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@umhelena.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, report to your supervisor for your area’s copy code.

1.4 LOST AND FOUND
Return any lost items to the Welcome Center. Purses and wallets are to be returned 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://umhelena.edu/campus_facilities/policiesprocedures/default.aspx

1.6 LEGISLATIVE CONTACT
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 Montana University System and the campuses of the University of Montana.

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 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.

Institutional committees include:
- Budget
- Diversity
- Facilities and Safety
- Information Technology
- Institutional Advancement Committee
- Quality Work Life
- Recruitment, Retention and Completion
1.8 **ORGANIZATIONAL CHART**

Organization charts for the institution can be found on the Helena College Website:

[http://www.umhelena.edu/hr/organization_chart.aspx](http://www.umhelena.edu/hr/organization_chart.aspx)
2.0 INFORMATION TECHNOLOGY

2.1 WIRELESS NETWORK ACCESS
Guests may gain access to wireless by selecting:

<table>
<thead>
<tr>
<th>Network</th>
<th>HelenaCollegeGuest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security Code</td>
<td>umhguest</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Username</th>
<th>helena\ followed by your HCE number (helena\HCExxxxxxx)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password</td>
<td>the password you use to sign onto your work computer</td>
</tr>
</tbody>
</table>

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@umhelena.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.
2.3 **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 and 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.umhelena.edu/directory/default.aspx)

2.4.2 **Cisco Phone System**

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

**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
- Call History allows you to view the last 150 calls
- Press the APPLICATIONS button to select CALL HISTORY

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, and the indicator should disappear.

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

Voicemail
- To access voicemail, press the MESSAGES button.
- 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.

2.4.3 Conference Calls

Conference Phone
If a conference phone is needed (Star phone), contact the IT department. 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.
- We pay 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.

Contact IT department it@umhelena.edu 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 ticket from the IT web page. This will route the ticket to the appropriate IT support person. To submit a ticket, go to: http://www.umhelena.edu/it/stafffacfaq.aspx
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.umhelena.edu/hr/forms.aspx under payroll. Timesheets are specific to bi-weekly or monthly employees.
- Bi-weekly http://www.umhelena.edu/hr/docs/BiweeklyTimesheet.xlsx
- Monthly http://www.umhelena.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 University of Montana Human Resources policies:

<table>
<thead>
<tr>
<th>Holidays</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Leave</td>
<td>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.</td>
</tr>
<tr>
<td>Sick Leave</td>
<td>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.</td>
</tr>
</tbody>
</table>
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 the University of Montana 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 the University of Montana 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.umhelena.edu/hr/docs/LeaveRequestform.PDF
4.1.5 Out of Office Notifications

**Sick:** Please call your direct supervisor and the designated person for your area (listed above) as soon as possible. If no answer, leave a voicemail message. That person will send a campus-wide email around 8:30 a.m. indicating who is out of the office (faculty and adjunct faculty notifications will NOT be sent campus-wide).

**Annual/Personal/Professional Leave:** Approved by supervisor in advance. The designated person above will send a campus-wide email on the first day of leave.

**Late:** Please call your direct supervisor (with the exception of faculty and adjunct faculty who MUST contact the Assistant to the Academic Dean so students can be notified)

**Please note:**
- Individual notification to your supervisor is required
- Faculty must email students directly if there are special instructions for the cancelled class
- Faculty are encouraged to email students as soon as they know they will cancel a class
- Please use Outlook out-of-office notifications for annual/personal/professional leave
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 Professional Development Committee requires employees to serve 2 consecutive terms of service (excluding summer) to be eligible for PD.

To apply, complete the Professional Development Request Form *(www.umhelena.edu/hr/docs/ProDev_GrantRequest_HC.docx)* and the Request and Authorization for Travel—RAT form if applicable.

- Completed 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

Be sure to download the form and read the guidelines posted at: [http://www.umhelena.edu/hr/prodev.aspx](http://www.umhelena.edu/hr/prodev.aspx)
4.3 **Tuition Waiver**

4.3.1 **Faculty and Staff Tuition Waiver**

As per Board of Regents Policy 940.13, tuition may be waived for University System employees.

- Employees must be permanent, past the probationary period, and working at least ¾ time.
- 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.
- Complete the required form and return to HR: [http://www.umhelena.edu/financialaid/docs/1516_forms/Helena%20College%20Employee%20Tuition%20Waiver.pdf](http://www.umhelena.edu/financialaid/docs/1516_forms/Helena%20College%20Employee%20Tuition%20Waiver.pdf)

Under federal law, tuition reductions granted to employees in a graduate status are considered as income and are subject to withholding taxes.

4.3.2 **Dependent Partial Tuition Waiver**

As per Board of Regents Policy 940.32, employees of the Montana University System will be eligible for a partial tuition waiver benefit for their dependents.

- The tuition waiver benefit for dependents shall be for 50% of the residential tuition. In no case may registration, course fees or any other mandatory or miscellaneous fees be waived.
- Employees must be permanent, past the probationary period, and working at least ¾ time.
- 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.

Complete the required form and return to HR: [http://umhelena.edu/financialaid/docs/1415_forms/Employee_Deependent_Tuition_Waiver.pdf](http://umhelena.edu/financialaid/docs/1415_forms/Employee_Deependent_Tuition_Waiver.pdf)

Under federal law, tuition reductions granted to employees in a graduate status are considered as income and are subject to withholding taxes.
4.4 **Work Study**

- To hire a work study, a Work Study Request form must be completed and returned to the Scholarship and Work Study Coordinator.
- Request forms can be found on the Employees drive under Work Study\Work Study Requests
- Forms must be completed in advance of the next academic year, and an email will be sent in the spring as a reminder with a closing date of June 1st.
- All requests are reviewed by the Work Study Committee, and hours are divided between departments requesting work study based on allocations from Federal and State programs. Once allocated, job descriptions are posted and students’ applications are sent to the department for hire.
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: http://umhelena.edu/businessservices/purchasing.aspx

- 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, receipt 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 Assistant 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 at: http://umhelena.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://umhelena.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 found 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.umhelena.edu/businessservices/docs/PurchaseForm.pdf
- 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 University of Montana 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:

![UMDW Icon]

You will initially log in with a user ID and password assigned by the University of Montana 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
- 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.)
- On the **Operating** tab, click **2 Operating Statement (Fund, Orgn, Prog)**

![Operating Statement](image)

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

![Operating Statement Report](image)
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.)

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

### 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/](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://umhelena.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 1 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 at [http://umhelena.edu/businessservices/default.aspx](http://umhelena.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 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 5.4 ProCard).
- Reserve a Motor Pool vehicle for all out-of-town car travel (See 7.3 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](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 [http://umhelena.edu/businessservices/docs/UM%20Travel.pdf](http://umhelena.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

Request and Authorization to Travel (RAT)
Get a RAT form signed prior to making any travel arrangements. The RAT must contain an approved index. Keep a copy and submit your original RAT to the Cashier along with any applicable agendas or professional development agreements. Include a copy of the signed RAT with all travel expense forms. Per diem advances must be requested 2-3 weeks in advance. No receipts are necessary at this stage.

Will you use a Procard?

YES
I am using my Procard
Complete a Purchase Form for all travel related charges on your Procard. Submit the Purchase Form to the Cashier with original itemized receipts and a copy of the RAT. Keep copies to include with your final Travel Expense Report.

YES
Someone else will make arrangements for me
Complete a Purchase Form for all travel related charges on your Procard. The purchase form needs to contain the name of the traveler and the name of the cardholder. Submit the Purchase Form to the Cashier with original itemized receipts and a copy of the RAT. Keep copies to include with your final Travel Expense Report.

NO
I don't have/need a Procard
All lodging, rental cars, and airfare must be purchased using a Procard. If your travel requires a Procard you must apply 6 weeks in advance in order to receive your card prior to travel. If your travel does not require a Procard, skip this step.

Will you be using Motor Pool?

YES
I need a Motor Pool vehicle
You must contact motor pool, reserve the most cost effective vehicle and note the beginning and ending odometer readings. Upon returning the vehicle, you must obtain an original trip ticket, this is your receipt. Keep a copy of the trip ticket and submit the original with your Travel Expense Report.

NO
I don't need a car
You will be reimbursed at the current state low rate per mile unless you can provide a substantial argument for using your own car, i.e., a disability, motor pool not available, etc.

NO
I will be using my own car

Travel Expense Report (TER)
Upon completion of your travel you need to fill out the Travel Expense Report itemizing all expenses related to the trip. You must include an authorized index. Any Procard charges must be submitted with a Purchase Form (see "Will you use a procard?" above). Attach copies of all your receipts and submit the Travel Expense Report to the Cashier.
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 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)
- 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:

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, University of Montana, and Board of Regents 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 Policy web page:
http://umhelena.edu/campus_facilities/policiesprocedures/default.aspx

300.5 - Student Travel DRAFT
- 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://umhelena.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 UMHMaintenance@umhelena.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.umhelena.edu/virtualEMS/BrowseForSpace.aspx#](http://events.umhelena.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.umhelena.edu/machform/view.php?id=76](https://apps.umhelena.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 CATERING

9.2.1 Preferred Caterers

Benny’s Bistro
Can do small groups
Menu http://bennysbistro.com/#menu-item-222
To order 443-0105

Chili O’Briens
25 or more only
Menu http://www.chiliobriens.com/?page_id=17
To order 449-2319 or email chiliobriens@gmail.com

Sodexo
Flavours Catering – **10 or more** for Specialty Buffet, **5 or more** for Grab and Go boxed salads/sandwiches
Community Catering – **25 or more** only for Themed Buffet, **10 or more** for EZ Party Packages
Menus https://carrollcatering.catertrax.com/
To order 447-5191

9.3 REIMBURSEMENT FOR MEETING EXPENSES

9.3.1 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 the Purchasing section of this manual.

9.3.2 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 the Purchasing section of this manual.