

ADMINISTRATIVE PROFESSIONALS TRAINING



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ADMINISTRATIVE PROFESSIONALS

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Administrative Support Duties





These are duties performed by administrative support staff such as Office Managers, Administrative Specialists or Staff Assistants and are sometimes performed by other staff such as Academic Program Specialists. Duties will vary with each position; for example, while Office Managers will perform most of these duties, Staff Assistants will typically perform only a few of the duties.

To determine the training you need, review your position description and talk with your supervisor to get a list of duties you are expected to perform. Then, review the list to see the training offered for each category of duties.





Duty/Job Function	Training Needed
Fiscal Duties	
 General Ledger/Budgets (not incl. Foundation funds) <ul style="list-style-type: none"> • Monitor budget and expenditures for all accounts, using FAST or other reporting system • Generate budget projections based on needs and salaries • Reconcile departmental accounts monthly with Finance Mart 	<ul style="list-style-type: none"> <input type="checkbox"/> Accounting Concepts <input type="checkbox"/> Finance Mart Reporting <input type="checkbox"/> Financial Systems Intermediate <input type="checkbox"/> Financial Systems Introduction <input type="checkbox"/> General Ledger <input type="checkbox"/> Reconciliation
 Purchasing and Accounts Payable <ul style="list-style-type: none"> • Initiate and/or approve requisitions (incl. obtaining quotes) • Receive on purchase orders and process invoices for payment • P Card Holder, Verifier and/or Reconciler • Arrange travel and process TARs if needed • Process travel reimbursements and track 	<ul style="list-style-type: none"> <input type="checkbox"/> P Card Holder Training <input type="checkbox"/> P Card Reconciliation <input type="checkbox"/> Purchasing Hands On Requisition <input type="checkbox"/> Travel Rules and Requirements <input type="checkbox"/> Travel Submission
 Foundation Accounts <ul style="list-style-type: none"> • Monitor expenditures and deposits either using OASIS ALUM or Foundation office reports • Process Check Requests for payment or reimbursement for purchases and travel • Complete EBA (Educational Business Activity) form to establish or amend foundation account as needed • Collect checks and make deposits as needed • Process and monitor scholarship payments 	<ul style="list-style-type: none"> <input type="checkbox"/> Foundation Financial Tools <input type="checkbox"/> Foundations Accounts Payable <input type="checkbox"/> Foundations Deposits Process <input type="checkbox"/> USF Foundation EBA <input type="checkbox"/> USF Foundation Endowed Chair <input type="checkbox"/> USF Foundation Fund Management <input type="checkbox"/> USF Foundation Reconciliation <input type="checkbox"/> USF Foundation Scholarship App <input type="checkbox"/> USF Foundations Overview
 Sponsored Research <ul style="list-style-type: none"> • Prepare or assist in preparation of grant proposal • Prepare or assist in preparation of grant budget setup • Monitor, track and reconcile general ledgers for grants • Complete or assist in completion of grant closing documentation 	<p>Training on research topics is changing rapidly as workshops are developed. Visit the TRAIN Depot for a complete list or search in GEMS Self Service for course codes beginning with GM.</p>

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 <p>Auxiliary Funds</p> <ul style="list-style-type: none"> • Complete EBA (Educational Business Activity) form to establish or amend auxiliary fund, as needed. • Complete yearly budget plan and quarterly reports • Set up customers, generate billing and track in accts receivables • Process interdepartmental billings using journal entry procedures • Reconcile expenditures and receivables to monthly reports 	<p><i>Auxiliary training includes fiscal training listed above plus:</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Banner Workflow Third Party <input type="checkbox"/> Banking and Cash Handling <input type="checkbox"/> Billing & Accounts Receivables <input type="checkbox"/> Cash Collection Training <input type="checkbox"/> Payment Card Industry Cert. <p><i>Membership in the Auxiliary Workgroup is strongly encouraged.</i></p>
Human Resources and Payroll	
 <p>Hiring, Appointments and Pay Actions</p> <ul style="list-style-type: none"> • Manage or assist with search process, including advertising, tracking applicants, interviewing and selection of candidates and EO reporting • Process appointment status forms for new hires, pay increases, terminations or other actions • Complete Extra State Compensation and Non-Recurring forms when needed • Run reports and queries in GEMS to pull information as needed. • Recruit for new hires in GEMS • Initiate Background Checks for applicants to be hired • Maintain position profile descriptions in GEMS 	<ul style="list-style-type: none"> <input type="checkbox"/> Cool GEMS Tricks (online) <input type="checkbox"/> GEMS Appointment Training <input type="checkbox"/> GEMS Appointments Refresher (online) <input type="checkbox"/> GEMS Basic (online) <input type="checkbox"/> Recruiting Overview (online) <input type="checkbox"/> Recruit-Create Job Opening (online) <input type="checkbox"/> Recruit-Manage Applicants (online) <input type="checkbox"/> Recruit-Prepare Job Offer (online) <input type="checkbox"/> Recruiting Solutions (four online pre-reqs) <input type="checkbox"/> GEMS-Maintain Positions (online) <input type="checkbox"/> Recruit – Interviewer (online) <input type="checkbox"/> GEMS Reports & Queries (online) <input type="checkbox"/> Background Checks (online) <input type="checkbox"/> How to Complete an I-9 (online) <input type="checkbox"/> Navigating USF's HR Website (online)
 <p>Attendance and Leave Benefits</p> <ul style="list-style-type: none"> • Attendance and Leave coordinator • If needed, act as Work Comp rep for department 	<ul style="list-style-type: none"> <input type="checkbox"/> Attendance & Leave Audit Class <input type="checkbox"/> GEMS ALT Leave Coordinator <input type="checkbox"/> HR-A&L Policies & Procedures <input type="checkbox"/> Worker's Compensation
 <p>Payroll</p> <ul style="list-style-type: none"> • Collect and review timesheets for accuracy • Prepare or Certify payroll certs • Review RSA checks and, if necessary complete pay distribution • Run payroll registers and reconcile to FAST • Process, as needed, payroll adjustments, etc. 	<ul style="list-style-type: none"> <input type="checkbox"/> GEMS Preparing Payroll (online) <input type="checkbox"/> GEMS Certifying Payroll (online) <input type="checkbox"/> GEMS Pay Distribution (online)


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Office Administration	
 <ul style="list-style-type: none"> Understand and interpret USF policies and procedures Department contact for computer and telephone issues, including submitting work orders, setting up new accounts Physical Plant contact for work orders and repairs/moves Use IFIS Space Utilization system to track the use, function and occupancy of university spaces Process key requests and maintain key inventory and/or building card access Manage all departmental assets (property) Produce reports and correspondence as needed Maintain calendars as required; arrange meetings, set appointments, etc. 	<ul style="list-style-type: none"> <input type="checkbox"/> USF 101 – Stuff you need to know (online) <input type="checkbox"/> Writing Effective Emails <input type="checkbox"/> Email 101 (online) <input type="checkbox"/> Time Management <input type="checkbox"/> IFIS Space Utilization System <p><i>Atomic Learning, available on the MyUSF portal, provides a wide variety of online training on USF's most commonly used software, including Outlook, Word, Excel, and Access, as well as soft skills training such as customer service.</i></p>
 <ul style="list-style-type: none"> Supervise FWSP, OPS or USPS as required, including training, performance feedback and evaluations 	<ul style="list-style-type: none"> <input type="checkbox"/> Performance Management and Evaluation <input type="checkbox"/> Performance Eval Procedures (online) <input type="checkbox"/> Giving & Receiving Performance Feedback <input type="checkbox"/> Diversity for Supervisors <input type="checkbox"/> Disability and Accommodation (online)
 <p>USF Essentials Helpful training for all USF employees, including training on GEMS Self Service.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Child Abuse Reporting Policy (online) <input type="checkbox"/> USF Net ID - How to Create-Use (online) <input type="checkbox"/> USF101: USF Departments (online) <input type="checkbox"/> Writing Effective Emails <input type="checkbox"/> Email 101 (online) <input type="checkbox"/> GEMS Self Service Overview (online) <input type="checkbox"/> Managers Attendance & Leave (online) <input type="checkbox"/> Requesting Leave (online)
Student and Academic Support	
 <p>Student and Academic Support</p> <ul style="list-style-type: none"> Track student registration and financial aid awards Input access for course schedules Managing student course permits, registration and holds Advising – for professional development opportunities, check with your Director of Advising 	<ul style="list-style-type: none"> <input type="checkbox"/> OASIS FERPA Tutorial (online) <input type="checkbox"/> OASIS Navigation (online) <input type="checkbox"/> OASIS Holds <input type="checkbox"/> OASIS Permitting <input type="checkbox"/> OASIS Registration <input type="checkbox"/> Banner Class Schedule <input type="checkbox"/> Got Your 6, Veteran Success

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Duty/Job Function	Training Needed
 Faculty Support <ul style="list-style-type: none">• Enter or monitor faculty scholarship (SAVE)• Assigned Faculty Duties/Faculty Activity Report (AFD/FAR)• Assist faculty in completion of their annual report• Assist faculty as needed with tenure and promotion materials	Contact your Dean's office for training in FAIR, including AFD/FAR and SAVE.