

CAMPUS-WIDE STANDARD OPERATING PROCEDURES



CAMPUS-WIDE STANDARD OPERATING PROCEDURES

LAST UPDATED SEPTEMBER 8, 2022

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 [Executive Asst. to the Dean/CEO](#).

CONTENTS

1.0	General Information	1
1.1	ID Cards	1
1.2	Agency Number	1
1.3	Copy Code	1
1.4	Lost and Found	1
1.5	Helena College Policies	1
1.6	Legislative Contact	1
1.7	Institutional Committees	1
1.8	Organizational Chart	1
1.9	Supervisor on Call, MUS Compliance Hotline, Report an incident	2
2.0	Information Technology	2
2.1	Wireless Network Access	2
2.2	Email	3
2.4	Telephone	8
2.4.1	Phone List	8
2.4.2	Cisco Phone System	9
2.4.3	Voicemail	10
2.4.4	Conference Calls	11
2.5	IT Support Request	12
3.0	Mail	12
3.1	Incoming/Outgoing Mail	12
3.2	Shipping with Special Instructions	12
3.2.1	Insurance	12
3.2.2	Certified Mail (Forms available in the Executive Assistant to the Dean's Office)	12
4.0	Human Resources	14
4.1	Payroll	14
4.1.1	Timesheets	14
4.1.2	Overtime/Flex Time	14
4.1.3	LEAVE OPTIONS AS PER UM HUMAN RESOURCES POLICIES:	14
4.1.4	Leave Requests	15

4.2 Professional Development	15
4.2.1 Professional Development Committee.....	15
To view the full guidelines, a scoring rubric, and find the link the application (in Vector Solutions).....	16
4.2.2 Recording Professional Development Activities.....	16
4.3 Tuition Waiver	16
4.3.1 Faculty and Staff Tuition Waiver.....	16
4.3.2 Dependent Partial Tuition Waiver.....	16
4.4 Work Study	17
5.0 Purchasing	17
5.1 Purchase Order	17
5.2 Office Supplies	18
5.3 Business Entertainment / Meeting Expense / Alcoholic Beverage Form.....	18
5.4 ProCard.....	18
5.4.1 To obtain a ProCard.....	18
5.4.2 To make ProCard Purchases:	18
5.4.3 Missing ProCard Receipt	19
5.5 Costco Membership/Credit Card	19
5.5.1 Costco Merchandise Returns and Exchanges.....	19
5.6 Tracking Budget Balances through UMDW	19
5.6.1 To obtain access to UMDW.....	19
5.6.2 Checking Budget Balance	20
5.6.3 Detailed Transaction Report	21
5.6.4 UMDW Online Training / UMDW Handbook	22
6.0 Parking.....	22
6.1 Hanging Permit Requirements.....	22
6.2 Parking Requirements	23
7.0 Travel.....	23
7.1 Travel Procedures	23
7.1.1 Travel Check List.....	23
7.2 Motor Pool.....	25
7.2.1 Making Motor Pool Reservations.....	25
7.2.2 Motor Pool Authorized Signors	25

7.2.3 ESTIMATING COST OF MOTOR POOL RENTAL FOR REQUEST AND AUTHORIZATION TO TRAVEL FORM.....	25
7.2.4 DURING AND AFTER THE TRIP	25
7.3 Student Travel and Field Trips.....	26
8.0 Maintenance	26
8.1 Campus Hours	26
8.2 Door Locks.....	26
8.3 Maintenance Work Order Requests.....	27
In case of an emergency call:.....	27
9.0 Meetings	27
9.1 MEETING ROOMS	27
9.1.1 SEARCH FOR MEETING ROOM AVAILABILITY	27
9.1.2 REQUEST MEETING SPACE	27
9.2.1 FOOD/BEVERAGE	30
9.2.2 OTHER MEETING SUPPLIES.....	30
10.0 Brand Standards	31
11.0 Acronyms.....	32

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](#).

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, MFPE, 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.](#)

1.8 ORGANIZATIONAL CHART

Organization charts for the institution and departments can be found on the [Helena College Website](#).

1.9 SUPERVISOR ON CALL, MUS COMPLIANCE HOTLINE, REPORT AN INCIDENT

The **Supervisor on Call** chart can be found in the [HC Main Team](#) file.

The **MUS Compliance Hotline** is published on the [Campus Safety Page](#).

[Report an Incident](#)



The reporting options below provide Helena College community members an opportunity to share important information directly with the appropriate offices. This is an internal reporting tool intended to address concerns in a safe, timely, and supportive manner with the goal of connecting individuals to the resources they need. **In the case of an emergency, always dial 9-1-1 first!**

Choose the report that best matches your concerns. Any reports mistakenly submitted to the incorrect office can be directed to the appropriate office by a Helena College Administrator.

- **Academic Dishonesty**-This report is for faculty use only. Use this report for any incidents involving a violation of academic integrity standards as stated in the Helena College Student Handbook.
- **CARE Referral** - Use this form to refer a student who may be struggling with academic, personal, or emotional difficulties or who may be exhibiting concerning behavior.
- **Early Academic Alert Report** - Use this form to refer a student who may be struggling with academic difficulties, experiencing attendance issues, is in need of a tutor referral or is recommended to drop a course.
- **General Accident/Incident Report**-Use this report for any accidents, or general incidents. (i.e. falls, car accidents, stolen or damaged items, travel incidents, etc.)
- **Sexual Misconduct and/or Discrimination** -Use this form to report any alleged sexual misconduct, discrimination, or harassment. This form may be used to report a student, staff, or faculty, or other employee of the college.
- **Student Conduct Incident Report**-Use this form to report any alleged violations of the Helena College Student Code of Conduct.

Please choose from the following report options:

2.0 INFORMATION TECHNOLOGY

2.1 Wireless Network Access

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

Network SSID: HelenaCollegeStaff

Network Security Key: Use your HCE number and password to login.

Guests may gain access to wireless by selecting:

Network SSID: HelenaCollegeGuest

Network Security Key: hc-guest

Helena College students may gain access to the wireless by selecting:

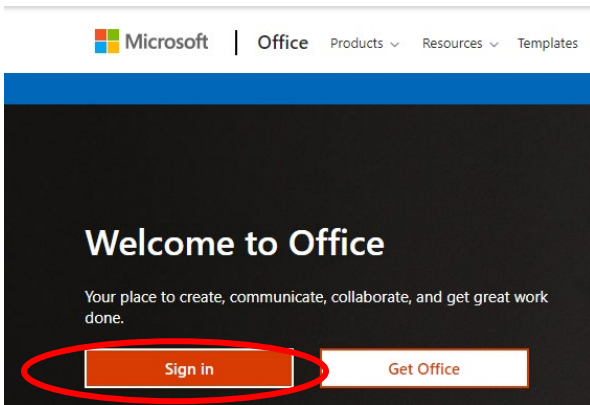
Network SSID: HelenaCollegeStudent

Network Security Key: Use your Student HCS number and password to login.

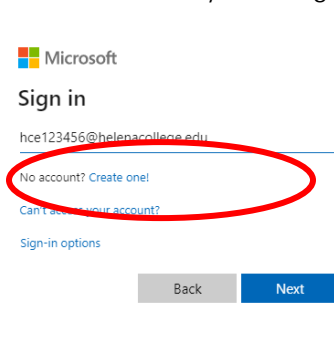
2.2 Email

2.2.1 Online Email


1. Helena College email can be accessed by using a web browser and going to: <http://office.com>. Select Sign in:



2. At the sign in screen, enter your email address in the format of: HCE#####@helenacollege.edu where the HCE#### is your assigned Helena College login number



3. You will be taken to the Helena College Single Sign On page (SSO). The NetID should carry over from the previous screen. If not, re-enter your HCE NetID, and the password that you use to log into your network workstation. Click Sign In.

 For your security, please close your web browser when not in use.

The image shows the Helena College Single Sign On (SSO) page. It has a 'NetID' label above a text input field containing 'HCE123456'. To the right of this field is a link that says 'Look up my NetID'. Below the NetID field is a 'Password' label above a masked password field (represented by dots). At the bottom left, there is a 'Sign In' button with a user icon. At the bottom right, there is a link that says 'I don't know my password'. The entire sign-in area is enclosed in a red rectangular border.

4. It is your choice at the next screen to stay signed in or not.



ed.benasky@helenacollege.edu

Stay signed in?

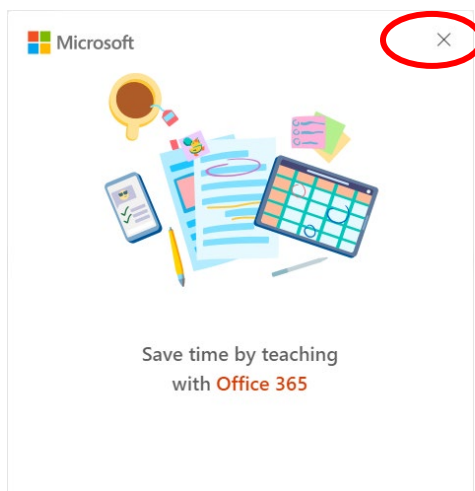
Do this to reduce the number of times you are asked to sign in.

☐ Don't show this again

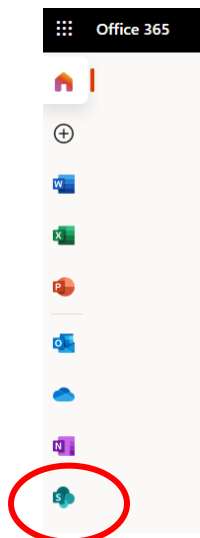
No

Yes

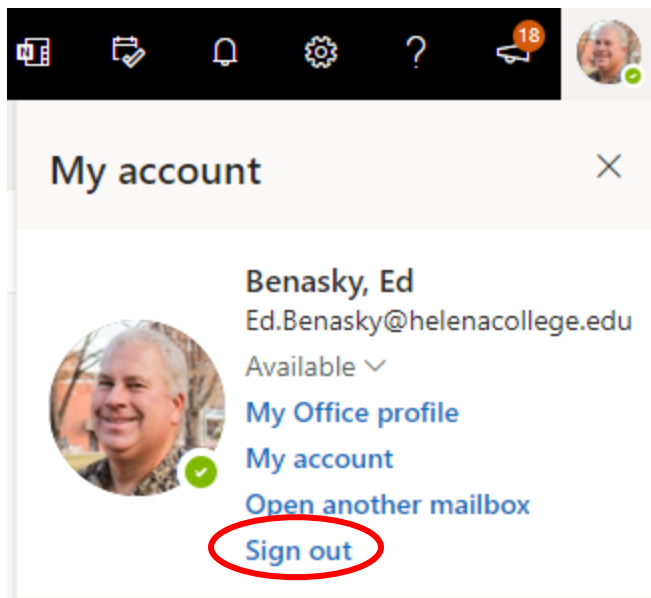
5. There may be various pop ups that open after you sign on. You can select X in the upper right corner to close them if you don't want to read them.





6. Office 365 will open. From the menu on the left select Outlook




7. Your Inbox should now open to allow you to access all your mail.
8. To logout, Click on your picture (or initials) in the upper right corner and select Sign out.



2.2.2 Accessing email on smart device

1. On your device, open either the Play Store or Apple Store and search for "outlook". The one you want to load has the blue O icon .
2. After loading, open the app and go through the welcome screens.
3. Add an account. When prompted, enter your HCE####@helenacollege.edu
4. If you are prompted for the account type, select Office 365 with this  icon:
5. You will be taken to the Helena College login screen. Login with your HCE number and password.




⚠ For your security, please close your web browser when not in use.

NetID

Look up my NetID

Password

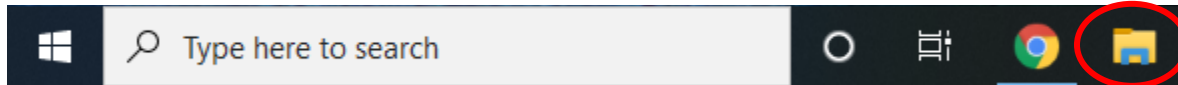
I don't know my password

 Sign In

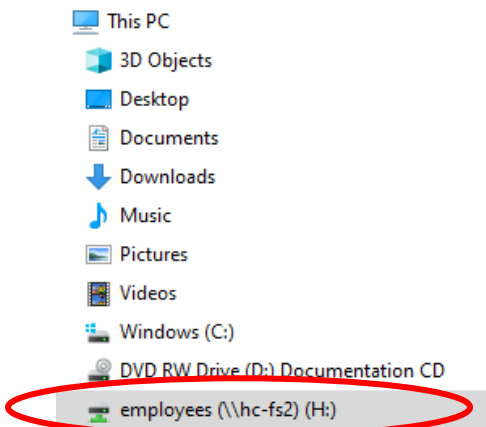
6. There may be more informational screens that you can skip if you wish.
7. Once loaded, your email will show up.

2.2.3 Directions on how to set up email signature using Outlook 2016

1. Select the File Manager at the bottom of the screen.



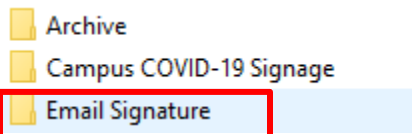
2. On the left side, look for the "Employees" drive:



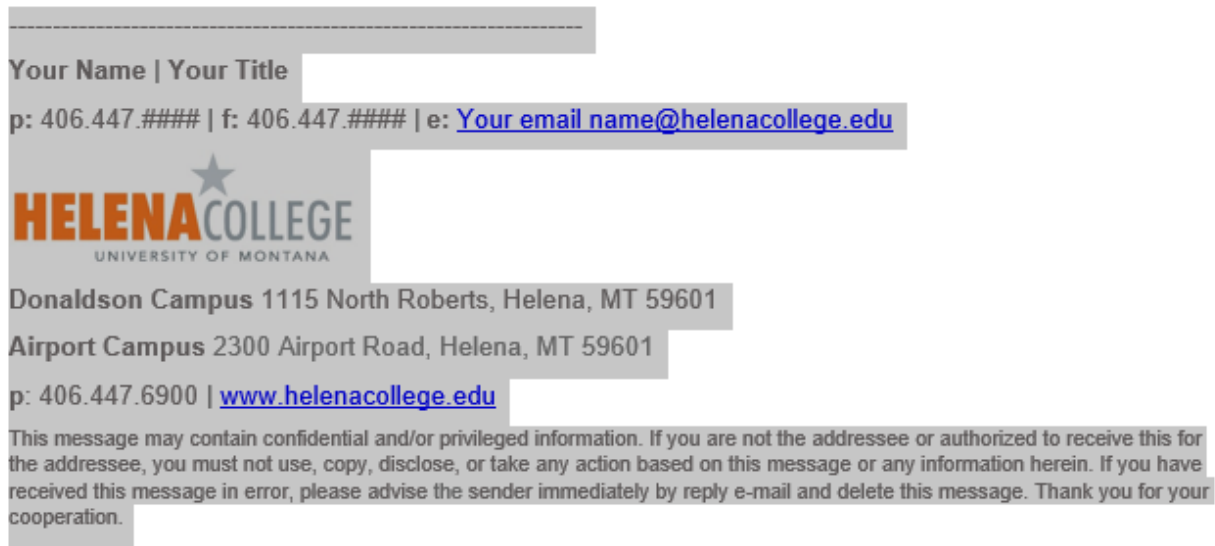
3. On the right side, double click on the folder named "Marketing Materials"



4. Double click to open the folder "Email Signature"



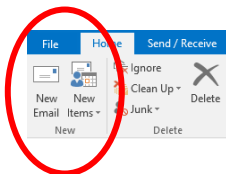
5. Double click on the Word document named "Email Signature Template"
6. Start in the upper left side of the area you need to copy from and then click and hold your mouse button and drag to the bottom right to highlight the signature block. Either enter Ctrl-C to copy this to the "Clipboard".



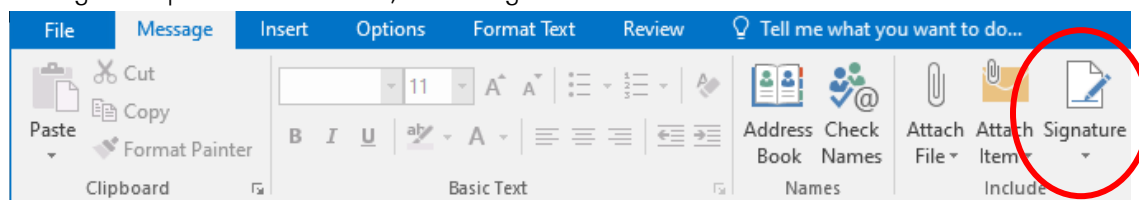
7. Close the Word document.

8. Open Outlook

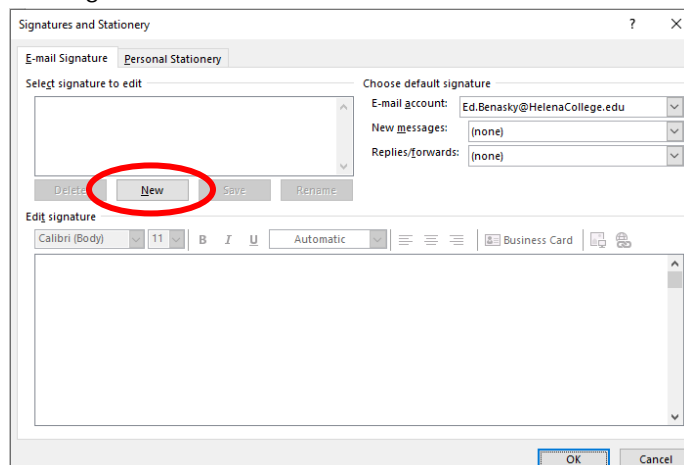
9. Select New Email



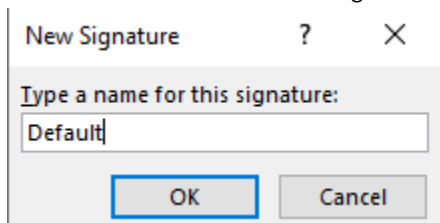
10. Along the top of the menu line, select Signature



11. On the "Pull Down" select Signatures. This will open the Signatures and Stationery. Select New to create a new signature.

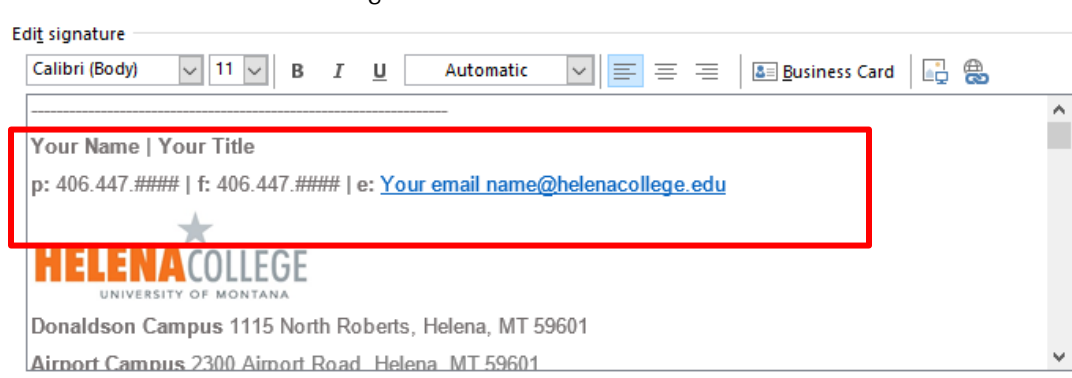


12. Enter a name for the new signature. In this case, I named it “Default” but it can be anything. Select OK

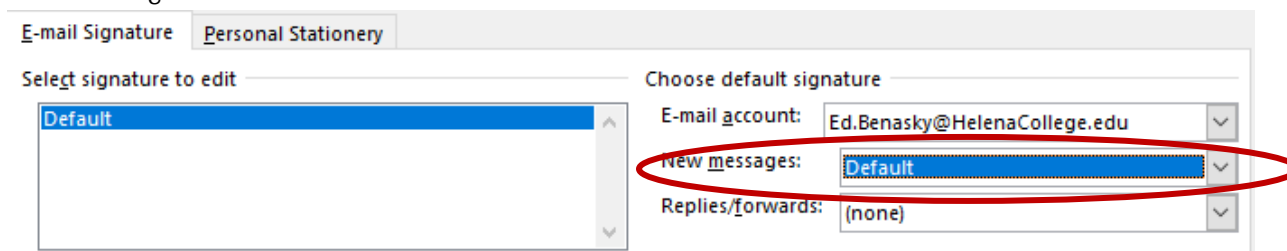


13. On the Signatures and Stationery screen, select the “Edit signature” on the lower part of the screen. Select Ctrl-V to copy the information from the clipboard to this area. If you do not see the information or it is incorrect, you may need to reselect it again per instruction #6.

14. Make the corrections to the signature area as needed.



15. On the upper right side of the Signatures and Stationery, make sure to at least select your signature name for New messages:



16. Select OK to save your signature. Close the blank email that you had opened and do not save it.

17. Open a new email again and your signature will appear at the bottom.

2.4 TELEPHONE

2.4.1 Phone List

The Staff/Faculty Department Phone List is updated regularly by the Dean’s Office and can be found:

- On the Employees drive under [Phone List](#)



- | | | |
|-------------------------------------|-------------------------|-------------------------|
| 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.

2.5 IT SUPPORT REQUEST

IT utilizes Help Desk Ticket software to better serve Helena College faculty and staff.

Email request: <mailto:ITHelp@HelenaCollege.edu>

3.0 MAIL

3.1 INCOMING/OUTGOING MAIL

Located in the cashier area. Staff may drop off state or stamped mail at cashier's office. 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 (Forms available in the Executive Assistant to the Dean's Office)

Two forms are needed:

1. PS Form 3800 (Certified Mail Receipt)
2. PS Form 3811 (Domestic Return Receipt) (two-sided)

Print two small (return address size) labels with the recipient's name and address. Place one on the Form 3800 as follows (it is helpful to write your name on the Form 3800 so the business office knows who it goes to when the receipt is returned from the state Print & Mail service):

U.S. Postal ServiceTM
CERTIFIED MAIL[®] RECEIPT
(Domestic Mail Only; No Insurance Coverage Provided)
For delivery information visit our website at www.usps.com.

OFFICIAL USE

Postage	\$
Certified Fee	
Return Receipt Fee (Endorsement Required)	
Restricted Delivery Fee (Endorsement Required)	
Total Postage & Fees	\$

Postmark
Here

Sent To

[Recipient Name]
[Mailing Address]
[City ST Zip]

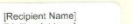
PS Form 3800, August 2006 See Reverse for Instructions

Put the second label in the **Article Addressed to:** box on Form 3811, as follows:

BENEFIT COMPLETE SECTION		CONTINUE THIS SECTION ON ANOTHER PAGE	
<p>1. Complete items 1, 2, and 3.</p> <p>2. Put your name and address on reverse side of form and attach to back of this form.</p> <p>3. Attach the form to the back of the transaction, if you are a group participant.</p> <p>4. Ask your agent.</p>	<p>5. NAME</p> <p>Print name for printed name</p> <p>6. DATE OF BIRTH</p> <p>In member's address of birth (not sex)</p> <p>7. SEX</p> <p>8. DATE OF DEATH</p>	<p>9. TO</p> <p>10. DATE OF DEATH</p> <p>11. DATE OF DEATH</p> <p>12. DATE OF DEATH</p> <p>13. DATE OF DEATH</p> <p>14. DATE OF DEATH</p> <p>15. DATE OF DEATH</p> <p>16. DATE OF DEATH</p> <p>17. DATE OF DEATH</p> <p>18. DATE OF DEATH</p> <p>19. DATE OF DEATH</p> <p>20. DATE OF DEATH</p>	<p>21. DATE OF DEATH</p> <p>22. DATE OF DEATH</p> <p>23. DATE OF DEATH</p> <p>24. DATE OF DEATH</p> <p>25. DATE OF DEATH</p> <p>26. DATE OF DEATH</p> <p>27. DATE OF DEATH</p> <p>28. DATE OF DEATH</p> <p>29. DATE OF DEATH</p> <p>30. DATE OF DEATH</p>

[Recipient Name]
[Mailing Address]
[City ST Zip]




Print an label with the Helena College address (be sure to specify Attn:) for the return receipt and place in the **Sender** box on the opposite side of Form 3811 as follows:

SENDER: COMPLETE THIS SECTION		COMPLETE THIS SECTION ON DELIVERY	
<p>■ Complete forms 1, 2, and 3.</p> <p>■ Print your name and address on the reverse so we can return the card to you.</p> <p>■ Attach a return card to the back of the mailpiece, or on the front if space permits.</p>		<p>A. Signature <input type="checkbox"/> Agent <input type="checkbox"/></p> <p>X <input checked="" type="checkbox"/> Addressee <input type="checkbox"/></p>	
<p>B. Received by (Printed Name) <input type="checkbox"/></p>		<p>C. Date of Delivery <input type="checkbox"/></p>	
<p>1. Address Recipient to:</p> <p>[Recipient Name] [Mailing Address] [City ST Zip]</p>		<p>D. Is delivery address different from item 1? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>E. Will you deliver address otherwise? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	
 9590 0402 0140 8323 5375 13 Actual Net Bar (Encoder for return label)		<p>3. Service Type</p> <p><input type="checkbox"/> Mail Insurance</p> <p><input type="checkbox"/> Priority Mail Express®</p> <p><input type="checkbox"/> Registered Mail Restricted</p> <p><input type="checkbox"/> Certified Mail</p> <p><input type="checkbox"/> Registered Mail Restricted Delivery</p> <p><input type="checkbox"/> Signature Confirmation</p> <p><input type="checkbox"/> Signature Confirmation Restricted Delivery</p> <p><input type="checkbox"/> Signature Confirmation Restricted Delivery</p> <p><input type="checkbox"/> Registered Mail Restricted Delivery</p>	
		<p><input type="checkbox"/> Priority Mail Express®</p> <p><input type="checkbox"/> Registered Mail Restricted</p> <p><input type="checkbox"/> Registered Mail Restricted Delivery</p> <p><input type="checkbox"/> Signature Confirmation</p> <p><input type="checkbox"/> Signature Confirmation Restricted Delivery</p> <p><input type="checkbox"/> Signature Confirmation Restricted Delivery</p>	
		<p>Domestic Return Receipt</p>	

7018 2290 0000 2863 0022

CERTIFIED MAIL

[illegible]

USPS-TRACKING#			First-Class Mail Postage & Fees Paid USPS Permit No. G-10
			
9590 9402 1201 5246 6930 18			
United States Postal Service	* Sender: Please print your name, address, and ZIP+4® in this box*		
	 Helena College Attn: [Your Name] 1115 North Roberts Street Helena MT 59601		

Take the sticker from the top of form 3800 and place it in the **Article Number** box on Form 3811.

Address the envelope with the recipient name and address, insert the letter, seal the envelope. Peel the backing from each end of Form 3811 place the form on the back of the envelope. Peel the backing off the top of Form 3800 and align the dotted white line with the top of the envelope towards the right of the envelope but allowing enough space for postage. Fold the top over the back of the envelope. The certified letter is now ready to mail.

[illegible][illegible]

Once it has been processed at the state mail service, they will stamp Form 3800 and return it to you as a receipt of the mailing. The letter will be delivered to the recipient, and the recipient must sign for the letter. If the recipient signs for it acknowledging receipt of the letter, Form 3811 will be returned to you. If the letter is unable to be delivered with a signature confirmation acknowledging receipt, the entire letter will be returned to you.

4.0 HUMAN RESOURCES

4.1 PAYROLL

4.1.1 Timesheets

The payroll calendar and biweekly timesheets can be found at <http://www.helenacollege.edu/hr/forms.aspx> under payroll. 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,</p>

	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 is approximately 8 hours per month.
--	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

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](#).

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. Departments may include funding for professional development in their budget. College employees also have free access to LinkedIn Learning through the University of Montana. Find the link in the [Professional Development box](#).

4.2.1 Professional Development Committee

The Professional Development Committee also awards funding to administrators faculty, contract professionals, and staff members on an annual basis through a competitive application process.

In order to be eligible for funding, 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 (including video/teleconferences)
- Workshops
- Seminars/webinars
- Presentations
- Research (publications)
- Participation in committees/councils
- Higher education

The Professional Development Committee will announce when applications open and how to apply in the Monday Morning Memo. Applications must be approved by the appropriate supervisor for the area.

To view the full guidelines, a scoring rubric, and find the link the [application \(in Vector Solutions\)](#).

4.2.2 Recording Professional Development Activities

Employees are highly encouraged to keep a record of their training and professional development activities in Vector Solutions. This facilitates individual, departmental, and college-wide tracking of professional development for assessment and planning purposes.

Employees are sent instructions to log into Vector and create their password during their first week of employment. Link: [Vector Solutions, along with instructions for using the platform](#).

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 <https://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 <https://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: <https://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.

- **Date Ordered** – Actual date of purchase.
- Order Placed on Purchasing Card – Check Yes or No.
- Vendor/Payable to
- **Dept. Index:** List the Index (Hxxxxx), 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 auto sum.
- **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:

*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. Click for more [guidelines](#).

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:

5.4.2 To make ProCard Purchases:

- Complete a [Purchase Order](#) for all ProCard purchases
- 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](#). 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.

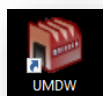
- If merchandise is returned for credit, the purchaser is responsible for obtaining a credit receipt from Costco and submitting it to the Business Office with a Purchase Order form. Receiving cash, gift cards, or checks to resolve a credit is prohibited.
- If the merchandise is to be exchanged, the purchasing 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

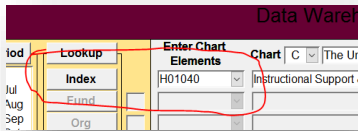
Contact the Assistant Dean Academic Affairs or the Business Office to obtain access. IT will install UMDW on your computer and place the following icon on your desktop:



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.

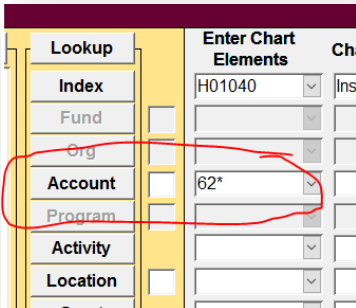
5.6.2 Checking Budget Balance

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



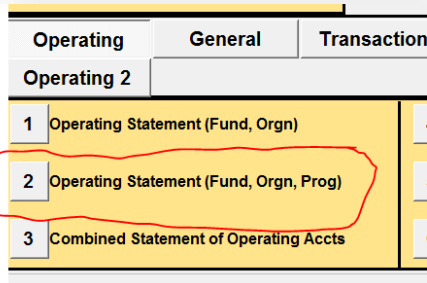
The screenshot shows the 'Data Warehouse' interface with the 'Enter Chart Elements' form. The 'Index' field is highlighted with a red circle and contains the value 'H01040'. Other fields like 'Fund', 'Org', and 'Chart' are also visible.

- 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.)



The screenshot shows the 'Enter Chart Elements' form with the 'Account' field highlighted by a red circle and containing the value '62*'. The 'Index' field contains 'H01040'.

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



The screenshot shows the 'Operating' tab with three options: '1 Operating Statement (Fund, Orgn)', '2 Operating Statement (Fund, Orgn, Prog)', and '3 Combined Statement of Operating Accts'. The '2 Operating Statement (Fund, Orgn, Prog)' option is highlighted with a red circle.

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

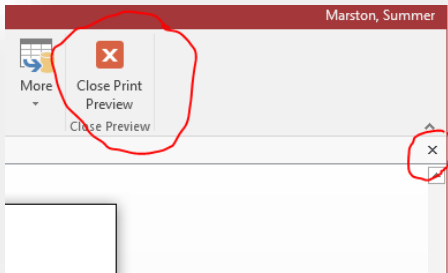
**The University of Montana
Operating Statement
FY17**

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

Index: H01040 Instructional Support & Supervision

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	76.06	0.00	123.94

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

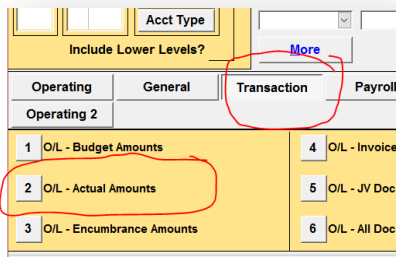


5.6.3 Detailed Transaction Report

- 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	Chart
Index	H01040	Inst
Fund		
Org		
Account	62*	
Program		
Activity		
Location		
Cost		

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



- 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

Acct	Account Title	Period	Transaction	Doc #	Ser	Actv	RUCI	Transaction Description	Amount	Amount	Amount
							JIC		Dr.	Cr.	
62191	Printing	02	8/24/2016	JH009832	2			PS1825589-Walborn etc bus card	156.00		0.00
								Net Amount	\$156.00	156.00	0.00
62203	Clothing & Personal Supplies	03	9/7/2016	11077864	1		INN	Crown Trophy of Helena	20.00		0.00
								Net Amount	\$20.00	20.00	0.00
62216	Gasoline	02	8/19/2016	11076158	2		INN	WEX Bank	27.96		0.00
								Net Amount	\$27.96	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 HC [website](#).

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 or the Executive Assistant to the Dean/CEO.

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](#):

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**).

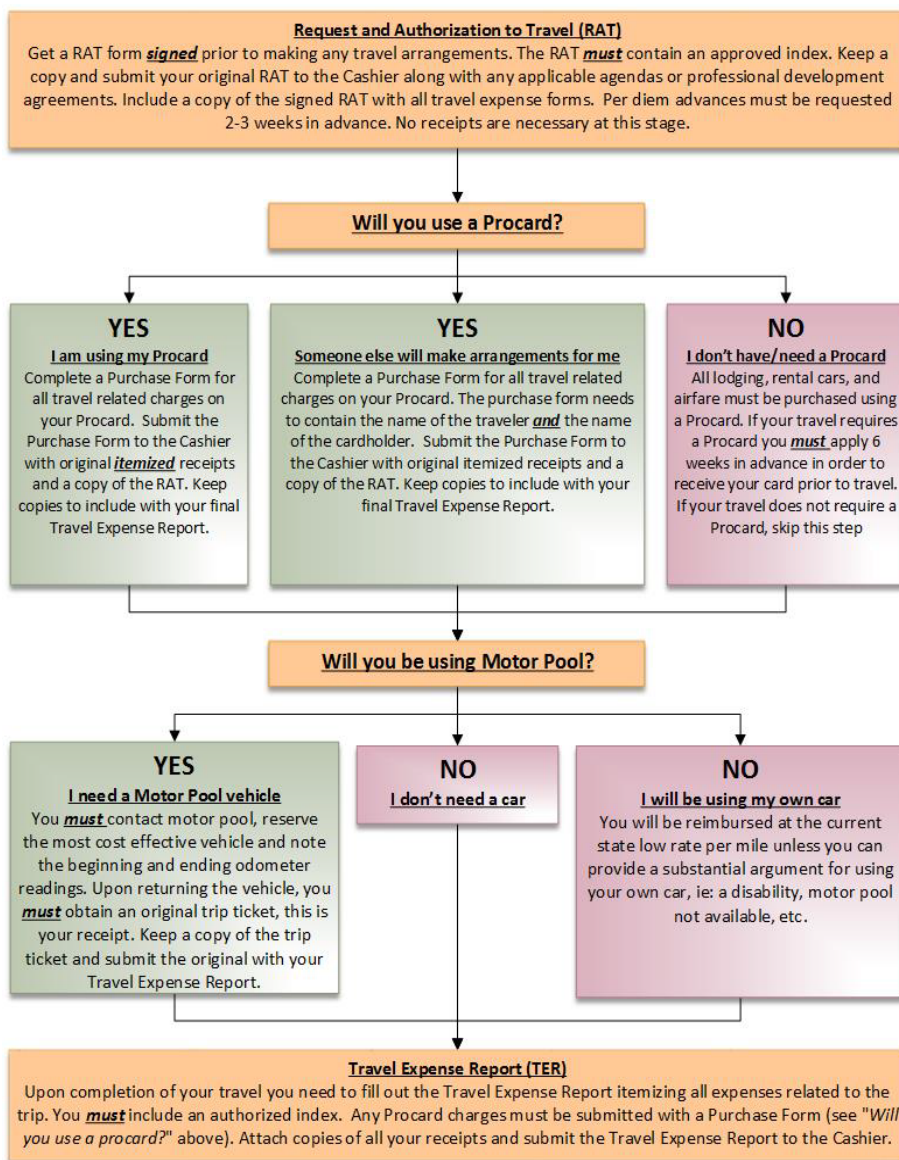
- Reserve a Motor Pool vehicle for all out-of-town car travel (See **Section 7.2 Motor Pool**).
- Make lodging arrangements (if needed):
 - Request the "State Rate" for in-state lodging (hotels may require your employee ID at check-in).

- 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](#)
- 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 04 - Large Utilities (Ford Expedition)
 - Class 05 - Hybrid Sedans (Toyota Prius)
 - Class 06A – Compact (4 Passenger - Chevy Impala, Ford Fusion)
 - 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 signer, preferably the driver's supervisor.

- Dean/CEO
- Assistant Dean of Administrative Affairs (CFO)
- Executive Director of Compliance & Financial Aid
- Executive Director of General Education & Transfer
- Executive Director of Career Technical Education & Dual Enrollment
- Executive Director of Enrollment

7.2.3 ESTIMATING COST OF MOTOR POOL RENTAL FOR REQUEST AND AUTHORIZATION TO TRAVEL FORM

Click [here](#) for the rental rates and 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.

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 are available on the [HC Policy](#) webpage. Turn in all forms to the Academic Desk, DON102P or to the Administrative Associate at the APC front office.

8.0 MAINTENANCE

8.1 CAMPUS HOURS

Donaldson Campus Official College hours are:

Monday – Thursday	7 a.m. - 9:30 p.m. Doors lock at 7:30 p.m.
Friday	7 a.m. - 6 p.m. Doors lock at 5 p.m.
Saturday	8 a.m. - 4:00 p.m.
Sunday	Closed to the public

Airport Campus Official College hours are:

Monday – Friday	6:30 a.m. – 5:30 p.m. The front entrance only. All other exterior doors are locked.
Saturday & Sunday	Closed to the public. Some courses scheduled on Saturdays.

The alarm system is armed outside of these hours. Campus Hours may change over holidays and breaks.

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

Request for daily custodial or maintenance assistance, email HCMaintenance@helenacollege.edu.

IN CASE OF AN EMERGENCY CALL:

In case of an emergency or if you need immediate assistance, please contact:

- John Rutherford, Director of Facilities & Maintenance: 406-475-4931
- Tommi Haikka, Asst. Director of Facilities & Maintenance: 406-594-3419

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 <https://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

You may schedule your meeting through the EMS portal.

You will need a login specific to EMS in order to use the program.

Please contact the Continuing Education office CE@HelenaCollege.edu or 6945 to request an account.

Once you have received your login information, you will navigate to the EMS home screen.

1. From the website [employee portal homepage](#), select the green “Meeting Room Availability” button.
2. At the upper right, click on “Welcome, Guest.”
(NOTE: The system will not currently allow you to book a room with less than 24 hours’ notice. To book a space with short notice, please contact the scheduler in Continuing Education directly.)
3. Once you are logged in, the home screen will display bookings you have scheduled through the application (it will automatically show today’s bookings, but you can select to view by month or to view a particular date.)

4. To begin creating a reservation, click on "CREATE A RESERVATION" on the top left, then choose "book now." Fill in the date and time of your meeting (use the recurrence button if applicable.)
5. Set your Number of Attendees as your first step. This will eliminate rooms from your list that will not accommodate the group size. Once you see an appropriate room on the grid to the right, hit the green plus sign to the left of the room you would like to choose.
6. Scroll to the top of the screen to select the "Next Step" button.
7. Once you have verified the number of attendees and room setup, choose "Next Step" again.
8. Select applicable services option(s). Choose "Next Step" again.
9. Enter the required information about your meeting. Your name is available as a drop-down under 1st Contact, which will autofill your phone and email.
10. Then choose "Create Reservation."

The Meeting is now scheduled and will appear on the calendar as a "waitlist" item. The personnel in scheduling receives a notification email and will update the status to "Confirmed", and will follow up with an email.

Note: if you are curious about an existing reservation in a space, items marked "Private" are courses for academic credit. The system cannot efficiently display the large number of entries in this category. If the item is not private, you can click on the reservation to see the event name and which general department is the host.

If you are interested in viewing a calendar of non-credit events, on the left side of the EMS screen, select Browse – either events (for a calendar listing) or browse locations (for a grid view of rooms.)

Calendar of Non-credit events in our buildings

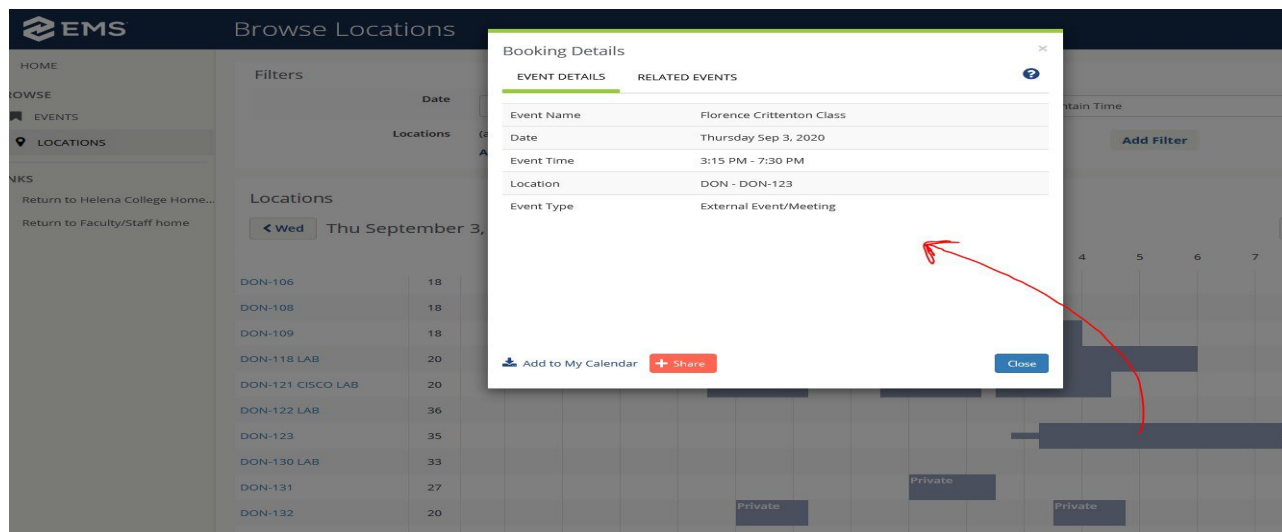
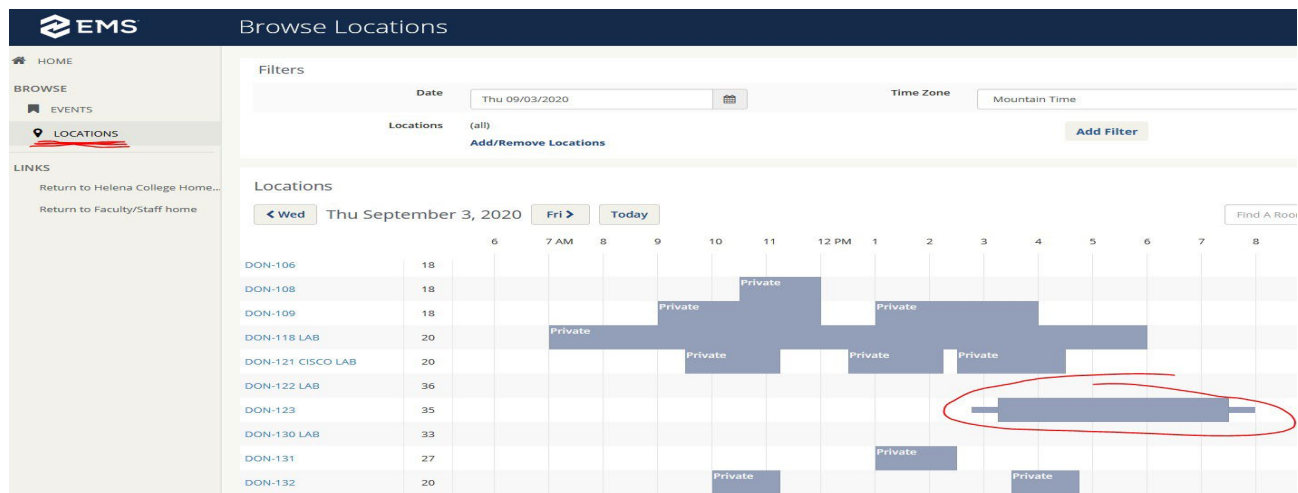
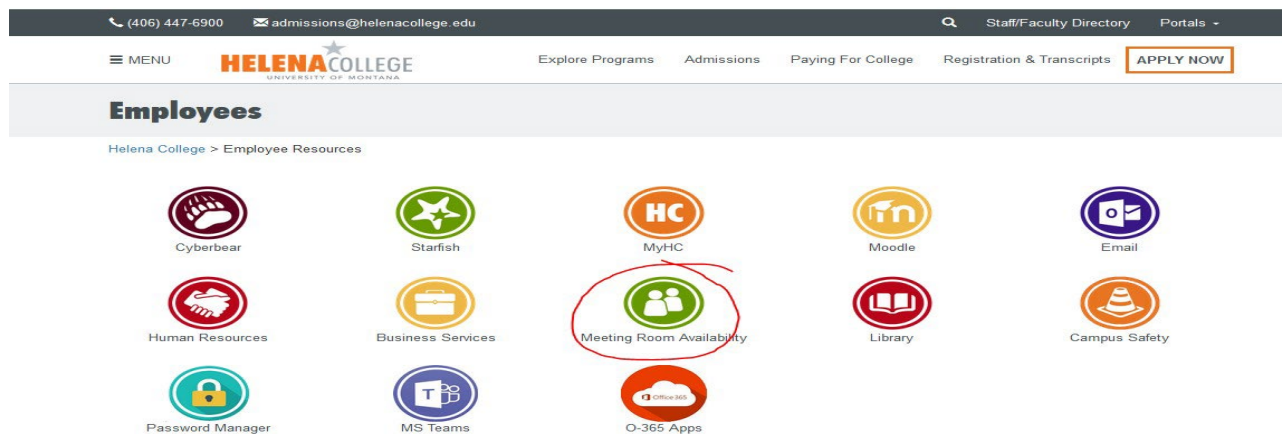
To see event listings for the day or month, go to Meeting Room Availability in the Employee portal.

The default screen is the "Browse by LOCATIONS" screen.

All credit classes are marked "private" so that they do not show up on the calendar page. If they did show here, that page would be sooooo long!

All non-credit events (meetings, CE classes, and special events) do NOT say private. You can click for details - see next image.

Sometimes it would be easier to use the “Browse by EVENTS” screen.



In the “browse by EVENT” or calendar page, MONTHLY LIST is the default. All non-credit class items are listed by time and title. If you click on the item, a booking details screen pops up (similar to the previous illustration.)

The Dean's Conference Room (102B) can be scheduled by contacting the [Executive Assistant](#) 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 and other collateral can be found in the Employee Drive > Marketing Materials Folder. Please note the Helena College logo has been updated to include the University of Montana's sans serif font, image below. Contact the [Director of Marketing & Communication](#) with any questions.



11.0 ACRONYMS

A2S.....	Access to Success
AAFTE	Annual Average Full-Time Equivalent
ABE.....	Adult Basic Education
AE.....	Adult Education
ALC.....	Adult Learning Center
ANA.....	American Nurses Association
APR.....	Academic Program Review
APRC	Academic Program Review Committee
ASCRC	Academic Standards and Curriculum Review Committee
ASRN	Associate of Science-Registered Nursing
ATI.....	Assessment Technologies Institute, LLC
AWP.....	Annual Work Plans
BLS	Basic Life Support
BO.....	Business Office
BON	Board of Nursing
BOR.....	Board of Regents
CAM	Computer Aided Manufacturing
Cat.	Catalog
CCA.....	Complete College America
CCN	Common Course Numbering
CCS.....	Campus Climate Survey
CCSSE	Community College Survey of Student Engagement
CDL	Commercial Driver License
CE	Continuing Education

CEC.....	Community Education Center
CESS.....	College Employee Satisfaction Survey
CMA.....	Clinical Medical Assistant
CNA	Certified Nursing Assistant
CNC.....	CNC Manufacturing
COD.....	Common Origination Disbursement System
CPS.....	Central Processing System
CRM	Customer Relationship Management
CTE.....	Career & Technical Education
DE	Dual Enrollment
DCAC	Dean’s Campus Advisory Council
DL.....	Direct Loan
ECAR	Eligibility & Certification Approval Report
ED	Department of Education
EEA.....	East End Advising
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 & Privacy Act
FISAP	Fiscal Operations Report & Application to Participate
FSA	Federal Student Aid
FSA ID.....	Federal Student Aid Identification
FTE	Full-Time Equivalent
Gen. Ed.....	General Education

HiSet	High School Equivalency Test
HSJP	Helena Area Summer Jobs Program
IC	Instructional Council
IDEA	Institutional Development, Effectiveness, & Accreditation
IPEDS	Integrated Postsecondary Education Data System
IR.....	Institutional Research (& Effectiveness)
IRS	Internal Revenue Service
IRS DRT	IRS Data Retrieval Tool
ISIR	Institutional Student Information Record
IT&P	Information Technology & Programming
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
MT 10	Montana 10
MUS.....	Montana University System
NAPR	Non-Academic Program Review
NASFAA	National Association of Student Financial Aid Administrators
NEH.....	National Endowment for Humanities
NIP	Nursing Information Page
NSLDS.....	National Student Loan Database System
NWCCU.....	Northwest Commission on Colleges & Universities
OCHE.....	Office of the Commissioner of Higher Education
OPI.....	Office of Public Administration

PJ	Professional Judgement
PLA	Prior Learning Assessment
PN	Practical Nurse
PO	Purchase Order
PPA	Program Participation Agreement
R2T4	Return of Title IV Funds
RAT	Request for Authorization to Travel
RATTER	Request for Authorization to Travel and Travel Expense Report
RMAFSA	Rocky Mountain Association of Student Financial Aid Administrators
RN	Registered Nurse
ROI	Release of Information
ROI	Return on Investment (Finance)
SAP	Satisfactory Academic Progress
SAR	Student Aid Report
SBA	Small Business Administration
SBDC	Small Business Development Center
SENSE	Survey of Entering Student Engagement
SEOG	Supplemental Educational Opportunity Grant
SEP	Strategic Enrollment Planning
SI	Summer Institute Training
SOP	Standard Operating Procedures
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

WIOA..... Workforce Innovation and Opportunity Act

WRIT Writing