting have a pleasant tone.
- Rehearse
- Identify yourself and the college
- Update greeting frequently

Voicemail Examples:

- “Hello, this is _____. I’m sorry, I’m not available to take your call. If you will a detailed message, I will get back to you as soon as possible.”
- “This is _____ and I am not available to answer your call right now. You may leave a message after the tone.”

Voicemail Remote Access

- Dial **406-447-6996**.
- When voice mail answers, press * key.
- Enter your **4-digit mailbox ID** (your extension) number followed by the # key.
- Enter your **password** followed by the # key.

2.4.4 Conference Calls

Conference Phone

If a conference phone is needed (Star phone), contact the IT department through the Support Ticket tracking system (see **Section 2.5 IT Support Request**). All employee phones are speaker capable and will work for small groups (2-4); conference phones are needed for larger groups (5-16).

Conferencing – up to 3 callers

- With conferencing, you call everyone and conference together.
- Helena College pays any long-distance charges.
- Can conference on the regular phone.
- Can also be used for internal video conferencing.

MeetMe – up to 16 callers

- The organizer initiates the call (attendees will get a busy signal if the call is not activated).
- Callers pay any long distance charges.
- Do not put the phone on hold or participants will hear on-hold music.

Submit an IT Support Request as per **Section 2.5 IT Support Request** to request MeetMe.

1. Request a MeetMe # and request a conference phone if needed.
2. MeetMe numbers can be used through individual Cisco phones or the (2) Cisco conference phones (IT Department).
3. To initiate a MeetMe conference call:
 - a. Start a new call or lift handset
 - b. Select **MORE**

- c. Select **MEET ME**
- d. Dial the reserved MeetMe # — “Conference” will display
- e. Callers can then conference in dialing that same MeetMe #
- f. The last person to leave the call ends the call

2.5 IT SUPPORT REQUEST

IT utilizes Help Desk Ticket software to better serve Helena College faculty and staff. When you have an IT need/issue, please [Submit a Support Ticket](#) by navigating to the Employee portal on the Helena College website (http://helenacollege.edu/faculty_staff/default.aspx) and scrolling down to Technical Support. This will route the ticket to the appropriate IT support person. The login information is your NetID and Password.

3.0 MAIL

3.1 INCOMING/OUTGOING MAIL

Located in the cashier area. Staff may place state mail in outgoing box in the cashier's office, and there is tray for stamped mail. Mail is delivered/picked up in the morning, official state mail also comes in the afternoon.

3.2 SHIPPING WITH SPECIAL INSTRUCTIONS

3.2.1 Insurance

Package and label as usual. Attach note to the package that states:

Please ship via UPS with \$[insurance amount] insurance and send tracking number to:

Name (First and Last), Title

1115 North Roberts

Helena, MT 59601

Phone

Email address

3.2.2 Certified Mail

Certified Mail is a service the post office can provide. When certified mail is delivered, the sender receives a small slip of paper that provides a positive proof of delivery. The cashier's office will receive this slip and drop it to your mailbox. Please include return information stating **Attn: [name of sender]**.

4.0 HUMAN RESOURCES

4.1 PAYROLL

4.1.1 Timesheets

The payroll calendar can be found at <http://www.helenacollege.edu/hr/forms.aspx> under payroll. Timesheets are specific to bi-weekly or monthly employees.

- Bi-weekly <http://www.helenacollege.edu/hr/docs/BiweeklyTimesheet.xlsx>
- Monthly <http://www.helenacollege.edu/hr/docs/MonthlyTimesheet.xlsx>

Indicate regular hours on the first line and other hours on designated lines. Note any overtime at the bottom.

4.1.2 Overtime/Flex Time

Always obtain supervisor approval prior to working over 40 hours in a week or changing schedules. If they approve your request, note the overtime/flex on your timesheet.

4.1.3 Leave Options

As per UM Human Resources policies:

Holidays	<p>A legal state holiday as provided in 1-1-216, Montana Code Annotated (MCA) with the exception of Columbus Day (second Monday in October) exchange for the day after Thanksgiving (day following the fourth Thursday in November) as provided in BOR Policy 801.5 – Holiday Exchanges:</p> <ul style="list-style-type: none"> • New Year's Day, January 1; • Martin Luther King Jr. Day, the third Monday in January; • Lincoln's and Washington's Birthdays, the third Monday in February; • Memorial Day, the last Monday in May; • Independence Day, July 4; • Labor Day, the first Monday in September; • Veterans' Day, November 11; • Thanksgiving Day, the fourth Thursday in November, and the following Friday (as per BOR Policy 801.5); • Christmas Day, December 25; • State general election day. (Under certain circumstances, the Commissioner of Higher Education may designate specific business days as holidays for all employees of a campus in exchange for the same number of legal holidays enumerated in 1-1-216, MCA, as per BOR Policy 801.5 – Holiday Exchanges.) <p>If any of the holidays fall on a Sunday, the Monday following is a holiday. If any of the holidays fall on a Saturday, the Friday preceding is a holiday.</p>
Annual Leave	<p>A leave of absence with pay for the purpose of rest, relaxation, or personal business at the request of the employee and with the concurrence of the employer as provided in 2-18-601 (19), MCA. An employee must be continuously employed for a six (6) calendar-month period to be eligible to use annual leave credits. Accrual rate depends on position and the number of years of service.</p>
Sick Leave	<p>A leave of absence with pay for a sickness suffered by an employee or his immediate family or for a permanent employee who is eligible for parental leave under the provisions of 2-18-606, MCA. Includes the following conditions: illness, injury, medical disability, maternity/paternity-related absence including prenatal care, birth, miscarriage, abortion, or other medical care for either employee or child; quarantine resulting from exposure to contagious disease; medical, dental, or eye examination or treatment; care of or attendance to an immediate family member or, at the supervisor's discretion, for another person; death or funeral attendance for an immediate family member or, at the supervisor's discretion, for another person. An employee must be continuously employed for a 90 calendar-day period to be eligible to use sick leave credits. Accrual rate depends on position and the number of years of service.</p>

Juror/Witness Leave	A non-student employee summoned as a juror or subpoenaed as a witness in a court or judicial proceeding must elect to receive leave with pay or annual leave, if eligible. If the employee elects leave with pay, juror or witness fees paid to the employee shall be forwarded by the employee to the office of Human Resource Services within three (3) days of receipt. The fees shall be applied against the amount due the employee from the University. If an employee elects to charge witness or juror leave against annual leave, the employee shall retain juror/witness fees paid by the court.
Military Leave	An employee who is a member of the organized militia of this state or who is a member of the organized or unorganized reserve corps or military forces of the United States, and who has been an employee for a period of six (6) continuous months, shall be given leave of absence with pay for a period of time not to exceed fifteen (15) working days in a calendar year for attending regular encampments, training cruises, and similar active duty training programs of the organized militia of the state or the military forces of the United States. Such leave of absence will not be charged against any other leave credit earned by the employee. Military leave shall not be taken for regularly scheduled drills.
Staff Professional Development Leave	A staff member of UM who has served a minimum of five (5) consecutive years of full-time service or its equivalent may apply. Following completion of a leave, the staff member must remain with UM for at least two (2) consecutive years of additional full-time service before becoming eligible to apply for another Staff Professional Development Leave.

4.1.4 Leave Requests

A Leave Request form must be signed by your supervisor and turned into HR at least 5 days in advance of planned leave. Unplanned leave (emergency or sick leave) must be reported to your supervisor immediately. Upon return to work, complete the Leave Request form. Forms can be found at <http://www.helenacollege.edu/hr/docs/LeaveRequestform.PDF>

4.2 PROFESSIONAL DEVELOPMENT

Professional Development is defined as the continuous process of acquiring *new knowledge and skills* that relate to one's profession, job responsibilities, or work environment, regardless of job classification. In order to qualify as a professional development opportunity, the activity has to relate directly to the applicant's position or job classification and/or be of benefit to the applicant's department/program. This may include (but not be limited to):

- Credit/non-credit courses
- Conferences (video/teleconferences)
- Workshops
- Seminars/webinars
- Presentations
- Research (publications)
- Participation in committees/councils
- Higher education

The Director of Human Resources will announce when application windows open and all required forms/documentation. The forms must include a signature from the appropriate supervisor for the department

- Forms must be submitted to the Professional Development Committee for approval
- Must be submitted before published deadline for semester in which the activity will occur
- Applicants will be notified of the status of their application within 10 working days of the deadline

4.3 TUITION WAIVER

4.3.1 Faculty and Staff Tuition Waiver

As per [BOR Policy 940.13 – Tuition Waivers](#), tuition may be waived for University System employees who are employed at least 3/4 time for the entire period of enrollment. Permanent employees employed at least 3/4 time for the entire academic year and reemployed for the following academic year are eligible for a tuition waiver during the intervening summer term.

- Each campus may at its discretion also waive other fees, but in no case may registration and building fees be waived.
- Each campus may adopt regulations to limit the amount of credit an employee or staff member may register for and to control the times at which courses may be taken.

Employee tuition waiver forms are campus-specific. Helena College forms may be found under Tuition Waiver Forms on the <http://www.helenacollege.edu/financialaid/forms.aspx>.

4.3.2 Dependent Partial Tuition Waiver

As per [BOR Policy 940.32 Tuition Waiver for Dependents](#), employees of the Montana University System (MUS) will be eligible for a 50% residential tuition waiver benefit for their dependents to complete a certificate program or obtain a first baccalaureate degree at any unit of the university system. The tuition waiver benefit may not be used to attend law school or obtain a graduate degree and does not apply to non-credit, continuing education, or other self-supporting courses.

- Employees must be employed at least 3/4 time for five or more consecutive years.
- Employees who utilize the faculty and staff tuition waiver are not eligible for a dependent tuition waiver during the same academic term, and only one dependent may utilize the dependent tuition waiver per academic term.
- Employees who utilize the faculty and staff tuition waiver are not eligible for a dependent tuition waiver during the same academic term. Only one dependent may utilize the dependent tuition waiver in an academic term.

Dependent tuition waiver forms are campus-specific. Helena College forms may be found under Tuition Waiver Forms on the <http://www.helenacollege.edu/financialaid/forms.aspx>.

4.4 WORK STUDY

- To request a work study position, a Work Study Request form must be completed and returned to the Financial Aid Specialist/Work Study Coordinator.
 - Request forms are due between May and June of each year, for the upcoming academic year
 - Request forms can be found on the Employee Drive under Work Study/Work Study Requests
- All requests are reviewed by the Work Study Committee. Each request is evaluated; allocations are divided between all approved departments depending on Federal and State Work Study allocations to the institution.
- Once allocations have been determined, the Work Study Coordinator notifies all departments. Positions are then posted to the website, and eligible students submit their application to the supervisor of the position they are interested in.
- Timecards must be signed by the work study student and their supervisor and submitted by the due date specified on the student payroll calendar. Both timecards and the payroll calendar can be found at: <http://helenacollege.edu/hr/forms.aspx>

5.0 PURCHASING

5.1 PURCHASE ORDER

Take completed Purchase Orders to Business Office via the Cashier. The Purchase Order form and Account Code list are available at the bottom of the Employee Purchasing page:

<http://www.helenacollege.edu/businessservices/docs/PurchaseForm.pdf>

- **Date Ordered** – Actual date of purchase.
- **Order Placed on Purchasing Card** – Check Yes or No.
- **Vendor/Payable to**
- **Dept Index:** List the Index (Hxxxx), not the department name.
- **Account Code:** Include the applicable expense account from the Account Code list. See the Business Office if you are unsure which Account Code to use.
- **Item Number:** This can be the actual item number on the order, invoice number, or left blank.
- **Item Description:** Can be grouped according to their expense account. (For example, the purchase includes pens, staplers, tape, and printer ink. The pens, stapler, and tape may all be listed together and described as office supplies as they are all 62241. Printer ink would be on a separate line under account 62282.)
- **Quantity/Unit Cost**
- **Total:** The total of all index/account amounts. The fillable form will autosum.
- **Purchase Approved by:** Signature of authorized budget authority for the index to be charged.
- **Date:** Date signed by signatory.
- **Receipt:** Attach original, itemized receipt.

5.2 OFFICE SUPPLIES

- Faculty/Academic supplies may be obtained through the Administrative Associate for Academics.
- Supplies may be purchased through vendors with signed supervisor approval. For every purchase, a Purchase Order form is required.
- Supplies must be approved as part of the departmental budget by the corresponding department chair/supervisor. A budget modification must be completed and approved for any purchases not already outlined in the department budget.

5.3 BUSINESS ENTERTAINMENT / MEETING EXPENSE / ALCOHOLIC BEVERAGE FORM

Must be attached to a Purchase Order for any business meeting expenses aside from Office Supplies (food, beverages, or favors). All Business Entertainment / Meeting Expense / Alcoholic Beverage forms must be signed by the requestor (purchaser) and a member of Leadership. The Business Entertainment/Meeting Expense/Alcoholic Beverage form is available on the Employee Purchasing page:

<http://www.helenacollege.edu/businessservices/docs/EntertainmentForm051309.xls>

**If alcoholic beverages are being served, you must receive approval from the Dean/CEO prior to the event.*

5.4 PROCARD

ProCards enable simplified departmental purchasing by allowing designated UM employees (cardholders) to make appropriate purchases from vendors for the College through a charge card. All lodging, rental cars, and airfare must be purchased using a ProCard. The application must be submitted 6 weeks prior to departure to allow for processing. ProCards may NOT be used in restaurants or to purchase gifts or gift cards/certificates or for personal expenses. For more guidelines, see <http://helenacollege.edu/businessservices/docs/UM%20Procard.pdf>

5.4.1 To obtain a ProCard

Read the UM ProCard Purchasing Procedure manual, complete the UM ProCard Quiz, apply by completing the UM ProCard application with your department supervisor and submit to the Business Office via the Cashier. All documents can be found on the UM Business Services Procard page at:

<http://www.umt.edu/business-services/Employees/Services/Accounts%20Payable/Procard%20Reports.php>

5.4.2 To make ProCard Purchases:

- Complete a Purchase Order for all ProCard purchases
<http://www.helenacollege.edu/businessservices/docs/PurchaseForm.pdf>
- If you are responsible for completing the purchase order, but you are not the cardholder, please clearly indicate the name of the cardholder under the item description.
- Billing address:
 32 Campus Drive #2304
 Missoula, MT 59801
- Upon receipt of the item, attach the packing slip to the purchase order and original itemized receipt and submit to the Business Office via the Cashier.
- If delivery is not expected within a week of purchase, make and retain a copy of the invoice. Submit the original invoice with a Purchase Order to the Business Office via the Cashier, turning in the copies when the item arrives.

5.4.3 Missing ProCard Receipt

If you do not have a ProCard receipt, complete the ProCard Missing Receipt Declaration form located at <http://www.umt.edu/business-services/docs/ProcardMissing.pdf>. This form is for emergency use only if you are unable to obtain a duplicate receipt. If an individual uses this form twice in a 12-month period, their ProCard will be suspended.

5.5 COSTCO MEMBERSHIP/CREDIT CARD

Obtain the Costco membership card from the cashier. Using your personal membership card is strictly forbidden. Costco purchases are to be paid for using your ProCard. Return the Costco card to the cashier as soon as you return. The purchasing employee is responsible to submit a completed typed Purchase Order form, as well as a Business Entertainment / Meeting Expense / Alcoholic Beverage form (if applicable), for **each** receipt to the Business Office via the Cashier.

5.5.1 Costco Merchandise Returns and Exchanges

If merchandise purchased with the Costco card is not acceptable (incorrect, damaged, defective, etc.), the purchasing employee is responsible for contacting Costco to make arrangements for a return/credit or an exchange.

- If merchandise is returned for credit, the purchaser is responsible for obtaining a credit receipt from Costco and submitting it to the Business Office with a Purchase Order form. Receiving cash, gift cards, or checks to resolve a credit is prohibited.
- If the merchandise is to be exchanged, the purchasing employee is responsible for returning the merchandise to Costco and obtaining the replacement as soon as possible. Documentation showing proper resolution of the exchange is to be sent to the Business Office.

5.6 TRACKING BUDGET BALANCES THROUGH UMDW

The UM Data Warehouse (UMDW) is the application used by Helena College to keep track of budgets and expenditures. Data is pulled nightly from Banner. The data cannot be changed through UMDW. Any adjustments must be done via the Business Office.

5.6.1 To obtain access to UMDW

Contact the Assistant Dean of Fiscal and Plant to obtain access. IT will install UMDW on your computer and place the following icon on your desktop:



You will initially log in with a user ID and password assigned by UM and will reset your password when you sign in the first time. If you log in and receive a message stating you have an expired license or an update is required, contact the IT Department.

5.6.2 Checking Budget Balance

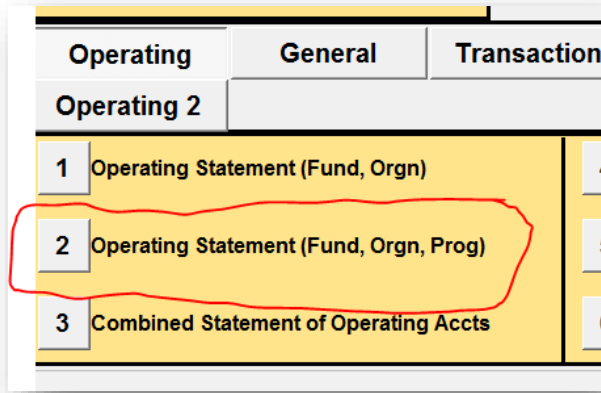
- Open UMDW (employee ID and password)
- Enter your Index in **Enter Chart Elements** next to **Index**

A screenshot of the UMDW application interface. The title bar reads 'Data Warehouse'. Below it, there's a section titled 'Enter Chart Elements'. A red circle highlights the 'Index' field, which contains the value 'H01040'. Other fields like 'Fund' and 'Org' are visible but empty. The 'Chart' dropdown is set to 'C'.

- If you do not want the report to include Payroll information, type **62*** under **Enter Chart Elements** next to **Account**. (Payroll is recorded under Account codes starting with 61, so this will pull other expenditures excluding Payroll.)

A screenshot of the UMDW application interface, similar to the previous one. The 'Enter Chart Elements' section is shown. A red circle highlights the 'Account' field, which contains the value '62*'. Other fields like 'Index' (H01040), 'Fund', 'Org', 'Program', 'Activity', and 'Location' are visible.

- On the **Operating** tab, click **2 Operating Statement (Fund, Orgn, Prog)**



- A report will open showing your balances recorded in UMDW to date (does not include encumbered amounts that have not yet processed).

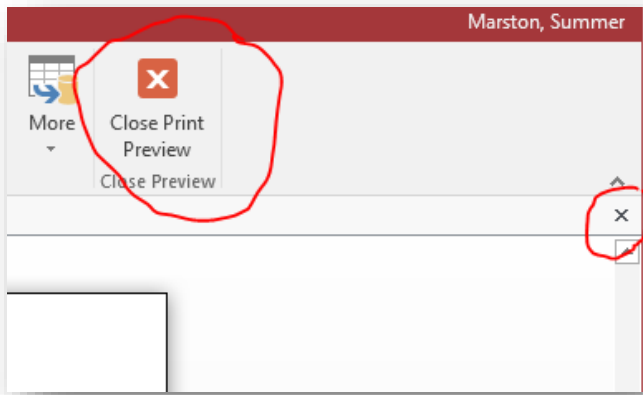
The screenshot shows a report titled "The University of Montana Operating Statement FY17". The report includes the following information:

- Fund:** 411000 **General Operating** **Index:** H01040 **Instructional Support & Supervision**
- Orgn:** 442100 **Instruction Administration**
- Prog:** 04 **Academic Support**

The report is a table with the following columns: **Account Type Levels / Accounts**, **Budget**, **Actual Amount**, **Encumbrances**, and **Available Balance**.

Account Type Levels / Accounts	Budget	Actual Amount	Encumbrances	Available Balance
70 Operating and Capital				
71 Other Services				
62191 Printing	0.00	156.00	0.00	-156.00
Total Other Services:	0.00	156.00	0.00	-156.00
72 Supplies				
62203 Clothing & Personal Supplies	0.00	20.00	0.00	-20.00
62204 Educational Supplies	700.00	0.00	0.00	700.00
62214 Printing Supplies	200.00	0.00	0.00	200.00
62216 Gasoline	0.00	27.96	0.00	-27.96
62225 Books & Reference Materials	200.00	76.05	0.00	123.95

You can close out this report by clicking **Close Print Preview** or clicking the **X** on the right-hand side of the tabs



5.6.3 Detailed Transaction Report

- Enter your index in the **Enter Chart Elements** box (and **62*** in the **Account** box if applicable).
- As before, if you do not want the report to include Payroll information, type **62*** under **Enter Chart Elements** next to **Account**. (Payroll is recorded under Account codes starting with 61, so this will pull other expenditures excluding Payroll.)

Lookup	Enter Chart Elements	Cha
Index	H01040	Inst
Fund		
Org		
Account	62*	
Program		
Activity		
Location		
Chart		

- Click , click on the **Transaction** tab and select **2 O/L – Actual Amounts**

Acct Type

Include Lower Levels? [More](#)

Operating General **Transaction** Payroll

Operating 2

1 O/L - Budget Amounts	4 O/L - Invoice
2 O/L - Actual Amounts	5 O/L - JV Doc
3 O/L - Encumbrance Amounts	6 O/L - All Doc

- This will provide a detailed report that you can use to determine actual expenditures under **Type of Document: Actual** (after that are Budget amounts). If you require more detail that is found in UMDW, please contact the Business Office with the **Transaction** date and **Doc #**.

**The University of Montana
Transaction Listing - Actual Amounts
FY17
H01040**

Fund: 411000 General Operating
Orgn: 442100 Instruction Administration
Prog: 04 Academic Support

Acct	Account Title	Period	Transaction	Doc #	Seq	Actv	RUCL	Transaction Description	Amount Dr	Amount Cr
62191	Printing	02	8/24/2016	JH009832	2		JIC	PS/1825589-Walborn etc bus card	156.00	0.00
Net Amount									\$156.00	0.00
62203	Clothing & Personal Supplies	03	9/7/2016	I1077864	1		INN	Crown Trophy of Helena	20.00	0.00
Net Amount									\$20.00	0.00
62216	Gasoline	02	8/10/2016	I1076158	2		INN	WEX Bank	27.96	0.00
Net Amount									\$27.96	0.00

5.6.4 UMDW Online Training / UMDW Handbook

Further information on using UMDW, including an Online Training and Handbook, is available at <https://winapps.umt.edu/winapps/adminfin/umdw/>

6.0 PARKING

Parking permits are required for all Helena College "Permit Only Parking" areas. Parking Permits are valid for the academic year. Applications for parking permits are found at the Cashier's Office, in the Welcome Center, or on the website at <http://helenacollege.edu/businessservices/forms/ParkPermit.pdf>.

All employees receive one parking permit free of charge annually and may purchase additional permits for the standard \$15 fee. For more questions, contact the Cashier's Office. Temporary parking permits are available to campus visitors by contacting the Welcome Center receptionist.

6.1 HANGING PERMIT REQUIREMENTS

- The hanging permit must be placed on the rear view mirror with permit number facing outward.
- Tag must show all information and easily read from outside the vehicle.

6.2 PARKING REQUIREMENTS

- All vehicles must be registered with hanging permit displayed when parking in designated areas.
- Park in one space, not crossing space lines.
- Do not block driveways or access areas.
- Forward facing parking ONLY; do not back in.
- If you forget your permit, park in non-permit required areas (on the street, not in the interior of the lots).
- Do not park in a hazardous manner.
- Do not park on snowbanks.

Helena College permits do not allow you to park in handicap or reserved parking. Parking in those areas will result in your vehicle being ticketed and/or towed. Parking violations for handicap area could result in a minimum of a \$100.00 fine.

Parking violations in permit parking areas are \$10.00. Vehicle owners are responsible for all accrued charges associated with parking illegally.

7.0 TRAVEL

7.1 TRAVEL PROCEDURES

Travel forms can be found on the Helena College Business Services page under Travel:

<http://helenacollege.edu/businessservices/default.aspx>

7.1.1 Travel Check List

Prior to making travel arrangements:

- Submit a completed Request and Authorization Travel form to the Business Office via the cashier.
- Select the "RAT" tab of the spreadsheet.
- The form must be signed by the employee and their supervisor.
- Include all expense documentation – i.e. Airline tickets, registration fees, hotel estimates, etc.
- If using Professional Development funding, the request must be approved prior to making travel arrangements (See **Section 4.2 Professional Development**).

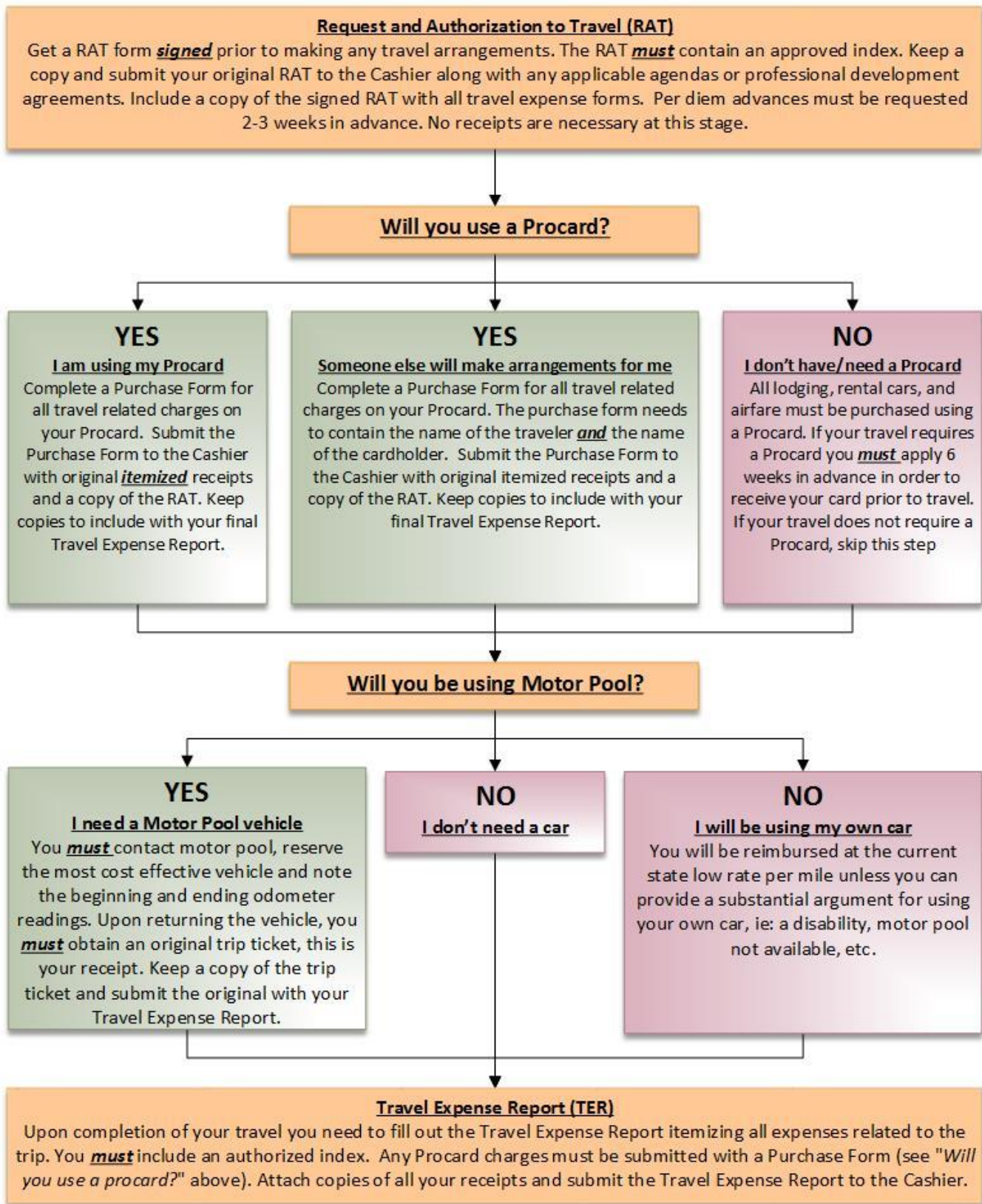
Making travel arrangements:

- You must use a ProCard to purchase:
 - Airline tickets
 - Hotel/Motel rooms
 - Rental cars
- If you do not have a ProCard, you will need to either (a) request one 6 weeks in advance of travel or (b) have someone else make the arrangements for you (See **Section 5.4 ProCard**).
- Reserve a Motor Pool vehicle for all out-of-town car travel (See **Section 7.2 Motor Pool**).
- Make lodging arrangements (if needed):
 - Request the "State Rate" for in-state lodging (hotels may require your employee ID at check-in).
 - For out-of-state travel, room rate guidelines can be found at:
<http://www.gsa.gov/portal/category/21287>
- Book your airline tickets (if needed):
 - Print your flight confirmation receipt and submit to the Business Office via the cashier with a Purchase Order form.
 - Include a copy of your Request and Authorization to Travel form.

Upon return:

- Complete a Travel Expense Report (TER tab of the spreadsheet) listing the actual costs incurred.
- List all ProCard charges Expense tab. For more information about travel guidelines refer to the UM Travel Quick Reference Guide for UM Business Travel:
<http://helenacollege.edu/businessservices/docs/UM%20Travel.pdf>
- Attach all relevant receipts to the form and submit to the Business Office via the cashier.
 - Hotel/Motel itemized receipts
 - Miscellaneous business expenses; i.e. copies, office supplies, etc.
 - Motor Pool vehicle trip receipt
 - Copy of the meeting agenda
 - Per diem for meals being claimed (not available when meals are provided as part of the meeting).
- Any amount owed to the employee will be paid via separate check directly to the employee.

7.1.2 Travel Procedure Flow Chart



7.2 MOTOR POOL

State Motor Pool vehicles are the preferred method of car travel. Personal vehicles may only be used with the prior approval of the employee's supervisor and only when:

- A State Motor Pool vehicle or other State-owned or leased vehicle is not available, or
- The use of a personal vehicle is considered to be in the best interest of the College.

7.2.1 Making Motor Pool Reservations

Motor Pool can be reached by calling **(406) 444-2705** (we do not have access to the MINE site as many state employees do). The first time you call, Motor Pool will request the agency number (3514) to create a "user number" that you will give them when making future arrangements. They will also ask for your email so they can email the Trip Ticket to you after the reservation has been confirmed.

Motor Pool will need the following information to make a reservation:

- Driver name (if making the reservation for someone else)
- Departure Date and Time
- Type of vehicle requested:
 - Class 02 - Small Utilities (Jeep Patriots)
 - Class 03 - Hybrid Small Utilities (Ford Escape)
 - Class 04 - Large Utilities (Ford Expedition)
 - Class 05 - Hybrid Sedans (Toyota Prius)
 - Class 06 - Passenger Cars (Chevy Impala, Ford Fusion)
 - Class 07 - Small Pickups (Ford Ranger, GMC Canyon)
 - Class 11 - Large Pickups (Dodge, including open bed/topper)
 - Class 12 - Vans (6 Passenger mini, 8 or 12 passenger)
- Destination (estimated mileage – distance calculator <http://mdt.mt.gov/travinfo/scripts/citydist.pl>)
- Return date

7.2.2 Motor Pool Authorized Signors

Motor Pool will email a Trip Ticket that must be signed by an authorized signor, preferably the driver's supervisor.

- Dean/CEO
- Associate Dean of Academic Affairs
- Assistant Dean of Student Affairs
- Assistant Dean of Fiscal & Plant
- Division Chair of General Education & Business Technology
- Division Chair of Trades
- Director of Nursing
- Director of Continuing Education
- Director of Marketing
- Director of Human Resources
- Administrative Associate to the Dean/CEO
- Administrative Associate of Academic Affairs

7.2.3 Estimating Cost of Motor Pool Rental for Request and Authorization to Travel Form

Rental rates are available at http://www.mdt.mt.gov/other/webdata/external/maint/mp_rates/rental_rates_new.pdf, as are instructions on computing the estimated rate.

7.2.4 During and After the Trip

The driver must have the signed Motor Pool Trip Ticket and driver's license with them when picking up the car. When returning the Motor Pool vehicle, retain your copy of the trip ticket to submit to the Business Office with your Travel Expense Report, even if you did not have any additional expenses. **Do not use a ProCard for Motor Pool gas.** Use the WEX card that is found in the glove box of each Motor Pool vehicle.

For more information, visit the Motor Pool Information page at:

http://www.mdt.mt.gov/business/wex_fuel.shtml

7.3 STUDENT TRAVEL AND FIELD TRIPS

Student travel is considered college-sponsored if any travel expenses are being covered by Helena College. Helena College will not assume liability or responsibility for participants of any trip that is not college-sponsored. Students taking trips that are not college-sponsored must be informed of that fact in advance. Faculty or staff who violate policy may be subject to disciplinary action, up to and including termination of employment.

All participants in college-sponsored travel must comply with state statute regarding employee travel and Helena College, UM, and BOR policy. The faculty/staff member leading travel should utilize the **Student Travel Procedures Checklist** to ensure such compliance.

Helena College Policy 300.5 Student Travel, the Checklist, and related forms can be found on the Helena College Policies & Procedures web page:

http://helenacollege.edu/campus_facilities/policiesprocedures/default.aspx

- [300.5 - Student Travel](#)
 - [Checklist - Travel Procedures](#)
 - [Appendix 1 - Trip Request](#)
 - [Appendix 2 - Student Agreement to Participate](#)
 - [Appendix 3 - Travel Itinerary](#)

8.0 MAINTENANCE

8.1 CAMPUS HOURS

Official College hours are:

Monday – Thursday	7am-10pm
Friday	7am-6pm
Saturday	8am-4pm (Airport campus closed to the public)
Sunday	Closed to the public

The alarm system is armed outside of these hours.

8.2 DOOR LOCKS

The door locking mechanism on campus provides important security for offices and classrooms. When unlocking the door, turning the key one direction completely unlocks the door, but turning it the other direction unlocks the door to open, but the lock remains active and when the door is closed, it will lock. Many doors are also equipped with a device that can be flipped down when leaving a room to prevent the door from latching.

8.3 MAINTENANCE WORK ORDER REQUESTS

Requests for:

- Emergency (*follow up to call*)
- Replacement
- Room Set Up (*attach schematic*)
- Office/Instructional Equipment or Furniture movement (*5-day notice for scheduling*)
- Safety
- Maintenance

The Work Request form can be found on the Faculty / Staff web page under as **Maintenance Request Form** (http://helenacollege.edu/campus_facilities/docs/HCWorkRequest_FORM.pdf).

To use the form:

- **Save** the form to your computer
- Complete the top half of the form
- Email the form to HCMaintenance@HelenaCollege.edu

NOTE: If you do not save the form before filling it out, it will show up to Maintenance blank.

9.0 MEETINGS

9.1 MEETING ROOMS

All facility reservations are to be scheduled through the Helena College website.

9.1.1 Search for Meeting Room Availability

Go to <http://events.helenacollege.edu/virtualEMS/BrowseForSpace.aspx#> (there is also a link on the Faculty/Staff page of the Helena College website under Meeting Room Availability). Individual credit classes show as blue blocks of time. Hover the mouse over the blue bar to view extra-curricular event details or click in the upper left on "Browse" and selecting "Browse for Events."

9.1.2 Request Meeting Space

Go to <https://apps.helenacollege.edu/machform/view.php?id=76> (or hover over "Links" on the upper left of the Meeting Room Availability page) and choose "Submit Reservation Request" to access the online form. You will need to submit the following information (* indicates required field):

- **Your name***
- **Phone***
- **Email***
- **Meeting event/title***
- **Date of Meeting***
- **Reoccurrence** (If applicable)
- **Start time*** (Building hours are M-Th, 7am-10pm; Fridays, 7am-6pm; Sat, 8a-4pm)
- **Stop time***
- **Number of attendees***
- **Room(s) Requested*** (If no specific room, specify classroom or computer lab)
- **Second choice** (If the first room is not available)
- **Table Arrangement** (If other than a basic classroom, specify U-shape, hollow square, classroom-style, chairs only – always needed for Room 002-003)
- **Technology** All rooms have projectors, please specify if assistance is required or if a conference phone or a laptop is needed.
- **Food/Refreshments*** Specify if there will be refreshments in the room (allowed in the Lecture Hall or downstairs; other rooms may be considered on a case-by-case basis)
- **Request parking passes*** (Specify if attendees will require parking passes; a pdf file which includes a map will be emailed to you to distribute to attendees)

The Dean's Conference Room (102B) can be scheduled by contacting the Administrative Associate to the Dean/CEO.

9.2 REIMBURSEMENT FOR MEETING EXPENSES

9.2.1 Food/Beverage

If refreshments are purchased out of pocket for a meeting, reimbursement can be processed with the original itemized receipt via Business Entertainment/Meeting Expense/Alcoholic Beverage Approval form as directed in **Section 5.3 Business Entertainment / Meeting Expense / Alcoholic Beverage Form**.

9.2.2 Other Meeting Supplies

If non-food items are purchased for a meeting, reimbursement can be processed with the original itemized receipt via the Purchase Order form as directed in **Section 5.0 Purchasing**.

10.0 BRAND STANDARDS

Helena College Brand Standards must be adhered to ensure consistent, professional-looking communications that make for a stronger Helena College brand. Brand standards include usage of the Helena College logo, the name of the institution, official colors, and fonts. The Brand Standards document (HC_brand_standards_JUNE17) can be found in the employee drive under Helena College logos. Contact the Director of Marketing with any questions.

11.0 ACRONYMS

A2S	Access to Success
AAF	Advanced Algebra and Functions
ABE	Adult Basic Education
AE	Adult Education
ALC	Adult Learning Center
ANA	American Nurses Association
ARP	Academic Recovery Program
ASCRC	Academic Standards and Curriculum Review Committee
ASRN	Associate of Science-Registered Nursing
ATI	Assessment Technologies Institute, LLC
BLS	Basic Life Support
BO	Business Office
BON	Board of Nursing
BOR	Board of Regents
CAM	Computer Aided Manufacturing
Cat.	Catalog
CB	Course Bank
CDL	Commercial Driver License
CE	Continuing Education
CMA	Clinical Medical Assistant
CNA	Certified Nursing Assistant
COA	Cost of Attendance
COD	Common Origination Disbursement System
CPS	Central Processing System
CT	Computer Technology
DC	Dual Credit
DE	Dual Enrollment
DL	Direct Loan
DOE	Department of Education
EFC	Expected Family Contribution
EMS	Event Management System
EMT	Emergency Medical Technician
Evals	Course Evaluations
FAFSA	Free Application for Federal Student Aid
FERPA	Family Education Rights and Privacy Act
FSA	Federal Student Aid Identification
FSA ID	Federal Student Aid
Gen. Ed.	General Education
HiSet	High School Equivalency Test
IC	Instructional Council
IFAP	Information for Financial Aid Professionals
IRS	Internal Revenue Service
IRS DRT	IRS Data Retrieval Tool
ISIR	Institutional Student Information Record
LOA	Letter of Assignment
LOO	Letter of Offer

LPN.....	Licensed Practical Nurse
MASFAA.....	Montana Association of Student Financial Aid Administrators
MPN.....	Master Promissory Note
MSDS.....	Material Safety Data Sheet
NASFAA.....	National Association of Student Financial Aid Administrators
NG.....	Next Generation
NIP.....	Nursing Information Page
NSLDS.....	National Student Loan Database System
OBS.....	One Button Studio
OCHE.....	Office of the Commissioner of Higher Education
OPI.....	Office of Public Administration
ORN.....	Orientation
PJ.....	Professional Judgement
PLA.....	Prior Learning Assessment
PN.....	Practical Nurse
PO.....	Purchase Order
QAS.....	Quantitative Reasoning, Algebra and Statistics
R2T4.....	Return of Title IV Funds
RAT.....	Request for Authorization to Travel
RATTER.....	Request for Authorization to Travel and Travel Expense Report
RMASFAA.....	Rocky Mountain Association of Student Financial Aid Administrators
RN.....	Registered Nurse
ROI.....	Release of Information
SAP.....	Satisfactory Academic Progress
SAR.....	Student Aid Report
SEOG.....	Supplemental Educational Opportunity Grant
SI.....	Summer Institute
SOP.....	Standard Operating Procedures
SPA.....	Strategic Planning and Assessment
SSC.....	Student Support Center
TABE.....	Test of Adult Basic Education
TER.....	Travel Expense Report
TRAILS.....	Treasure State Academic Information's and Library Services
TRIO.....	Student Support Services
URM.....	Unified Resource Management System
VUB.....	Veterans Upward Bound Program
WIOA.....	Workforce Innovation and Opportunity Act
WRIT.....	Writing