

24.1 Charge Card On-boarding Process Report

March 2018



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TABLE OF CONTENTS

Overview	1
Process Executive Summary	2
Chapter 1: SIPOC Diagram.....	4
Chapter 2: Suppliers	5
Card Services	5
Department Card Manager (DCM)	5
University Department Unit/Department Head/Employee	5
Business Rules	5
Chapter 3: Inputs.....	6
Approvals	6
Charge card training, quiz, and authorization form	6
Request for new/updates to access	6
Business Rules	7
Chapter 4: Process	8
Identify need for new/update access	8
Grant/reject access.....	8
Finalize access	9
Business Rules	9
Chapter 5: Outputs.....	10
Access to system	10
Charge Card issued/cancellation	10
Charge Card Modified.....	10
Response to the requestor	10
Business Rules	10
Chapter 6: Customers.....	11
Department Card Manager (DCM)	11
University Department Unit/Employee.....	11
Card Services	11
Business Rules	11
Chapter 7: Customer - Oversight Roles.....	12
Auditors – Internal and External	12
Board of Trustees	12
Legislature	12
Business Rules	12
Chapter 8: Questionnaire for Current State Analysis	13
Chapter 9: Questionnaire for Potential Process Improvement Candidates.....	15
Chapter 10: Current State Metrics	16
Chapter 11: Feedback from Customer Focus Groups – Current State	17
Chapter 12: Opportunities for Improvements	18
Procurement Services	OBFS
	iii

Chapter 13: Suggested Improvements	19
Chapter 14: Feedback from Customer Focus Groups – Future State	20
Chapter 15: Recommendations for Improvements	21
Chapter 16: Solutions Prioritization Matrix	23
Chapter 1: SIPOC Diagram.....	24
Chapter 18: Future State Requirements	25
Chapter 19: Subject Matter Expert Team	26
Chapter 20: University Focus Group Participants.....	27
Appendix A: Business Glossary	28

Overview

This reports contains the process Charge Card On-boarding. It documents requesting a University charge card to make small purchases while following University policies and procedures.

Illinois Mandate Symbol - 

University Policy Symbol - 

Professional Mandate Symbol - 

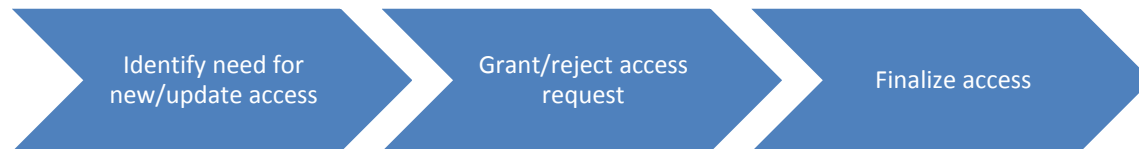
Process Executive Summary

Business Process

The process Charge Card On-boarding is used to request a University charge card. The process begins when a need has been identified for a University charge card or a change is needed to an existing charge card.

When a new University/System employee or an existing employee identifies a need for a University charge card, or an update to their existing charge card, a department head approved request is submitted to the Department Card Manager (DCM) . When an employee requests a University charge card for the first time they must completed the charge card training with a quiz and submit an authorization form. Once the training is completed, the quiz is passed, and the authorization form is completed, this information is provided to the DCM by the employee's manager. The DCM will submit the request to University Payables Card Services area for processing and approval. Updates to a University Charge Card include a new charge card, changes to an existing charge card, and cancellation of an existing charge card.

Current Process Activities



Approach

The current state process activities were mapped by the Subject Matter Expert (SME) and project process team. A SIPOC diagram was created to capture the tasks executed by the University System departments. The SME project team identified opportunities for improvement and brainstormed potential solutions. The current state was presented, issues were identified, and recommendations were discussed at customer focus group meetings in the University System. The process report was presented to the Source2Pay Director Council where they ranked the proposed recommendations for implementation.

Key Findings

- Lacking of understanding how to request a University Charge Card
- Lack of knowing the approved department heads
- Lack of knowing how to determine if there are any outstanding charged transactions prior to cancelling a charge card
- The P-Card software system is an “Old System” and lacks upgrade support

Improvement Recommendations

The process team identified four suggested improvements, and recommended for implementation. The Director Council reviewed the four recommendations and ranked the proposed recommendations for implementation.

Listed are the top four recommendations for implementation:

24.1 Charge Card On-boarding

1. Create a visual workflow to communicate the timeline to approve and grant access to a University Charge Card.
2. Create a project to capture and document the process and procedures for off-boarding an issued University Charge Card.
3. Document the process and procedures for on-boarding and update of access to a University Charge Card.
4. Create a list of Department Head and their chart/org

Chapter 1: SIPOC Diagram

Process Name	Date
24.1 Charge Card On-boarding – Current State	January 2018

SUPPLIERS	INPUTS	PROCESS	OUTPUTS	CUSTOMERS
<u>Who</u> provides input to the process	<u>What</u> goes into the process	<u>How</u> the inputs are transformed to outputs	<u>What</u> comes out of the process	<u>Who</u> received the outputs of the process
Card Services DCM University Department Unit/Department Head/Employee	Approvals Charge card authorization form Charge Card quiz Charge Card training Request for new/update to access	Identify need for new/update access Grant/reject access request Finalize access	Access to a system Response to the requestor Charge card cancelled Charge card issued Charge card modified	Card Services DCM University Department Unit/Employee

Chapter 2: Suppliers

Suppliers provide input to the process:

Card Services

What they care about: Making sure there is a segregation of duties; making sure the charge card information is secure; and proper use of the charge card by following University policies and procedures

When they care: When a request for access is submitted

Department Card Manager (DCM)

What they care about: Getting application access and a charge card for an employees in an acceptable time frame; confirming the department head has approved the request; making sure the charge card information is secure; and proper use of the charge card by following University policies and procedures.

When they care: When the request is submitted

University Department Unit/Department Head/Employee

What they care about: Getting access to do their job and timely reconciliation for charge card purchase(s)

When they care: When they request access, and when they start a new role

Business Rules

Employees must complete Charge Card training and pass the quiz to obtain a charge card.

Chapter 3: Inputs

Inputs are information or verification which goes into the process

Approvals

Charge card training, quiz, and authorization form

Request for new/updates to access

- Name
- Net ID
- P-Card Web Solutions
 - Default CFOAPAL
 - Dollar limit
 - Name of the DCM
 - Name of the reconciler
 - UIN
 - Chart and Org(s)
 - Security information questions (Ex. Mothers maiden name)
- Phone
- TCS
 - Default CFOAPAL
 - Dollar limit
 - Name of the DCM
 - Name of the reconciler
 - Chart and Org(s)
 - Security information questions (e.g. mother's maiden name)
- UIN
- University email address
- Work address

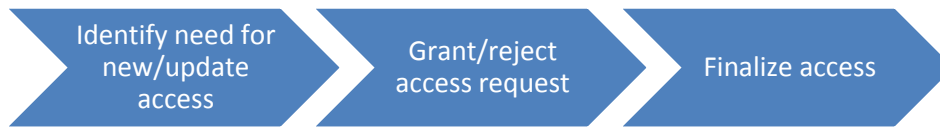
Business Rules

Charge Card

- 30 day cycle limits
- Cycle number transactions
- Daily number of transactions
- Email must be a university email and phone
- Federal grants and contract law(s)
- Illinois procurement law(s)
- Merchant category codes limitations
- Prohibited transaction
- Segregation of duties (card holder cannot be their own approver or reconciler)
- Single transaction dollar limit amount
- University Policies and Procedures
 - Business Purpose

Chapter 4: Process

A process is defined as the method for transforming inputs into outputs:



Identify need for new/update access

When a new University/System employee or an existing employee identifies a need for a University charge card or an update to their existing charge card, a department head approved request is submitted to the Department Card Manager (DCM). The DCM will notify an employee requesting a University charge card for the first time that they must completed the charge card training with a quiz, and submit an authorization form. When the training is completed, the quiz is passed, and the authorization form is completed, this information is provided to the DCM by the employee or employee's manager.

An update to a charge card would include:

- New charge card
- Change to an existing charge card
- Cancellation of an existing charge card

Note: Cardholders also have to do periodic recertification for a P-Card/T-Card. The recertification is conducted biennial for each type of University Charge Card. The P-Card recertification occurs one year and T-Card recertification occurs the next year.

Grant/reject access

When the request is received to the DCM it is reviewed, the information is entered into the PCS/TCS application, and submitted to University Payable's Card Services' department. Card Services will review the following:

- Completeness of the request
- Reason for the request
- Validation of employee and employee's department
- Non-compliant database
- Existing issuance of a University charge card

If Card Services needs additional information or they reject the request, the request is returned to the DCM. A completed and approved request is submitted to the bank for processing by Card Services. The bank will process the request. If the request is a new charge card, the charge card will be issued and sent to a University address.

Finalize access

The employee will receive their charge card either in the mail directly from the bank or from their DCM. The employee will activate the card prior to use. Frequently Card Services runs a report to verify any inactivate charge cards. If an inactivated card is located the employee is contacted to see if the card will be used. If not, the card is requested to be returned to the DCM, who will shred the charge card, and Card Services cancels the charge card with the bank.

Business Rules

Employees must complete Charge Card training and pass the quiz to obtain a charge card.

Chapter 5: Outputs

Outputs are the resulting information or entities that are produced as part of the process:

Access to system

Charge Card issued/cancellation

Charge Card Modified

Response to the requestor

Business Rules

None applicable

Chapter 6: Customers

Customers receive the output of the process.

Department Card Manager (DCM)

What they want: Timely issuance of P-Card and/or T-Card to an employee

University Department Unit/Employee

What they want: Access to Purchasing and Procurement Services' system applications and/or issue of a charge card to allow an employee to perform their job duties

Card Services

What they want: grant access to PCS/TCS applications, profiles set up accurately, and charge cards issued to approved employees

Business Rules

None applicable

Chapter 7: Customer - Oversight Roles

Customers who provide oversight and what oversight is needed: (Example Funders, OBFS, Auditors, Board of Trustees (BOT), Legislature, Public)

Auditors – Internal and External

What they want: Make sure everything is getting setup, segregation of duties

Board of Trustees

What they want: Properly granted access to Systems Security. The Board of Trustees also have contracts with financial institutions and are concerned with Risk mitigation related to card issuance.

Legislature

What they want: compliance with Procurement policies

Business Rules

None applicable

Chapter 8: Questionnaire for Current State Analysis

1. Why does the process exist?

Because people need or require access or changes to systems or receive the benefit of the issuance of a P-Card or a T-Card

Provide a charge card for small purchases, which allow authorized employees the tool to perform their job duties

2. What is the purpose of the process?

Protection of data and access limited to authorized users.

Grant staff access to correct tools to perform their job.

3. What are the process boundaries (i.e., when does it start and end?)

The process starts a need for a charge card has been identified

The process ends when the request has been granted or the request has been denied with a reason provided.

4. What are the major activities/steps in the process?

See [Chapter 4: Process](#) (Ctrl-click to follow link)

5. What is the expected outcome or output of the process?

See [Chapter 5: Outputs](#) (Ctrl-click to follow link)

6. Who uses the output of the process, and why?

See [Chapter 6: Customers](#) (Ctrl-click to follow link)

7. Who benefits from the process, and how?

Employees – ability to make small dollar purchases without pre approval, don't have to wait for reimbursement, approved charge card limits, not having to use personal card

University – controls spending and access to contract info, not having to process invoices and checks for small purchases

8. What information is necessary for the process?

See [Chapter 3: Inputs](#) (Ctrl-click to follow link)

9. Where does that information come from?

See [Chapter 2: Suppliers](#) (Ctrl-click to follow link)

10. What effect does that information have on the process and output?

Information is needed to perform the process and produce the outputs, users are not able to perform their jobs without access.

11. Who is primarily responsible for the process?

- Card services
- DCM

12. What other units/organizations participate in or support the process?

- Auditors (internal and external)
- Bank

24.1 Charge Card On-boarding

13. What Information Technology system(s) support the process?

- Email
- P-Card Web Solutions
- T-Card Solutions

14. What policies guide or constrain the process?

OBFS Business and Financial Policies and Procedures regarding issuance of a Charge Card Chapters:

- 7.6 (The University Purchasing Card (P-Card))
- 8 (Payments and Reimbursements)
- 15 (Travel)
- 18 (Taxes)

Separation of Duties example cannot request system access for self

15. How often does the process get executed?

Charge card requests are received daily

16. What are potential defects with respect to the process?

- Off-boarding is not happening as it should
- Employee off boarding sometimes leaves items in workflows that are no longer assigned to anyone, or still assigned to the person that has left the position
- Manual process to inactivate all access, and no centralized location to know what access exists
- Human error
- P-Card Solutions is not currently supported by anyone other than UI Systems

a. How often do the potential defects occur? Multiple times per day

17. What types of challenges have employees who participate in the process raised?

- How to request the access
- Lack of documentation

18. What types of challenges or concerns have customers raised?

- Lack of understanding of what access should be requested
- How to request the access
- Lack of documentation

19. Will the process be changed by another initiative in the near future?

Potential change to utilize more of the Bank's Card Management System functionality

Chapter 9: Questionnaire for Potential Process Improvement Candidates

1. How would the process operate differently in the “Perfect Situation?”

- Having a one stop shop to request all the access that we need, one website and enter all the info that had workflow to be sent to the proper approvals.
- Would like to have security set up by roles instead of by person or customized roles for USCs to select.
- Automated notification or status of your request at all times

2. What does the team hope to achieve through this improvement?

- Less databases and systems to manage and use
- Time savings, visibility to know status of request, and transparency
- Prevents conflicting roles from occurring
- User friendly – very intuitive, clear instructions and process, and an overview of how it all works
- Prompts or wizards to help the user through the process

3. Who would benefit from the desired improvement to the process?

- Card Services
- DCMS
- University Department Business Managers
- Employees
- University Department

a. How would we know?

Staff would spend less time looking for status, reducing emails, save money by not having to have as many employees doing the work and in the time savings throughout the process. And happier personnel.

4. What data can be provided with respect to the process performance (e.g. service rating, cycle time, customer survey responses, etc.)?

- Processing time/cycle times
- Service desk tickets (start to finish)

5. Who should be included in any improvement discussions for the process?

- Auditors
- Business managers
- Card Services
- DCM

Chapter 10: Current State Metrics

Metrics in three areas is being collected on each process. These metrics will be used to measure success in the future state. [Enter the metrics to each question listed below.]

- How long does the process take from start to finish?
 - Granting access within the P-Card Web System and TCS can take about 10 minutes.
 - The process to issue a charge card can take from two weeks to 30 days.
- How many touchpoints are there per process?

Depending on the type of request the process can have a minimum of four touch points and as many as 18 touch points.
- How many steps are involved in each process?
 - Depending on the type of request the process can have a minimum of 12 steps within the process and as many as 35 steps in the process.

Chapter 11: Feedback from Customer Focus Groups – Current State

The Current State process was presented to each University's Customer Focus Group on Tuesday, January 23, 2018 and Wednesday, January 24, 2018. A total of 5 people attended with one person in attendance from UIC, zero people from UIS, and four people from UIUC.

University Focus Group Summary

At each of the University Focus Group meetings, the attendee were presented with the major process steps and a description of the tasks completed within each of the three main identified steps within the process.

The units follow the process described. One unit receives notification from their HR department when an employee is leaving and will begin the process to cancel the charge card. Issues identified were differences in limit amounts a unit gave a card and the bank had a higher limit on the card.

University Focus Group Report

Current State

- Most of the departments follow the process as described.
- One department unit will received notifications from their internal HR department to the USC and the DCM when an employee has submitted their resignation. The DCM will request the University charge card(s) be turned in for cancellation and begin to monitor the posting of the charged transactions. Once transactions have all posted, the card is cancelled and shredded. When a charge card is cancelled and a transaction tries to post, Card Service needs to assist and release the transaction to post.

Issues

- Not knowing there are outstanding charged transactions prior to cancelling a charge card
- Have the ability to adjust P-Card limit, but not T-Card limit
- Must use a PIN now
- Tried to lower a limit on a card to \$2,500, employee was able to charge a \$4,000 transaction because the bank raised the limit. Would like more option limits to select from beside \$1,500. and \$5,000.

Chapter 12: Opportunities for Improvements

The following opportunities for improvement were identified through team discussions, and feedback provided by University focus groups, and from the Director Council. Issues were categorized into five, covering Communications, Documentation, Policy & Procedures, Technology, and Training. Issues shown in **Bold** are connected to a Recommendation for Improvement in [Chapter 15: Recommendations for Improvements](#)

Communications – Issues related to providing information

C1	Off-boarding isn't happening as it should
C2	Lack of understanding how to request access

Documentation – Issues related to lack of documentation

D1	Lack of knowing approved department head
D2	Lack of understanding how to request access

Policy/Procedures – Issues related to Procurement Policies and Procedures

P1	Off-boarding isn't happening as it should
P2	Not knowing there are outstanding charged transactions prior to cancelling a charge card

Technology – Issues related to system's lack of functionality to support the process

T1	Multiple System for P-Card & T-Card
T2	P-Card is an 'Old' system, and lacks upgrade support
T3	Not knowing there are outstanding charged transactions prior to canceling a charge card
T4	Off-boarding isn't happening as it should
T5	Manual process to inactivate all access

Training – Issues related to lack of understanding the process

TR1	Not knowing there are outstanding charged transactions prior to canceling a charge card
TR2	Lack of understanding how to request access

Chapter 13: Suggested Improvements

The following recommendations came from discussions with the process team members, and/or the Director Council, and/or University System focus groups. Not all improvements were selected by the process team. The selected improvements were presented to the University focus groups for feedback, and are recommended from review by the Director Council. A Suggested Improvement displayed in **bold** is associated with a Recommendation for Improvement, and is further discussed in [Chapter 15: Recommendations for Improvements](#)

Number	Category	Suggested Improvement
1	Communications/ Documentation	Document process and procedures for on-boarding and off-boarding
2	Documentation	List of Department Heads and their chart/org
3	Documentation	Create a visual workflow to communicate the timeline to approve and grant access to a University Charge Card.

Chapter 14: Feedback from Customer Focus Groups – Future State

The Future State process was presented to each University's Customer Focus Group on February 27 & 28, 2018. A total of 6 people attended with 3 people in attendance from UIC, zero people from UIS, and 3 people from UIUC.

Customer Focus Group Summary

At each of the Customer Focus Group meetings the four recommendations for improvement were presented along with the Future System Requirements. Feedback was requested after each presented recommendation. Overall each attendee felt three of the four recommendation would be very helpful. Each group felt the recommendation on the documentation for the process already exists and is on the OBFS website. Each group felt a project to capture off-boarding process would be very helpful.

Customer Focus Group Report

Recommendation feedback:

Create a visual workflow to communicate the timeline to approve and grant access to a University Charge Card.

- Each group felt this recommendation would be helpful, and received a positive response

Document the process and procedures for on-boarding and update of access to a University Charge Card.

- One group felt the documentation for the process already exists on the OBFS website
- Does an OBFS checklist already exist to get a charge card?

Create a project to capture and document the process and procedures for off-boarding an issued University Charge Card.

- Each group supported this recommendation, even though it was out of scope for this process.
- This would be help to determine how to access card transactions for employees who have left the University/Department
- A few departments already have checklist to follow when someone leaves the department

Create a list of Department Head and their chart/org

- This would be helpful to verify that the person approving is legitimate
- Is there a list available through the AMI website?

Chapter 15: Recommendations for Improvements

The recommendations have been identified for improvement. Two different categories were identified for the improvements, and each improvement received a level of implementation. The categories include communication and documentation. There are two levels of implementation: “short-term” indicates improvements suggested for the current system and process prior to the development of an RFP, and “long-term” indicates improvement to the process with an RFP for a new system. The recommendations are in order to make the process better, help the users understand the process, and make sure the process works.

Number	Describe Potential Solutions	Category	Implementation Level	Related Issue(s)
1	<p>Create a visual workflow to communicate the timeline to approve and grant access to a University Charge Card.</p> <p>Create a visual workflow of the steps involved in processing a request for a University Charge Card. The OBFS website is the recommended location to provide the information to University employees.</p> <p>By providing this information to University employees, they will be able to understanding the flow of the work within the process.</p> <p>The working team includes:</p> <ul style="list-style-type: none"> • Department Units • University Payables - Card Services • OBFS – BSS – Communication and Instructional designers 	Communications	Short Term	C2, D2, TR2

Number	Describe Potential Solutions	Category	Implementation Level	Related Issue(s)
2	<p>Document the process and procedures for on-boarding and update of access to a University Charge Card.</p> <p>The documented process will provide the following:</p> <p>Procedures that need to be completed to obtain a University Charge Card.</p> <p>Define who to contact with questions throughout the process.</p> <p>The documentation will be available to the department managers and business managers at each University.</p> <p>The working team on this project involves:</p> <ul style="list-style-type: none"> • University Payables – Card Services • University Department Units 	Documentation	Short Term	C2, D2, TR2

24.1 Charge Card On-boarding

Number	Describe Potential Solutions	Category	Implementation Level	Related Issue(s)
3	<p>Create a project to capture and document the process and procedures for off-boarding an issued University Charge Card.</p> <p>The documentation will be available to the department managers and business managers at each University. The documented process will provide the procedures that need to be completed when an employee leaves a department who has been issued a University Charge Card.</p> <p>The working team on this project involve the following:</p> <ul style="list-style-type: none"> • University Payables – Card Services • University Department Units 	Documentation	Short Term	C1, P1, P2, T3, T4, T5
4	<p>Create a list of Department Head and their chart/org</p> <p>This will allow for Card Services the ability to verify approval on University Charge Card requests applications.</p> <p>The working team members include:</p> <ul style="list-style-type: none"> • AITS – HR TAM • AITS – HR ESC • AITS – System Access Management • University Payables – Card Services 	Documentation	Short Term	D1

Chapter 16: Solutions Prioritization Matrix

The recommendation for improvements were reviewed and the potential solutions were prioritized by the Director Council. The below matrix contains the potential solutions for short term implementation and each ranked score.

Solution Prioritization Matrix: Charge Card On-boarding								
	Describe Potential Solutions	Category	Ease of Implementation:	Permanence of the Solution:	Impact of the Solution:	Cost of the Solution:	Total Score (Average of The total product from each participant):	Ranking
			1 (very difficult) - 5 (very easy)	1 (temporary) - 5 (permanent)	1 (low) - 5 (high)	1 (high) - 5 (low)		
			Avg of attribute from each participant)	Avg of attribute from each participant)	Avg of attribute from each participant)	Avg of attribute from each participant)		
1	Create a visual workflow to communicate the timeline to approve and grant access to a University Charge Card.	Communications	3.38	3	2.25	2.75	84.75	1
2	Document the process and procedures for on-boarding and update of access to a University Charge Card.	Documentation	3	2.75	1.88	3.38	53	3
3	Create a project to capture and document the process and procedures for off-boarding an issued University Charge Card.	Documentation	3.13	2.25	2.63	3	60.13	2
4	Create a list of Department Head and their chart/org	Documentation	2.63	1.123	1.5	3.5	20.63	4
5								

Chapter 1: SIPOC Diagram

Process Name	Date
24.1 Charge Card On-boarding – Future State	March 2018

SUPPLIERS	INPUTS	PROCESS	OUTPUTS	CUSTOMERS
<u>Who</u> provides input to the process	<u>What</u> goes into the process	<u>How</u> the inputs are transformed to outputs	<u>What</u> comes out of the process	<u>Who</u> received the outputs of the process
Card Services DCM University Department Unit/Department Head/Employee	Approvals Charge card authorization form Charge Card quiz Charge Card training Request for new/update to access	Identify need for new/update access Grant/reject access request Finalize access	Access to a system Response to the requestor Charge card cancelled Charge card issued Charge card modified	Card Services DCM University Department Unit/Employee

Chapter 18: Future State Requirements

This is a comprehensive list of functional requirements and technical requirements for the future state of the Charge Card On-boarding process. Excluded from this list are any requirements for functionality outside of the scope of this specific process, such as security, accessibility, etc, which will be handled in a different process.

1. Ability to support multiple types of Charge Cards in one system
2. Ability to have a web based application/agreement form that is sent with the request
3. Ability to have workflow to include the following:
 - a. Ability to see the status of the requested Charge Card
 - b. Ability to receive a type of notification/alert
 - i. Notification/alert include when
 1. Information is incomplete
 2. Information is completed
 3. Application is sent to the bank for processing
 4. When the card is issued

Chapter 19: Subject Matter Expert Team

The following individuals participated on the Subject Matter Expert Team of the BPI System Security Authority/Credit Card On-boarding project:

Name	University/Department	Title
Deborah Caparoon	UIUC/Facilities and Services	Bus/Adminv Assoc
Kevin Fair	UIC/Purchasing	Associate Director
Robert Law	University of Illinois System Office/AITS	Data Security Spec
Hilarie Maloney	University of Illinois System Office/AVP Business & Finance	Coord BSFIN
Kandra Miller	University of Illinois System Office/Payables	Asst Dir Univ Payables
Michael Nevill	University of Illinois System Office/AITS	Asst Dir TAM
Sara Simmons	University of Illinois System Office/AVP Business & Finance	Coord Univ Contract Mgmt Syst
Darren Strater	University of Illinois System Office/Payables	Assoc Dir Support Services

Chapter 20: University Focus Group Participants

The following list of individuals participated in a University Focus Group meeting either during the current state and/or the future state of the BPI System Security Authority and Charge Card On-boarding project.

Name	University
Penny Benner	UIUC
Rene Dunnam	UIUC
Angie Helmuth	UIUC
Denise Lee	UIC
June Luna	UIUC

Appendix A: Business Glossary

Card Services

A department within University Payables that handles Charge Card access

DCM

Department Card manager