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## ASUN Operating Procedure – 9001

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### Operating Procedure Synopsis

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**Title:** Workforce Training Billing Invoicing

**Approval Date/Revision Date(s):** 5/2018, 11/2019

**Review Date(s):** 11/2020, 11/2021

**Executive Cabinet Liaison:** Vice Chancellor for Economic & Workforce Development

**Responsible Manager:** Vice Chancellor for Economic & Workforce Development

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### A. Purpose and Scope

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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. Individuals involved in fulfilling the requirements of this operating procedure include the Coordinator of Workforce Training, the Business Office in Newport, 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.

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### B. Definitions

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

**Student Data Form:** In order to stay in compliance with the Arkansas Challenge Lottery Act reporting regulations each participant in a non-credit workforce class / session has to complete a Student Data Form.

**Filing / Records / Database:** Session records are to be maintained, filed by date, consolidated and summarized in a reporting database. Paper copies are also stored in the office of the Coordinator of Workforce Training

**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.

**Access:** Access is the platform for class records management for the institution. (Access will be used for the maintaining of Workforce records until a new database/reporting system is implemented by ASUN)

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\*All ASUN students, faculty, staff and administrators are expected to adhere to operating procedures.

## C. Procedures

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### **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 and Student Information collection and filing:** Sign-in Sheets and Student Data Forms are completed, collected and filed by date, retained in the office of the Coordinator of Workforce Training.

### **ASUN Billing / Invoicing Procedure**

**Step 1.** Collect and report all Sign-in Sheets and Student Data Forms in accordance with ADHE Reporting Procedures.

**Step 2.** Complete an ASU-Newport Third Party Billing Request Form, provided by the business office. (A copy of the form is also saved on the computer of the Coordinator of Workforce Training for quicker access.)

**Step 3.** Provide Customer Data information, listed on the form, as follows:

- Name of customer/company
- Address of customer/company
- Customer/Company Federal Tax ID Number
- 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 (Room Rental/Training/Consulting Work)
- Amount to be billed
- Completed/final list of participants who attended
- ASUN 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.

**Step 6.** A copy of the generated invoice is sent to you for your records.

**Step 7.** Once the invoice is paid a copy of the receipt is sent to you for your records.

**Step 8.** Accounts Receivable will send a 3<sup>rd</sup> Party Billing Excel File with the updated class/billing information for the Department.

**Step 9.** The 3<sup>rd</sup> Party Billing File is used to create the Annual CED (Center for Economic Development) Training spreadsheet. This spreadsheet is kept to help track the split ASU-Newport Portion and ASU Portion of Income earned from the Workforce Training Center.

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## D. Related Information

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Examples, file names and locations are as follows:

Event/Training sign-in sheets and student data forms are maintained in files stored in the Economic & Workforce Development filing cabinet that is located in the Coordinator of Workforce Training's office. Workforce files are sorted and stored by reporting term codes.

Events are entered into Access and are available to view at any time. They are stored on the computer of the Coordinator of Workforce Training, and accessible upon request.