



Business Operation Forum

23 September 2020



California State University
MONTEREY BAY

Agenda

- **Introductory Remarks:** Kevin Saunders, VP Administration and Finance and CFO
- **Procurement of Restricted Hazardous Materials or Equipment:** Amy Thomas, Director of Enterprise Risk Management and Environmental Health and Safety and Art Evjen, Director of Business and Support Services
- **Work Induction Board (WIB) process:** Rick Boggs, Facilities Integrated Workplace Management System Analyst and Joseph Nugent, Director of Facilities Maintenance & Operations
- **CFS 4.0 Upgrade:** Susan Koch, Director of Administrative Systems Management
- **Pre-Submitted Q&A:** Finance Teams



Introductory Remarks

- Kevin Saunders



Procurement of Restricted Hazardous Materials or Equipment

**Presented Jointly by Procurement and
Environmental Health, Safety & Risk
Management (EHSRM)
September 23, 2020**



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Agenda

Art Evjen – Looking Back

Current Guidelines and Resources

Amy Thomas – Looking Forward

Updated Guidelines and Near-Future Processes

Opportunity for Questions



Current Guidelines

“Hazardous Materials Procurement Program”

found at our Procurement website:

<https://csumb.edu/finance/procurement/>

“Procurement Card Program Handbook (Rev. 2018)”

found at the very same Procurement website:

<https://csumb.edu/finance/procurement/>

especially Appendix A – Hazardous Materials Procurement



Current Guidelines

Very broad scope of “Hazardous Materials”
including 3 lists, NIOSH, EPA,
Monterey Bay Air Resources District

Allowing for purchases via
Purchase Requisition/Purchase Order
Procurement Card

“Restricted, rather than Prohibited”

References to “Authorized Individual”



What We Need Now...

More User-Friendly Guidelines and Process Flow

Less Restrictive, Yet Appropriate Procurement Procedures

Clear Identification of “Authorized Individuals”

Training of Authorized Individuals

Revised and Published Procurement Guidelines and
Procurement Card Program Handbook (Rev. 2020)



Guidelines for Procurement of Restricted Hazardous Materials or Equipment

**Provided by: Environmental Health, Safety
& Risk Management (EHSRM)**

Fall, 2020



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Purpose

This program helps ensure that faculty, staff and auxiliary organizations consider applicable safety and environmental compliance issues before obtaining restricted hazardous materials or equipment.

The use of hazardous materials at CSU Monterey Bay creates a variety of potential safety and environmental compliance issues. The purpose of this Procedure is to ensure that applicable compliance issues are considered and addressed **before** a restricted hazardous material or restricted equipment is procured and delivered to campus.



Scope

This procedure applies to all faculty, staff and students who purchase hazardous materials that will be stored or used on campus. Also included are purchases by CSUMB auxiliary organizations (Corporation), purchases for sponsored projects, and hazardous materials that are obtained as free samples or gifts.



Responsibilities

- **Hazardous Materials Requestor:** Responsible for ensuring all provisions of these procedures are followed when requesting and procuring hazardous materials.
- **Authorized Individuals:** Responsible for reviewing all hazardous material requisitions to ensure applicable compliance issues have been addressed prior to purchase.



Authorized Individual

- Person within a department, college or other administrative unit who has received the necessary training, and is authorized to review and approve hazardous materials procurement requests.
- Authorized Individuals will be provided training as required. This training will cover the relevant safety and environmental issues that must be considered when reviewing a request for hazardous materials.



Responsibilities

- EHSRM: Responsible for maintaining the list of Authorized Individuals and for providing periodic training for these individuals. Will also maintain and monitor the effectiveness of the program.
- Departments and Colleges: Responsible for ensuring these procedures are followed in their department or college. Must ensure that there are an adequate number of Authorized Individuals to prevent excessive delays when hazardous materials are requested.



Restricted HazMat List

- Detailed list will be posted on EHSRM website
 - CalOSHA regulated carcinogens (list)
 - Highly toxic gases (list)
 - Radioactive isotopes
 - Controlled substances (drugs)
 - Human blood or tissue
 - Biosafety level 2 or 3 hazards
 - Pesticides, insecticides, etc.
 - Diethyl ether (>2L)



Restricted Equipment

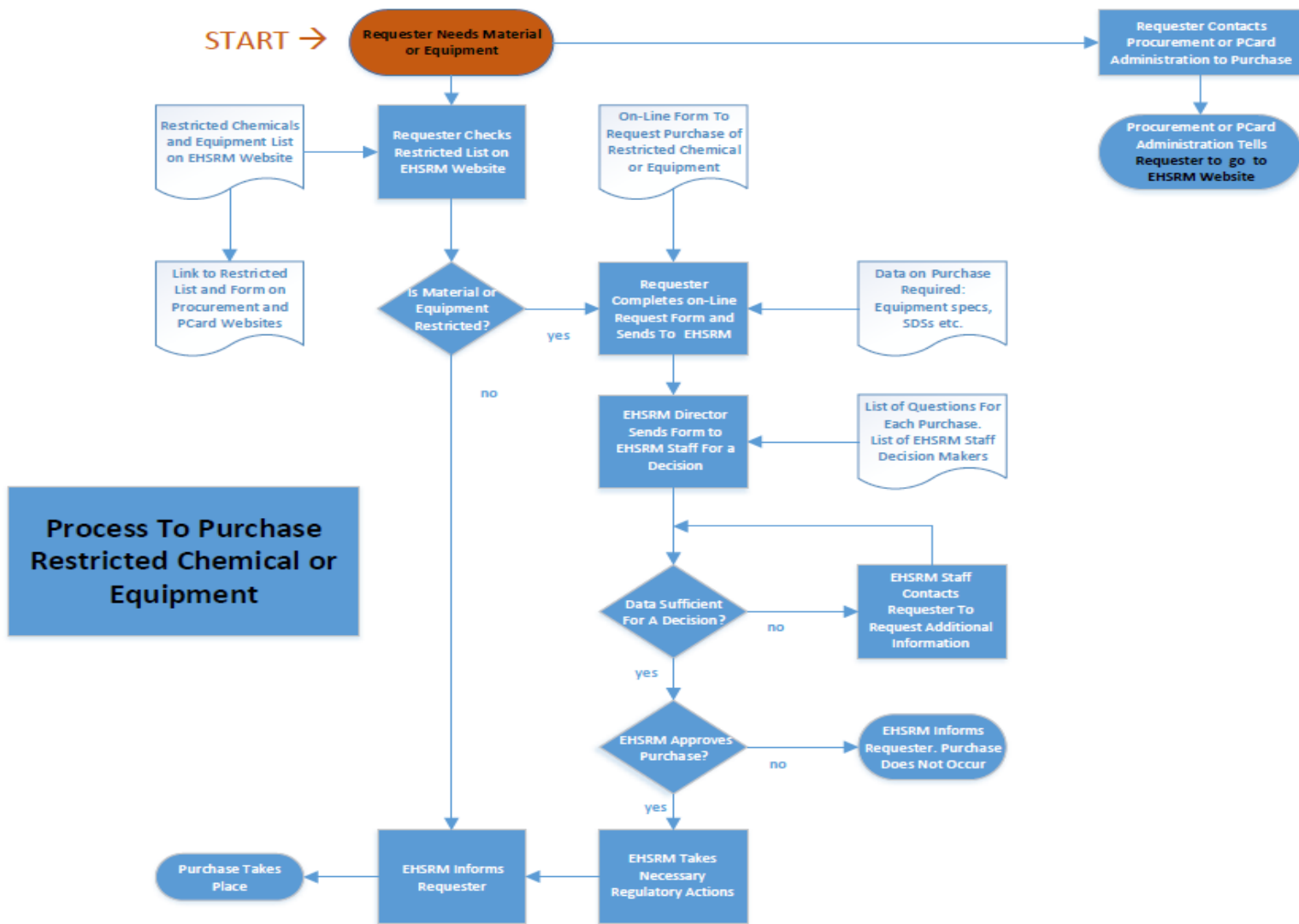
- Detailed list will be on EHSRM website:
 - AEDs
 - Air pollution abatement equipment
 - Biosafety cabinets
 - Chemical fume hoods
 - Class 3 or 4 lasers
 - Safety showers and eyewash stations
 - Emergency generators
 - Fire extinguishers
 - Fire suppression systems
 - Ionizing radiation producing equipment



Future Process... (on EHSRM website soon)

- Requestor checks restricted list on EHSRM website
- Submit Restricted HazMat Review Form to EHSRM
- EHSRM reviews request and works with requestor
- Approval/denial of purchase documented
- EHSRM informs requestor and authorized individual makes purchase
 - Requisition
 - Pro Card





Request Form

Version Sept 2020

FORM-1 REQUEST FOR EHSRM APPROVAL TO PURCHASE RESTRICTED CHEMICAL OR EQUIPMENT

Requestor Name:	
Email:	
Telephone #:	
Department:	
Building:	
Room:	

Check the type of material or equipment you wish to purchase:

MATERIAL TYPE	
BioSafety Level 2 or 3 Biohazards	
Cal/OSHA Regulated Carcinogens (see list)	
Controlled Substances (Drugs)	
Highly Toxic Gases (see list)	
Human Blood or Unfixed Human Tissue	
Pesticides, Insecticides, etc.	
Radioactive Isotopes	
>2L Container of Diethyl Ether	
EQUIPMENT TYPE	
Air Pollution Abatement Equipment	
AEDs	
BioSafety Cabinets	
Chemical Fume Hoods	
Class 3 or 4 Layers	
Deluge Showers and/or Emergency Eye Wash Stations	
Emergency Generators (50 HP or greater)	
Fire Extinguishers	
Fire Suppression Systems	
Ionizing Radiation-Producing Equipment	

Use the next page to identify the specific material or equipment you wish to purchase and why.

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FORM-2 REQUIRED INFORMATION ABOUT REQUESTED CHEMICAL OR EQUIPMENT

Identify the exact chemical or equipment to be purchased	
Describe how it will be used	
Describe where it will be used	
Describe who will use it	
Manufacturer's Name	
Manufacturer's Tel #	
Manufacturer's Website	
Vendor's Name	
Vendor's Tel #	
Vendor's Website	
Cost	
Special Notes/Comments	

For EHSRM use:	
Assigned to:	
Date:	
Approved:	
Disapproved:	
Sent decision to:	
Date:	



Summary

- Check EHSRM website when purchasing chemicals or certain equipment
- If item is on the restricted list, then authorized individual submit a form to EHSRM for review
- Once review process is complete, you will be directed to follow purchasing procedures



Questions

and
Perhaps,
Answers



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Facilities Management Updates

Facilities Management launched a new webpage to make it easier for customers to find and access information.

<https://csumb.edu/facilities>

Facilities Management

[About Us](#) [Services](#) [Planning](#) [Construction Projects](#) [Contact Us](#)

[CSUMB Home](#)

Facilities Management provides comprehensive planning, design, construction, maintenance and repair of University facilities and grounds with over 80 campus buildings and structures on Main Campus and 1,727 acres of campus property.

[Master Plan](#) [Current Projects](#) [Submit a Work Request](#)

News



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There are also new instructions on how to submit an access request.
<https://csumb.edu/facilities/services>

Services

Facilities Management staff provide a number of services ranging from event setup and cleanup to HVAC, electrical, plumbing, painting and locksmith services. All requests can be made through our Work Order Management System. Please follow the instructions below to submit your request.

Work Request

Submit a Work Request for all maintenance, non-maintenance and emergency services. See below for a list of all services provided.

All issues related to computers, internet or phones must go through the Information Technology Department by submitting an [IT Ticket](#).

Please submit only one request per building.

[Submit a Work Request](#)

For instructions and helpful information regarding service requests, please review [How to Submit a Work Request](#).

COVID-19: Access Authorization Form

Access to a Building for Retrieval of Items (temporary access only):

1. Obtain approval to access a building from the responsible manager.
2. Complete Steps 1 and 2 of the [COVID-19: Access Authorization Form](#).
3. Attach the completed/DocuSigned form to a [Work Request](#).

Access to a Building for In-Person Critical Business Function Work (longer term access):

1. Manager completes COVID-19 Dept. Risk Assessment process (includes training, supplies, signage, etc.).
2. Complete Steps 1 and 3 of the [COVID-19: Access Authorization Form](#).
3. Attach the completed/DocuSigned form to a [Work Request](#).



New Work Order Management System

Anyone can submit work requests from their mobile device or computer by going to the facilities webpage or by scanning a QR code.

Simply scan the QR code with a QR scanner to submit a request at CSU Monterey Bay



100



<https://app.limblecmms.com/#!/loc-problem/wgy8wx1804/6234>

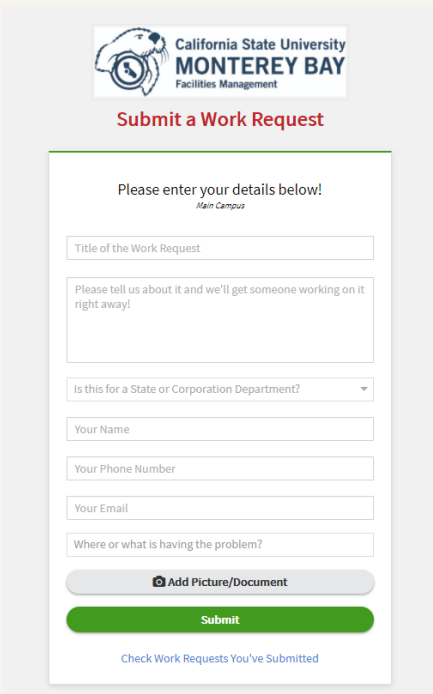
csumb.edu/facilities/services



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Submitting a Work Request

Enter in the following information to submit a request.



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Facilities Management

Submit a Work Request

Please enter your details below!
Main Campus

Title of the Work Request

Please tell us about it and we'll get someone working on it right away!

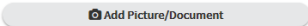
Is this for a State or Corporation Department?

Your Name

Your Phone Number

Your Email

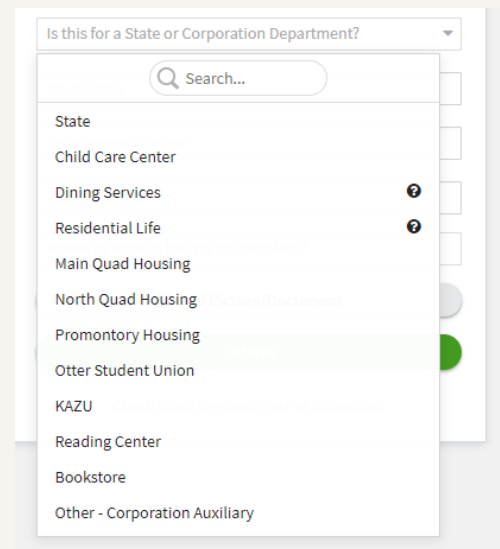
Where or what is having the problem?

 Add Picture/Document

Submit

[Check Work Requests You've Submitted](#)

Select the correct State or Corporation department. ?'s on the right side give the user more information about the selection.



Is this for a State or Corporation Department?

Search...

- State
- Child Care Center
- Dining Services ?
- Residential Life ?
- Main Quad Housing
- North Quad Housing [Add Picture/Document](#)
- Promontory Housing
- Otter Student Union
- KAZU [Add Picture/Document](#)
- Reading Center
- Bookstore
- Other - Corporation Auxiliary



Selecting a location

Use the Search... or use the drop-down menu to find the building or location you are looking for.

Searching for Facilities, will bring up all buildings have facilities in the name, along with all floors, rooms and equipment.

Where or what is having the problem?

Search...

I'm not sure

- Building
- Grounds
- Sports & Recreation Fields
- Streets
- Parking Lots
- Tools
- Vehicles

I'm not sure

Select Cancel

Where or what is having the problem?

facilities

- Buildings
 - Facilities Haz Waste - 037A
 - 037-EWS-05
 - Facilities Services & Operations - 037
 - 037-BFP-RP 3/4" Domestic -RPT- #4020040
 - 037-Floor 1
 - 037-0008 - Corridor
 - 037-TEC-01
 - 037-0010 - Administration
 - 037-0011 - Corridor

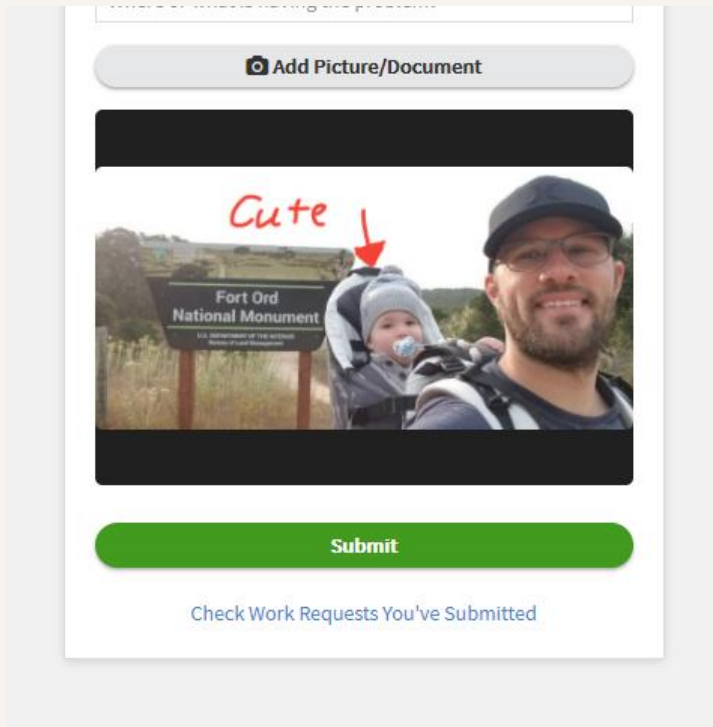
To find a search for a specific room, use this format: [Building #]-[Room #] 037-0010, **Don't forget the leading 0's or it will not work.**



Adding Pictures / Documents

You can also add pictures or documents to the request.

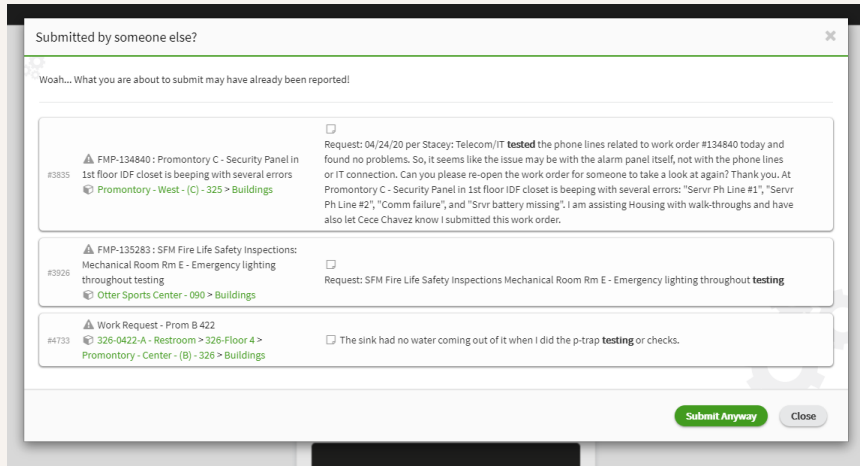
When you upload a picture, you also have the option to markup or crop the photo.



Duplicate work requests

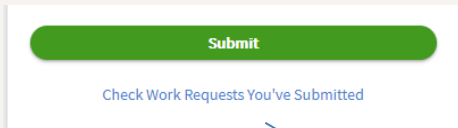
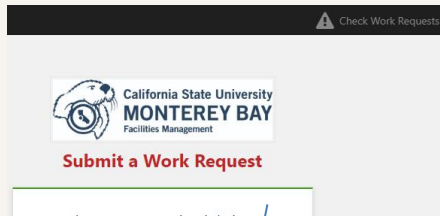
Limble searches all work orders to find work orders that are open and have specific key works.

For example, I submitted a request with the work Test in it. It is now asking me to review three open work orders with the word test.



If you select a building, it will only search for similar requests within that same building.





Work Request History

Viewing Work Requests for rboggs@csumb.edu

Search...

In Progress

	Name	Due	Assigned To
1 #328	Work Request - Facilities Services & Operations (FAC) - 037 > Building	2020/04/03	Work Control
1 #327	Work Request - Administration (ADMIN) - 001 > Building	2020/03/23	Work Control

- Users can easily find their *Work Request History* by clicking the link to *Check Work Requests* and entering in your email address.
- You can add comments to open requests that will notify the person assigned to the Request.
- You can also communicate through email directly to the person assigned.

Work Request Details

Submitted On 2020/03/27


Request Name Work Request - - Facilities Services & Operations (FAC) - 037 > Building

Request Description The outside light is broken

Requestor's Email Rboggs@csumb.edu

Requestor's Phone 4652

Pictures



Comments [Add Comment](#)

Other notable features:
Users can be notified via email when technicians post time and add comments.

Users can communicate with the technician about a Work Order directly through email.

Limble CMMS - Admin <wgy8wx1804--6234--331@comment-reply.limblecmms.com>
to Rboggs ▾

Replying to this email will send a comment back to the maintenance team...

Hi There!

The requested task: "[Standard Work Order - #331 - Facilities Services & Operations \(FAC\) - 037 > Building](#)" at "[CSU Monterey Bay](#)" has been completed.

Problem: The outside light is broken

Name: Rick

Phone Number: 4652

Email: Rboggs@csumb.edu

Here are the notes to the requester from your maintenance team:

"work done" - *Rick Boggs*

Many Thanks,

-- CSU Monterey Bay

tracking-code-58ca947adf3fc7412e40e0a0021c3e56f6a6595a248febf012eedb809ea42ead



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Thank you



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CFS 4.0 Upgrade

Impact to Campus Users

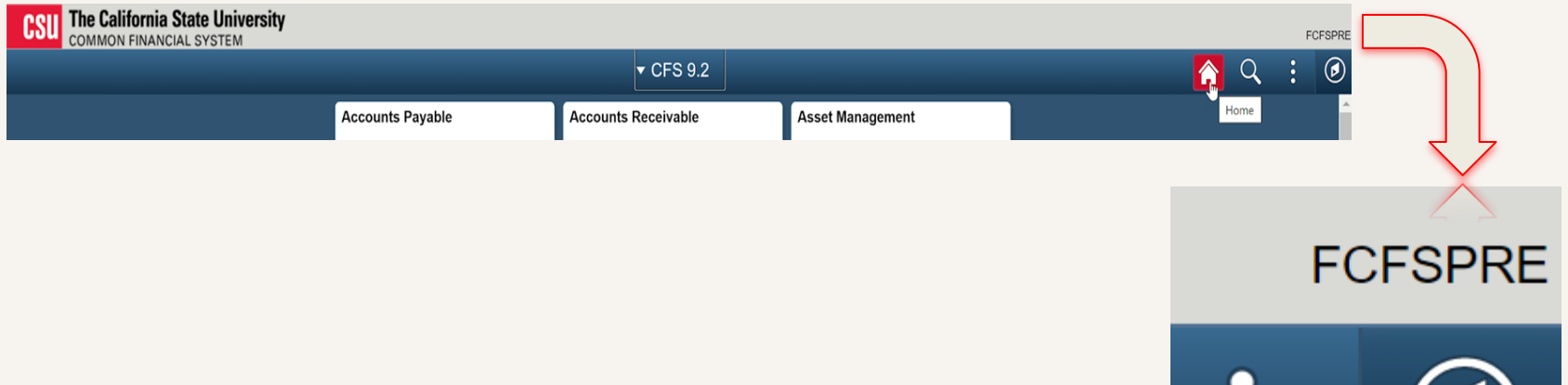
- Testing began this week
- Move to Production:
 - 5:00pm Nov 13 thru 9:00am Nov 16



CFS 4.0 Upgrade

Impact to Campus Users

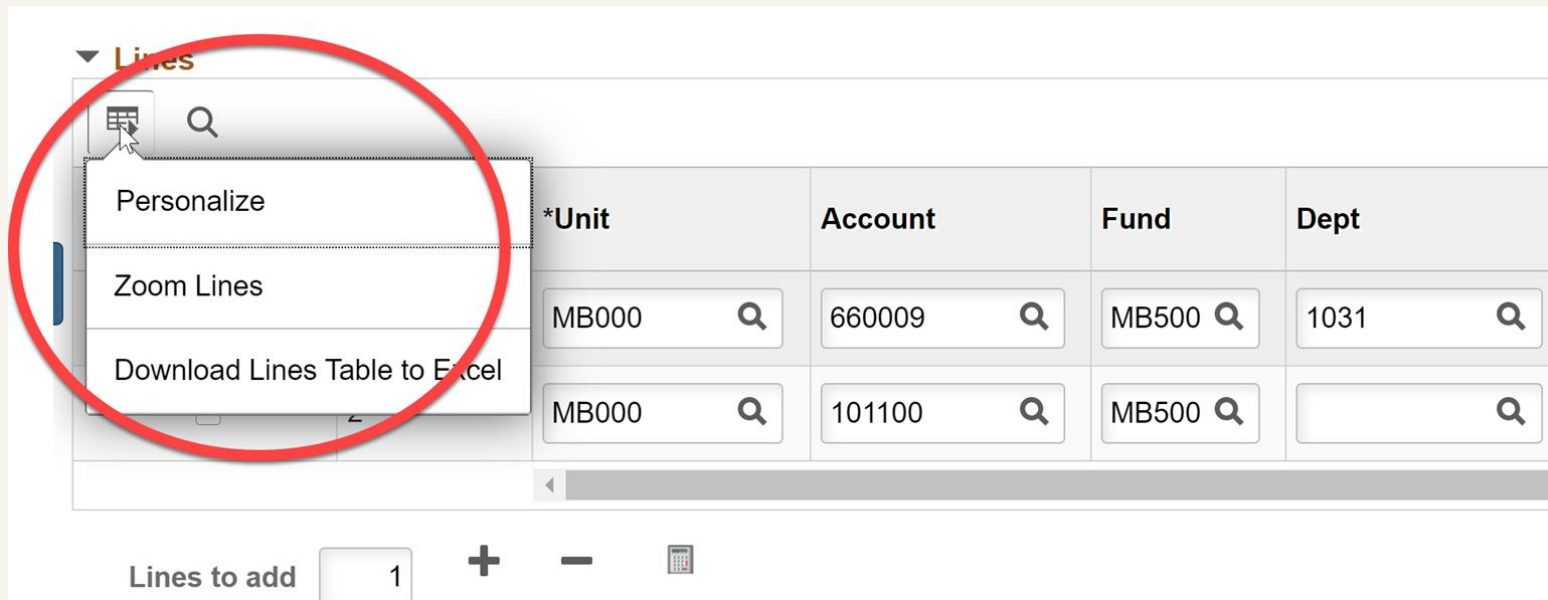
- Overall Look & Feel is changing -
 - New CSU Logo



CFS 4.0 Upgrade

Impact to Campus Users

- Overall Look & Feel is changing -
 - New Grid Enhancements



The screenshot displays a web-based interface for managing financial lines. A context menu is open over the first row of a data table, highlighting the 'Personalize' option. The table has four columns: *Unit, Account, Fund, and Dept. The first row contains the values MB000, 660009, MB500, and 1031. The second row contains MB000, 101100, MB500, and an empty field. Below the table, there is a control for 'Lines to add' set to 1, with plus and minus buttons and a calculator icon.

*Unit	Account	Fund	Dept
MB000	660009	MB500	1031
MB000	101100	MB500	



CFS 4.0 Upgrade

Impact to Campus Users

- ProCard Reconciliation
 - New Reconciled Check Box for each line

(Screenshot forthcoming)



Pre-Submitted Q&A

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Pre-Submitted Q&A

- When will Questa be really for dept ASC use?
- We were told ALL invoices would be sent to accounting to scan out to departments while we work from home. We were even directed to send the mail-room a list of our regularly occurring invoices (which we did), but I have not been receiving ours regularly for the past 3 months and am now past due in payments. I am not authorized to go on campus to get them myself. No one I have spoken to in accounting can help fix the problem. How can this catch 22 be resolved?



Pre-Submitted Q&A

- Will we be able to input questions via Zoom chat to be answered at the end of the session?
- Is it possible to implement myConcur as the primary reimbursement process and move away from the form system?
- Is there a way to share and implement Business Process Improvements as campus wide initiatives?
More cohesion campus wide would help prevent a lot of confusion and improve processing times.



Pre-Submitted Q&A

- I am tasked with managing the budget for my department. When items are moved or added to a different account than what I submitted, I typically I find out after the fact that changes have been made. Items are not always posted the same way either, so this makes it difficult when I am reconciling our invoices with what is posted in our Data Warehouse reports. I am hopeful that we can strengthen the communication between those who are adding or moving items in our Finance Data Warehouse with those of us who have to report back to our department and managers. Also, I there a way to assign one person to manage a department for sake of consistency?



Thank You

Upcoming meetings:

- 21 Oct 2020
- 18 Nov 2020

Visit the [BOF webpage](#) for more information



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