

**Business Practices Committee Report**

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**THE CHARGE:** This committee was charged with addressing faculty/staff problems associated with the timely establishment and dissolution of index numbers. The committee feels that the following recommendations will remedy 99% of index number associated issues.

**INDEX NUMBER RECOMMENDATIONS:** Recommendations are organized under the headings of Communications, Employment Status, Information Access, Procedures, and Training.

**► Communications:**

The Business and Resource Planning Office (BRP) should develop a system of regular Project Investigator(s) (PI) communications whenever the establishment, use, and/or dissolution of an index number is associated with a PI.

On the Index Establishment Form, the comment section should always be completed by BRP staff as a means of additional communication about the status of index numbers to PI's.

AES funding award letters should indicate when the PI can expect to receive an index number with a copy of the letter sent to the PI's Department Head and Departmental audit/records technician.

BRP staff should write Tip Sheets (Want your index no. w/in three weeks of award? Here's what YOU need to do) and post them online.

Faculty should receive clear communication from BRP staff about how long different types of index numbers (including Hatch funds) take to set-up, the mechanics of restricted account establishment and management, and fiscal year options for maintaining funds.


BRP should provide the department heads and audit/records technicians with a quarterly communication identifying the status of proposal submissions, accounts, budget loads, etc.

**► Employment Status:**

BRP staff should hire at least two additional FTE to handle CES and AES accounting duties.

A Position Description Questionnaire (PDQ) should be completed and sent to Personnel for the entire group of College audit/records technicians to request a group grade increase.

All three Extension District Offices should be permitted to hire a bookkeeper to track index number balances and pay bills in a timely manner.

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► Information Access:

Faculty/staff should be able to easily identify index numbers associated with grants on Banner to access account balances.

BRP should provide faculty/staff with immediate assistance by moving an individual to the office's front desk for the purposes of addressing questions about index numbers and account balances.

► Procedures:

The University should negotiate new terms of use for procurement cards to include travel and utility payments, especially for grant funded projects, and eliminate the Diner's Club card.


The University should explore the implementation of electronic signatures as a means to hasten index number establishment.

BRP staff should regularly grade their own office performance by reflecting on the depth and breadth of their work, the help provided to faculty/staff, and the number of tasks completed in a timely manner.

► Training:

Bookkeeper trainings should be re-instated on a regular and frequent basis.

BRP staff should hold PI required trainings geared at understanding the proposal submission process and index number establishment.

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