DASH Institutional Working Group – 05/08/2025 – Minutes

Attendees: Brenda Murrell, Chandra West-Alston, Judi Waldrip, Jonathan Lawshe, George Ninan, Amanda Fryer, Keysha Fuller, Wesley Byerly, and Michael Ebbs

Other Members: Ammar Ammar, Lisa Hall, Benjie Harmon

Meeting notes:

- **Contingent Worker Process Issues:** Wesley explained the challenges with the contingent worker process, particularly for nurse coordinators who need to be listed on IRB protocols. The process requires a full background check and sponsorship by a department, which is cumbersome and costly. Chandra acknowledged the issue and mentioned that Huron and the Oracle team are working on a solution.

  - **Challenges for Coordinators:** Wesley detailed that nurse coordinators need to submit extensive documentation and undergo a full background check to be listed on IRB protocols. This process is cumbersome and costly, especially for those who are full-time employees at other institutions and do not need an appointment at the current institution.

  - **Department Sponsorship:** Wesley explained that nurse coordinators must be sponsored by a department to become contingent workers, which is challenging when they are employed full-time elsewhere. This requirement complicates the process and incurs additional costs for background checks.

  - **Challenges:** Wesley mentioned that the contingent worker process is difficult as they struggle to get people into the system who do not necessarily need to be there. This adds to the complexity and inefficiency to the process.

  - **Solution Development:** Wesley confirmed that a ticket has been created and the issue is being worked on.

- **Planon Data Overwritten:** Amanda updated the team on the delay in training due to Planon data being overwritten during an upgrade. She has been working with the Planon team to rebuild the data and address access issues.

- **Purchasing and Procurement Issues:** Amanda discussed the challenges with purchasing and procurement, including the need to rewrite job aids and retrain staff

due to changes in steps. She also mentioned the upcoming major change in Dash's user interface in August.

- o **Upcoming UI Change:** Amanda informed the team about a major change in Dash's user interface scheduled for August. This change, originally planned for Oracle's 2025a period, has been delayed by the UT system to August and will significantly impact the maintenance and operations side.

- o **Impact on Technicians:** Amanda emphasized that the new user interface will require extensive training for technicians, many of whom are not accustomed to using computers. She requested patience as they prepare for this upgrade over the summer.

- **Security Concerns in Purchasing:** Wesley raised concerns about the open security in purchasing, which allows users to see financials and order items from other accounts. George added that addressing this issue would require a fundamental shift in how security is assigned.

- o **Open Security Issues:** This lack of segregation by roles is a significant worry for faculty.

- o **Fundamental Shift Needed:** George noted that this issue is not just a surface-level tweak but a deeper systemic change.

- o **Faculty Concerns:** Wesley reiterated that the open security is a major concern for faculty, who are uncomfortable with the current level of access. He emphasized the need to keep pushing for a solution despite the challenges.

- **Work Order Charges Bug:** Amanda informed the team about a bug affecting work order charges, which prevents materials purchased from vendors from being billed correctly. She is working on new job aids and retraining staff to address the issue.

- o **Bug Description:** Amanda described a bug that prevents materials purchased from vendors from being billed correctly on work orders. This issue has caused significant disruptions in their processes.

- o **Retraining Staff:** Amanda is working on new job aids and retraining staff to address the issue. She mentioned that Knoxville has also encountered this problem and provided notes on a workaround.

- o **Impact on Invoices:** Jonathan raised concerns about the bug preventing the payment of invoices. Amanda confirmed that this is indeed the issue and that they are working on a solution to ensure accurate billing and payment.

- **Labor Distribution Issues:** Brenda mentioned problems with labor distribution, where expenses are not moving correctly to accounts. She is gathering examples to submit to the Dash team for resolution.

- **401K and 403B Contribution Issues:** Chandra highlighted challenges with 401K and 403B contributions not transferring correctly to Dash. She urged employees to monitor their paychecks to ensure adjustments are reflected accurately.

  - o **Contribution Transfer Issues:** This issue could lead to over or under-contributions, affecting employees' tax filings.

  - o **System-Wide Issue:** Chandra mentioned that this issue is not isolated to their campus but affects the entire system. She plans to communicate this to the system and work on a solution.

- **Procurement Card and Travel Card Charges:** Keysha provided an update on issues with procurement card and travel card charges not posting correctly. The system's IT department is working on a solution.

- **Additional Approvals for Contract Payments:** Judi requested additional approvals for contract payments to ensure accuracy. Keysha and Michael agreed to run the request up the chain and add it to the list of needed changes.

Follow-up tasks:

- **Contingent Worker Process:** Work with the Huron and Oracle teams to develop a solution for the contingent worker process challenges. (Chandra)

- **Planon Data Issue:** Send an email to the facilities teams detailing the new job aids and retraining steps for handling Planon data issues. (Amanda)

- **Purchasing and Procurement Issues:** Send an email to the facilities teams about the new method for adding materials to work orders to ensure accurate billing. (Amanda)

- **Labor Distribution Problems:** Collect examples of labor distribution issues from business contacts and submit them to the Dash team for resolution. (Brenda)

- **Supplementary Retirement Accounts:** Monitor pay slips closely to ensure that adjustments to supplementary retirement accounts are reflected correctly and communicate any discrepancies. (All Employees)

- **Communication on Pay Slip Monitoring:** Draft and send a communication to the campus about the importance of monitoring pay slips for accurate deductions. (Chandra)

- **Procurement Card and Travel Card Charges:** Follow up with the system's IT department to ensure that procurement card and travel card charges are posted correctly. (Keysha)

- **Contract Payment Approvals:** Request the addition of an approval step for contract payments to ensure accuracy before they appear on the ledger. (Judi)