# Fiscal Year End Workshop – Refresher

# Check In

You must check in to receive credit in your training history for this course

There are three ways for you to check in

1. Click the link provided in the chat box

2. Scan QR code with your mobile device
   Open the camera on your mobile device
   and hold over QR code

3. Open your browser and type in the web address below
   https://mytraining.utsa.edu/apps/checkin

If you get an alert that you are not enrolled in this class, please email amy.fritz@utsa.edu

# Agenda

- Opening & Welcome
- Budget & Financial Planning
- Payroll
- Accounting
- BREAK
- Purchasing
- Disbursements & Travel Services
  - Credit Card Administration
- People Excellence
- Closing & Questions

# Budget & Financial Planning

Rosanna Brewster, Senior Budget Analyst

# Budget: Funding on Positions Deadline for Corrections

Deadlines based on pay frequency of an employee

| Employee Type | Pay Period Ending | Funding Changes on eForm Must be Submitted and Approved By |
|---|---|---|
| Paid Semi-Monthly | August 15 | Monday, August 15 |
| Paid Semi-Monthly | August 31 | Tuesday, August 23 |
| Paid Monthly | August 31 | Wednesday, August 17 |

Deadline for retroactive funding changes is Tuesday, August 17

# DBT: Department Budget Table

Each fiscal year, the DBT has to be "opened" before any position processing can occur.

FY23 DBT Opens = **Monday, July 18**

(Departments can start processing 9/1/22 eForms)

The initial FY23 position funding record will be loaded as follows:

- If a position was **Permanently Budgeted** in the Hyperion budget process – the same funding source will be loaded into PeopleSoft with a 9/1 effective date.

- If a position **was NOT Permanently Budgeted** in the Hyperion budget process, then the same funding source in PeopleSoft on July 11 will be rolled forward with a 9/1/22 effective date

NOTE: Position Funding changes will **NOT BE PROCESSED** between July 11-18

# DBT: Dual Year Processing

**New Position Request eForms** processed in FY22, on or after July 11

- In order to assign funding to the position in FY23, one of the following eForms must also be created (with an FY23 effective date):
  - ✓ An Appointment eForm
  - ✓ A Funding Change eForm

**Funding changes on eForms** (see list below) processed in FY22, on or after July 11

- In order to continue the same funding source in FY23, a Funding Change eForm effective 9/1/22 should also be processed

Note: Position funding can be changed using the following eForms: Appointment or contract changes/additions, position attribute changes (PACs), job attribute changes (JACs) and transfers.

# DBT: Dual Year Processing – Additional Reviews

**eForms**

For eForms submitted in FY22, but after the FY 2023 DBT is open –

- Early in FY23, Budget Office will send out reports on position funding
- Determine if additional eForms are needed to change position funding

**Budget Transfers**

For budget transfers submitted in FY22, **after Hyperion closed** -

- FY 2022 transfers that you also want reflected in FY23, a second transfer must be processed again in the new fiscal year

- Early in FY 2023, Budget Office will send out a list of permanent budget transfers posted in PeopleSoft after Hyperion closed

# FY22: Ending Balance Report Review

Monthly ending balance reports sent to college and VP financial leads

- Provides year-to-date activity for all funds/cost centers in each college and VP area
- Provides original budget and budget adjustments, expenditures and encumbrances, and budget balance available

**IMPORTANT!** All deficit (negative) balances **must** be resolved by August month-end close

# FY22: Ending Balance Report Review

- Options for Clearing out Deficits (Remember to watch Year End Deadlines!)
  - Budget transfer from another cost center
  - Work with Accounting to move non-personnel expenses
  - Submit eForm to move personnel expenses (retroactive and future)
  - Consider if there may be a timing difference on expected funding

- In July/August, negative balances will also be shared with the University Finance Team (including Sr VP for Business Affairs and Provost)

Budget Office will be contacting departments during the last few months of the fiscal year to discuss negative balances and options on clearing

# FY23: Operating Budget

Budgets are prepared in Hyperion, then original budget journal is loaded into PeopleSoft

**When will you see your budgets –**

- Load Original Budgets into PeopleSoft the first week of August
- Spreadsheets with budget details will be provided to college and VP financial leads

# FY22: Carry Forward into FY23

- Load into PeopleSoft at the end of September
- Budget check will be turned off during September
- Spreadsheets with carry-forward details will be provided to college and VP financial leads
- Important Note: Budgets related to open POs that roll forward to the new fiscal year will be loaded into the same cost center

# FY22: Carry Forward Process


Projects that cost $10,000 or more

- Should use cost centers with a function 800
- Balances will roll forward in the same cost center at year end

Projects that cost less than $10,000

- Should use departmental M&O cost centers
- Depending upon the Fund Code these funds may lapse to a Dean/VP Reserve

For departments with normal operations in Function 800

- Budget Office will review to ensure that only those for projects of $10,000 or more roll forward
- Others will follow the standard Carry Forward and Lapse Rules

# FY22: Carry Forward Process

End-of-Year Balances Include the Following:

- **Committed** refers to current year encumbered purchase orders that were completed (services or good received in current year) where funds will need to roll forward as payment to vendor will occur in new year.

| E&G and Designated Tuition Funds | | |
|---|---|---|
| **Fund Description** | **Fund Number** | **Process** |
| E&G (excludes select group of cost centers for E&G lab fees – see below) | 2100 | **Academic Revenue Units**<br>• All E&G and DT unexpended balances lapse to dean's Reserve Cost Centers. This includes current year salary savings (both faculty and staff).<br>• Certain exceptions will not be lapsed to Reserve, but will roll forward to the same cost center for a dedicated purpose (start-up, scholarships, plant, etc.).<br>• Committed balances roll forward to same cost center regardless of purpose.<br><br>**Academic and Admin Support Units**<br>• All E&G and DT unexpended balances, including staff salary savings, roll forward to SVP/VP Reserve Cost Center.<br>• Committed balances roll forward to the same cost center. |
| Designated Tuition | 3105 | |

# FY22: Carry Forward Process

| All Other Funding Sources | | |
|---|---|---|
| **Fund Description** | **Fund Number** | **Process** |
| E&G Fee Cost Centers | Select Group 2100 | Committed and unexpended balances roll forward to same cost center. |
| Non-Formula State Appropriations | 2115 | Unexpended balances are returned to the state. |
| CORE State Appropriations | 2110 | Unexpended balances in year one of the biennium roll forward to the same cost center.<br><br>Unexpended balances in year two of the biennium are returned to the state. |
| Other State Awards | 2120 and 2150 | Committed and unexpended balances roll forward to same cost center to be used for purpose awarded with the exception of the special item funding for Foster Care Pilot Program.<br><br>Foster Care Pilot Program unexpended balances are returned to the state. |
| Mandatory Fees | 3100 | **All Mandatory Fee Funds**<br><br>In accordance with the expected use of the Mandatory Fee, unexpended balances roll forward to a Reserve Cost Center, set up specifically for each Mandatory Fee.<br><br>Executive level (i.e., SVP or VP) will be involved with the appropriate fee unit lead to determine the **strategic use** moving forward. |
| Mandatory Student Services Fee | 3115 | |
| All Other Designated | 3100 | Committed and unexpended balances roll forward to same cost center, |

# FY22: Carry Forward Process

| Fund Description | Fund Number | Process |
|---|---|---|
| Service Centers (Re-charge Centers) | 3200 | Committed and unexpended balances roll forward to same cost center. |
| Auxiliary | 4100 thru 4700 | Unexpended balances roll to a Reserve Cost Center for each auxiliary type.<br><br>Executive Level (i.e., SVP/VP) will be involved with the appropriate auxiliary lead to determine the **strategic use** moving forward. |
| Grant/Contract | 5100 thru 5400 | Committed and unexpended balances roll forward to same cost center. |
| Gift and Endowment | 5500 thru 5600 | Committed and unexpended balances roll forward to same cost center. |
| Other Restricted (GASB 84) | 5800 | Committed and unexpended balances roll forward to same cost center. |
| Plant | 71XX | Committed and unexpended balances roll forward to same cost center. |
| Loan | 81XX | Unexpended balances roll forward to same cost center. |
| Agency | 92XX | Unexpended balances roll forward to same cost center. |

# Budget: Contact Us

Main line: 458-6615
Fax line: 458-4236

Email: budget@utsa.edu

Website: Budget

# Payroll Services

Frances Whitaker, Director

# Critical Payroll Deadlines - Salary

| | |
|---|---|
| **August 12** | Last date for Off-Cycle Check Requests accepted by the Payroll Office. There will be no Off-Cycle Check printing on August 26-31. |
| **August 15** | Last salaried employee weekly timesheet due date for the August 8-14 workweek to meet the August monthly payroll processing deadline. |
| **August 19** | Deadline to approve employees' timesheet, including *Overtime Comp Time Payout* (OCP) hours. |
| **August 19 4:00pm** | Additional Pay eForm Deadline; must be fully approved, without errors and received by deadline to process for payment using FY22 funds. |
| | **Note: Late entries will be processed following fiscal year – September.** |

# Critical Payroll Deadlines - Hourly

| | |
|---|---|
| **August 16** | Hourly employee weekly timesheet due date for the August 1-15 pay period due to their supervisor by August 16. |
| **August 17 (By 3:00 PM)** | Supervisor approval deadline is Aug 17 at 3 p.m. |
| **September 1** | 10 am - Hourly employee weekly timesheet due date for the August 16-31<br>3 pm – Supervisor timesheet approval due<br>**Deadlines condensed due to year end process kickoff** |
| | **Note: Late entries will be processed following fiscal year – September**. |

# Cell Phone Allowance

- Reports will be sent to VP office for annual review by mid July
- VP's will review and determine if all employees on their report are still eligible in FY 22
- If all employees are still eligible, return list confirming no changes to **payroll@utsa.edu** by **Sept. 2**

# Cell Phone Allowance

Changes required to list

- Return the list indicating changes such as allowance terminations or amount changes. Email completed list to payroll@utsa.edu

- Complete the cell phone allowance form to add allowance for an employee receiving CDA allowance for the first time or if to an employee that did not have CDA active for FY22. Attach the completed cell phone allowance form to an additional pay eForm and route for approval.

Cellular Phone Allowance Form

- Form does not require VPBA signature, however division VP signature is still required

# Additional Pay eForms

- Ensure all Additional Pay eForms are submitted and approved according to the Additional Pay eForm Deadline Calendar.
- Additional Pay Processing Deadlines can be found here. Calendar will be updated for FY23 dates.
- As a friendly reminder, Additional pay is **non-eligible pay** type category for Off-Cycle checks per Financial Guidelines.

# Contact Us

Main line: 210-458-4280

Fax line: 210-458-4236

Location: NPB 451

Email: payroll@utsa.edu

Website: Payroll

# Accounting Services

Cynthia Schweers, Assistant Controller

# Critical Accounting Deadlines

| | |
|---|---|
| August 19 | Corrections through July due to Accounting Services by 5 PM |
| September 2 | Inventory Reconciliation due to Account Services by NOON |
| September 2 | IDT for services rendered for FY22 must be received in Accounting Services |
| September 4 | Tentative – Announcement from Financial Affairs to review (preliminary) August reconciliation |
| September 8 | Corrections for August due to Accounting Services by 3 PM |
| **Once deadlines have passed, any prior year corrections involving cost centers will require a budget transfer** | |

# Cost Transfers and Corrections Critical Dates

| | |
|---|---|
| August 14 | July 2022 activity cost transfers are due to Controller.VPRAssist@utsa.edu by 5 PM |
| September 4 | Preliminary reconciliations tentatively ready (will be announced) |
| September 8 | August 2022 activity cost transfers are due to Controller.VPRAssist@utsa.edu by NOON |

# General Accounting Information

REMINDER

- Accrual and pre-paid threshold is $10,000
- If less than $10,000 it will be expensed in year paid

# Accounting Corrections

- Follow established procedures for all manual and easy correct journal - https://www.utsa.edu/financialaffairs/services/accounting/corrections/index.html

- Send corrections for sponsored projects to the applicable RSC administrator
  - These corrections will follow same guidelines and deadlines as those sent for manual accounting corrections
  - Link to instructions & form - https://www.utsa.edu/financialaffairs/services/accounting/grant-accounting/cost-transfers.html

**Corrections due September 8 at 3PM**

# Accounting Corrections

- Provide the following information for **Manual** Corrections:
  - Document ID number
  - Original cost center and account used (not budget accounts like A4000)
  - New cost center and account for correction
  - Amount of correction, esp. if only a partial correction
  - Reason for the correction
  - Copy administrator on account being charged (approval is implied)
  - Prior year corrections – none will be made after year end – **critical to review currently**

# Year-End Accounting Functions

Accruals – Items owed but not paid before end of year

- For services rendered or goods received as of August 31
- Materiality factor of > $10,000 per item
- Vouchers for $10,000 or less must be to DTS by **08/22/22** at **5pm** to be included in FY2022 expenses

Service Centers Inter-Departmental Transfers (IDT's)

- IDT for services rendered for FY22 by **NOON** on **9/02/22**

Inventory

- Relevant Departments: Complete inventory count and reconciliation must be sent to Accounting by **9/02/22** at **NOON**


# Fiscal Services

- All FY22 departmental revenue must be delivered to Fiscal Services no later than **4:00pm on August 31** in order to be recorded in the correct fiscal year.
- All reimbursement requests for petty cash funds for FY22 must be submitted to Fiscal Services no later than **3:00pm on August 31**.
- Requests submitted after this time will be recorded in the upcoming FY23 fiscal year.

# Year-End Considerations for Capital and Controlled Purchases

Please ensure that Receiving Reports are complete for any capital and controlled items **received by August 31.**

NEVER complete a Receiving Report for an item not received. That is considered false financial reporting.

Once received, please contact the Inventory Department to have items tagged to ensure they are recorded with FY22 activity.

# 5 Minute Break

# Purchasing

Ynes Alderson, Assistant Director

# Purchasing Department
# FY22 Year-End Dates

| | |
|---|---|
| June 1 | Next Year Flag activated in Rowdy Exchange |
| June 24 | Last day to submit requisitions over $50,000 using FY22 Funds** |
| July 29 | Last Day to submit FY22 requisitions with value between $15,000 - $49,999 |
| August 12 | Last day to request FY22 Purchase Order Closures |
| August 12 | Last day to submit POC Purchase Order Change request |
| August 19 | Access to Rowdy Exchange removed until Sept 1 |
| **Post PO Roll** | Requisition creation using FY23 funds enabled (no later than Sept 2nd) |

*Purchasing **will not** process any requisition received after the deadlines stated above. Orders received after these deadlines will be returned and asked to be recreated for FY 23.

** All workflow approvals (budget, commodity, and foreign vendor) must be completed by COB (close of business) of deadline date.

# Purchasing Department
# Purchase Order Encumbrance Clean Up

- Reviewing Purchase Orders with remaining encumbrance should take place monthly throughout the year.
- Use the following PeopleSoft queries for reviewing PO encumbrances Focus on all PO's with open encumbrance
    - **UTS_PO_OPEN_ENC_BY_CC**
    - **UTS_PO_OPEN_ENC_BY_DEPT**
    - **UTS_PO_OPEN_ENC_BY_PROJECT**
- Closing a PO releases any remaining encumbrance, if you wish to use the funds this year close-out prior to July 1.
- Request to close PO's must be received by end of day August 12
- Eligible PO's with remaining encumbrances will **automatically** roll into FY23, unless a request to close the PO is sent to purchasing@utsa.edu

# Purchasing Department PO Roll – Not eligible

- POs with Quantities that have been fully received (with partially paid lines)
- Zero encumbrance POs and zero dollar lines are not eligible to roll

# Purchasing Department
# Valid PO Roll Requirements

- PO must have a valid Budget

- Budget errors prevent PO roll (Department must correct)
  - Closed Grants
  - Insufficient funds
  - Invalid Cost centers and department ID's

- Purchasing will work with departments to resolve matching issues if possible

Note: In the event a purchase order did not roll, departments must create a new requisition in the new year.

# Purchasing Department
# Service POs

Recurring services billed on a monthly bases must be encumbered with a new or existing PO

- Existing PO's (POC):

  Copier Service (POC required to add funding)

- New PO's created for:

  Cell Phones ref. HOP 9.49 Cellular Phones and Services

  Maintenance Agreements

**Remember to select Quantity 1, Amount only for services or long-term lease agreements**


# Contact Us

Main line: 210-458-4060

Fax line: 210-458-4236

Location: NPB 451

Email: purchasing@utsa.edu

Website: Purchasing

# Disbursements, Travel, and Credit Card Administration

Nora Compean, Director of Disbursements & Travel Services

# Critical Disbursements & Travel Services Deadlines

| | |
|---|---|
| July 8 | Departments must route electronically **all** Non-PO vouchers and Expense Reports to DTS from Sept – June (reimbursements, travel advances, participant advances, athletic advances, student travel expenses) |
| July 15 | Departments must route electronically **all** Non-PO vouchers and Expense Reports to DTS from July 1-15 (reimbursements, travel advances, participant advances, athletic advances, student travel advances) |
| August 5 | Departments must route electronically **all** Non-PO vouchers and Expense Reports to DTS from July 16-31 (reimbursements, travel advances, participants advances, athletic advances, student travel expenses) |
| August 16 | Departments must route electronically **all** Non-PO vouchers and Expense Reports to DTS from August 1-15 (reimbursements, travel advances, participant advances, athletic advances, student travel expenses) |
| August 22 | Departments must route electronically **all** Non-PO vouchers and Expense Reports to DTS for any expenses incurred from August 16-19<br><br>Last day to submit Wire Transfer Requests |
| August 22 | Departments must route electronically **all** Non-PO vouchers and Expense Reports to DTS if expensed out in FY22 for $10,000 or less |
| August 24 | All remaining Expense Reports after August 20 must be submitted and routed to DTS if expensed out in FY22 (reimbursements, travel advances, participants advances, athletic advances) |
| August 29 | Last check run at noon for FY22 |
| September 1 | FY23 open for processing |

# T&E Helpful Queries

Monitor document status on Expense Reports in the Workflow:

- **UTS_EXP_PND_STAT_WF_PRMPT_MOD**

Monitor open encumbrance Travel Authorizations for department travelers. Queries are available in production:

- By cost center: **UTS_TE_TAUTH_OPEN_ENC_BY_CC**
- By department: **UTS_TE_TAUTH_OPEN_ENC_BY DEPT**
- By project ID: **UTS_TE_TAUTH_OPEN_ENC_BY_PROJ**

# Prepayments and After-the-Fact (ATF)

**Prepayments**

- Prepayment terms must be referenced on Purchase Order (PO)
- Prepayments more than $10,000 require approval from Director of DTS or Assistant VP of Supply Chain
- Submit invoice to disbursements.travel@utsa.edu

**After -the-fact (ATF) PO**

- Required if PO or contract was not processed **prior** to goods delivered or services rendered
- Access Rowdy Exchange to process ATF
- Reference ATF# on invoices and submit to disbursements.travel@utsa.edu

# PaymentWorks: Vendor Onboarding Process

- Visit the Supplier Setup webpage
- To onboard new vendors, department must send invitation to initiate vendor to complete registration process
- Department role is to monitor registration status
- Existing vendors may continue to be used if no changes or vendor updates are necessary
- Foreign vendors are also approved by the **Office of Research and Integrity** (ORI)
- Possible delays are contingent on expediency with which vendors complete the registration and/ or clearance of financial sanctions
- PS Navigation: Click on UTSA Business Solution Center tile

# One Card Year-End Deadlines

| | |
|---|---|
| **July 15** | **Recommend last day to charge to FY22***<br><br>**Departmental approval due by 5 pm for July 3 statement** |
| August 4 | Transactions for August 3 statement ready for reconciliation |
| August 16 | Departmental approval due by 5 pm for August 3 statement |
| September 5 | Transactions for September 3 statement ready for reconciliation |
| September 8 | One Card reconciliations completed and approved by 10 am on September 8 will be processed for immediate payment<br><br>Payment vouchers over $10,000 will be charged to FY22; all others will be charged to FY23 |

*Please follow the recommended last day to charge if you want to pay from FY22 funds. UTSA has no control over the vendor's or the bank's credit card processing and posting dates.

# One Card Reminders

- On-Demand training: **One Card Reconciliation and Payment Processing (AM590.01)** available on MyTraining
- Visit the **Credit Card Administration** website for more information
- Credit cards are mailed directly to departments
- Monthly reconciliation is due by the 20th of each month (or other published deadline due to holidays or EOY activities)
- Departments create non-PO vouchers to pay Citibank
- Include justification for daily or credit limit increases or to add an MCC code
- Contact information: Send inquiries to creditcards@utsa.edu

# Contact Us

Main line: 458-4213
Fax line: 458-4236

Location: NPB 451

Email: disbursement.travel@utsa.edu
creditcards@utsa.edu

Website: Disbursements & Travel Services
Credit Card Administration

# People Excellence

Georgina Anguiano-Elliott, Employee Services Manager

# Fall Hires/Rehires

- Faculty
  - New office Faculty Personnel Services will be the final approvers
- Staff
  - Check the TAM posting box on eForm
- Students
  - No Changes

# New Hire Process

- Employees may **not** begin working until approved by People Excellence via a "completed" status eForm

- All new employees must complete the Employee Self Service (ESS)
  - Complete I-9 form section 1 no later than date of hire
    - Documents must be verified in person, NPB 451 8a.m.-12p.m. and 1p.m.-5p.m.
  - W4 and direct deposit
  - Biographical updates like address changes, emergency contract, privacy, veterans, ethnicity

- Hire/Rehire routed no later than 30 days before effective date

# Helpful Information

- All new hires will need a background check
- Missing/Incorrect information will cause delays or denials
- Search match is REQUIRED
- Do not create or route more than one eForm at a time for an employee or position number
- Allow 2 weeks for processing due to unforeseen delays and peak processing periods

# Terminations

- Appointments with end dates will auto term
- Resignations, terminations, retirements, etc.
  - Use termination request in eForms
- Reference payroll deadlines
  - Beware of overpayments
    - Monthly employees (i.e. graduate level student employees)

- Faculty
  - Only term faculty who are truly separating from UTSA
  - Non-benefits eligible faculty will auto term
  - Benefits-eligible faculty will require a termination eForm if separating from UTSA

# Guideline for Maximum Vacation Carryover

- Number of years of TX state service determines the maximum number of vacation hours that can be carried from one fiscal year to the next.

- Projected vacation carryover amount can be found in Employee Self Service under absence balance details. (ESS/Time and Attendance/Absence Balance Details)
  - Maximum hours to carry forward is proportionate to the employees' FTE

- All vacation leave requests should be approved by the employee's immediate supervisor in advance before taking leave
  - Vacation time over the maximum must be taken no later than Aug. 31

- Vacation hours exceeding carry over limit will be converted to sick leave at the end of each fiscal year around Sept. 1

# Absence Balance Details

## Time and Attendance

Absence Balance Summary | Absence Balance Details | Allowable Carryover Details | Personal Workforce Summary | State Service | Retirement Program

| | | | | | |
|---|---|---|---|---|---|
| Name | | Employee ID# | | Employee Record | 0 |
| Department | | Employee Classification | CL | Payroll Status | Active |
| State Service Months | 101 | Last Period Finalized | 04/16/2021 | 6-Month Service Eligible | Yes |

### Current Carryover Details

Personalize | Find | First 1 of 1 Last

| Current Service Months | Current Accrual Rate | Current Vacation Balance | Maximum Carryover | Projected Accruals | Projected Vacation Balance | Projected Transfer to Sick |
|---|---|---|---|---|---|---|
| 101 | 10.00 | 290.00 | 268.00 | 30.00 | 320.00 | 52.00 |

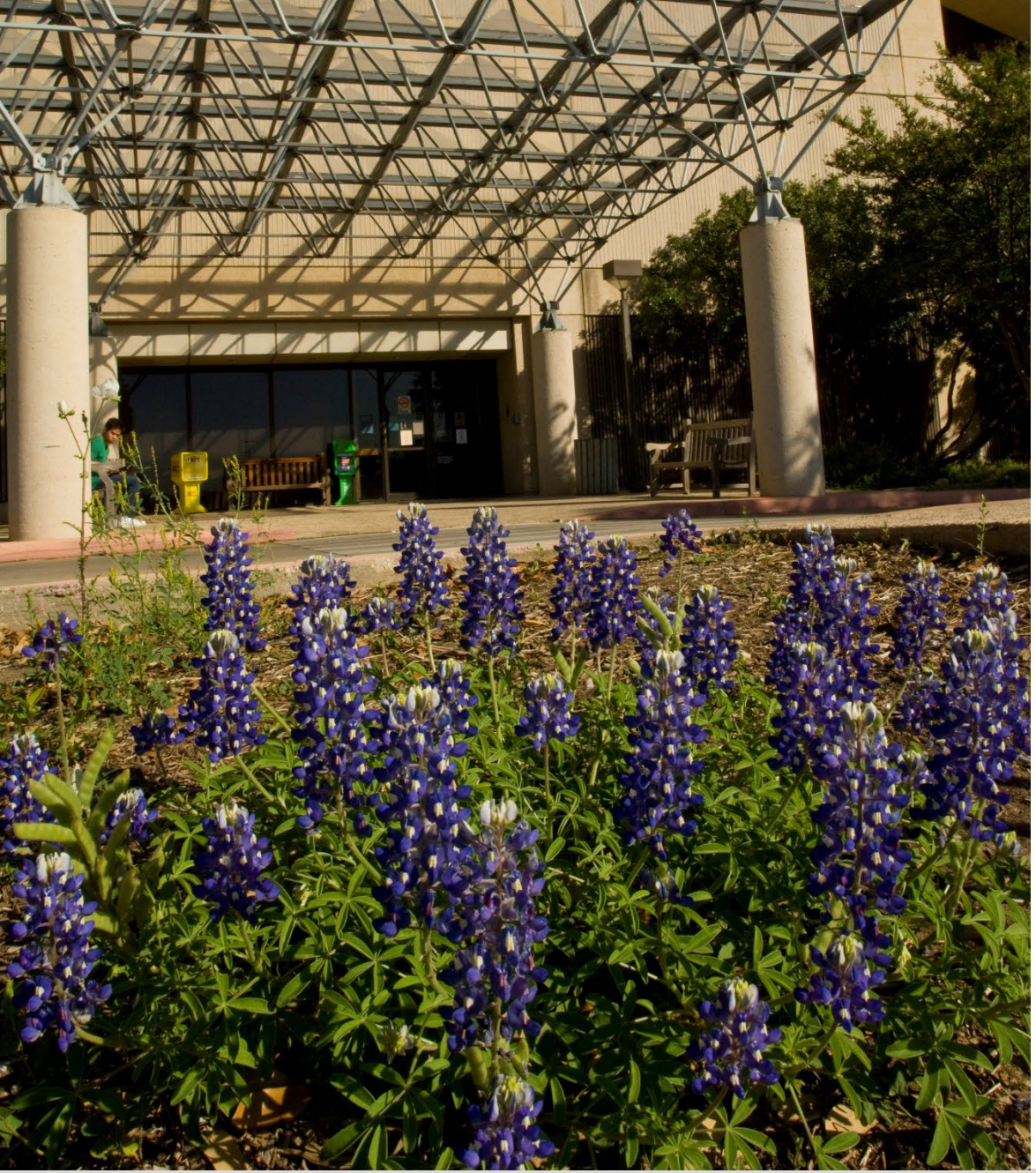
*Projected Accruals hours are based on current accrual rate.

### Historical Carryover Details

| Historical Adjustment Dates | Historical Carryover Adjustments |
|---|---|
| | |

### Vacation Leave Accrual Rate and Maximum Allowable Carryover

| State Service Months | Hours Accrued Per Month | Allowable Accrued Hours to Carryover |
|---|---|---|
| 0 to 23 | 8.00 | 180.00 |
| 24 to 59 | 9.00 | 244.00 |
| 60 to 119 | 10.00 | 268.00 |
| 120 to 179 | 11.00 | 292.00 |
| 180 to 239 | 13.00 | 340.00 |
| 240 to 299 | 15.00 | 388.00 |
| 300 to 359 | 17.00 | 436.00 |
| 360 to 419 | 19.00 | 484.00 |
| 420 to 999 | 21.00 | 532.00 |



# Helpful Links

- eForms Job Aid
- CBC
- Talent Acquisition

- Student Titles
  - HOP 4.09, Student Employees
  - Student Titles - Monthly
  - Student Titles - Semi Monthly

# Contact Us

Main line: 458-4250
Fax line: 458-4287

Location: NPB 451

Email: hr@utsa.edu

Website: People Excellence

# Test Your Knowledge

1. Open an internet browser
2. Go to www.menti.com
3. Enter the code you see on the screen
4. Type in your first name and hit enter

# Evaluation

Please complete the electronic evaluation form to help us improve our workshops

There are three ways for you to complete the evaluation form

1. Click the link provided in the chat box
2. Scan QR code with your mobile device
   Open the camera on your mobile device and hold over QR code
3. Open your browser and type in the web address below
   https://mytraining.utsa.edu/apps/evaluation

Once at the evaluation website

1. Click Load Classes (Orange Tab)
2. Click PS0209.02 Financial Affairs Fiscal Year-End Workshop
3. Click Start Evaluation
4. Click Give Feedback

NOTE: Number 1 = Low and Number 7 = High

Please add comments in the open comment box at the end of the evaluation

UTSA®

CREATING

BOLD

FUTURES®