



ASUN Operating Procedure – Workforce Training Billing & Invoicing

Operating Procedure Synopsis

Title: Workforce Training Billing Invoicing

Approval Date:

Revised: n/a

Responsible Officer: Vice Chancellor for Economic & Workforce Development

Responsible Operating Procedure Manager: Vice Chancellor for Economic & Workforce Development

Responsible Department: Economic & Workforce Development

A. Purpose

Arkansas State University Newport seeks to assume a leading role in creating economic and cultural advancement for the communities we serve. A key part of this strategy is to provide opportunities for current and prospective employees of regional business and industry sectors to participate in skill building activities, both professional and technical. Tracking and reporting of these activities is necessary to ensure effective institutional outreach to the institution's business and industry partners.

B. Definitions

Sign-in sheet: Each training activity must have a class / session record, which depicts session name, instructor, date, class duration, and participant names.

Filing / Records / Database: Session records are to be maintained, filed by date, consolidated and summarized in a reporting database.

Client Proposal: Each billable event or training activity is to be framed with a documented proposal. This document may be in email format, and includes key pieces of information: Instructor, Date(s) of activities, client contact person, location of activity, and pricing. This document is to be followed by an agreement to proceed from the client.

Poise: Poise is the platform for records management and reporting for the institution.

C. Scope

All ASUN employees, students, and visitors are expected to adhere to operating procedures. All employees are expected to know and abide by operating procedures. Individuals involved in fulfilling the requirements of this operating procedure include the Administrative Assistant for Economic & Workforce Development and the Vice Chancellor for Economic & Workforce Development. There may be occasions when additional staff may be asked to perform components of this process under the direction of the employees listed above.

D. Statement of Authority

Responsibility for development and enforcement of this operating procedure is the Vice Chancellor for Economic & Workforce Development, and reviewed by the Chancellor and Executive Cabinet.

E. Procedures

Activities completed prior to reporting steps outlined in this procedure:

Workforce Training Activity: These occur throughout the calendar, as needed by business and industry partners or as scheduled for open enrollment classes.

Sign-in Sheet collection and filing: Sign-in Sheets are completed, collected and filed by date, retained in the office of the Administrative Assistant for Economic & Workforce Development.

ASUN Billing / Invoicing Procedure

Step 1. Collect and report all sign-in sheets in accordance with ADHE Reporting Procedures.

Step 2. Complete the ASU Newport Third Party Billing Request Form, provided by the business office

Step 3. Record each data element, as listed on the form, as follows:

Name of customer

Address of customer

Tax ID

Name of contact person

Phone number of contact person

Date billing is to cover

Term billing is to cover

Type of Service to be billed for

Amount to be billed

Complete/final list of students to be billed

Campus contact (person responsible for obtaining any additional information)

Step 4. This document requires the signature of the requestor and date of request.

Signature of person requesting billing

Date

Step 5. Scan and submit this document to Accounts Receivable in the ASU Newport Business Office.

F. Responsible Officer

The Vice Chancellor for Economic & Workforce Development is responsible for oversight of this operating procedure.

G. Related Information

Examples, file names and locations are as follows:

Event sign-in sheets are maintained in files stored in the Economic & Workforce Development filing cabinet that is located in the Administrative Assistant for Workforce & Economic Development's office. Workforce files are sorted and stored by reporting term codes.

Events are entered into POISE and are available to view at any time. They are stored on the Workforce Side of POISE, and accessible with proper log in credentials.

Training activity documents are to be maintained in records files for ASUN reference purposes. They are to be filed in the Workforce Filing cabinet for the term code it is covering.