Communication Plan

Travel & Misc. Expense Authorization Form/
E-Reimbursement Process Changes

This document provides (1) timelines, (2) general communication and training plans, and (3) S/C/D-specific communication and training plans for the upcoming Travel & Misc. Expense Authorization Form implementation in the Shared Services Center.

Timeline

The implementation phase of the Expense Authorization Form and E-Reimbursement process to the Shared Services Center will take place July 22, 2019 to September 3, 2019. Below is an overview of the activities that will occur in each week leading up to the September 3 implementation date:

**Week of July 22**
- Communication Materials Drafted
- Training Materials Drafted
- Training Dates/Times Locations Confirmed

**Week of July 29**
- Communication Material Drafts Circulated for Feedback
- Training Materials Circulated for Feedback

**Week of August 5**
- Communication to SSC S/C/D Leadership regarding process change plan
- SSC Staff Training with BFS E-Reimbursement/Travel Staff
- Super-User Training Session

**Week of August 12**
- 1st Communication to SSC population regarding process change
- S/C/D Staff Training Sessions

**Week of August 19**
- 2nd Communication to SSC population regarding process change
- SSC Faculty Training
- SSC/BFS Roadshow to S/C/D meetings
**Week of August 26**
- General Training Sessions
- SSC/BFS Roadshow to S/C/D meetings

**Week of September 3**
- 3rd Communication to SSC population regarding process change
- Go Live Date of September 3
- SSC Staff Office Hours in all S/C/D
- SSC Website update with all pertinent information
- S/C/D website links updated with all pertinent information
- SSC/BFS Roadshow to S/C/D meetings

**Week of September 10**
- SSC Staff Office Hours in all S/C/D

**General Communication Plan**

There will be several documents created to facilitate the *communication* of the new Travel & Miscellaneous Expense Form and E-Reimbursement process:

- SSC Process Change Document
- Word Doc with detailed process steps
- Flow chart to show process flow (based upon detailed process document)
- Rationale for Change
- Email Blasts to SSC Population using HTML format (SimplyCast)
- Updated SSC Travel Website with Process Documents
- Process Change Flyer

SSC will communicate with the entire SSC population on three separate occasions via HTML E-blasts using SimplyCast. These email blasts will occur on August 12, August 19, and September 3. The first two will alert the population to the impending process change and will include the first four (4) documents listed above as attachments. The final email blast will be sent on the “Go Live” date of September 3, again with the appropriate attachments as well as a link to the SSC Travel Website where the documentation will be located. The training documentation (listed in the General Training Plan section below) will also be linked to the website. Adam Husslein (Central HR) will handle the development and implementation of the SSC Travel website page.

A Process Change flyer including critical information regarding the new Travel & Expense Authorization Form will be provided to post and distribute campus mailboxes to alert all individuals of the upcoming process change. A similar poster-sized flyer will also be created (11X17) for distribution to units for posting in critical locations (business offices, mailrooms, etc.) These materials will also be available electronically on the website for download, as needed, by all affected parties.
General Training Plan

There will be several documents created to facilitate the training of the new Travel & Miscellaneous Expense Form and E-Reimbursement process:

- KB- Screenshot “How to” of TMEA Form
- KB- Assigning Alternate for E-Reimbursement Submission

These materials will be shared at all training sessions listed below and pdf versions will be available at any time on the SSC Travel Website for download.

E-Reimbursement/Travel Policy Training: Thursday, August 8, Engelmann 242/248

This session will provide key SSC staff the most updated information regarding any recent changes to travel and e-reimbursement policies.

SSC Super-User Training: Wednesday, August 7, Enderis 1024

This training session will allow 1-3 key personnel in each S/C/D “hands-on” experience with the new Travel and Misc. Expense Authorization form.

SSC Population-Staff Trainings: August 13, 1-3pm, Enderis 1024
August 15, 8-10am, Enderis 1024

These training sessions will be available for all students and staff in the Shared Services population (non-faculty). A presentation will be followed by open lab time for individuals to navigate the new form and ask questions of BFS/SSC staff regarding the new authorization form and e-reimbursement process.

SSC Population-Faculty Trainings: August 20, 2-4pm, Enderis 724
August 22, 10am-12, Enderis 1024

These training sessions will be available for all faculty in the Shared Services population. A presentation will be followed by open lab time for individuals to navigate the new form and ask questions of BFS/SSC staff regarding the new authorization form and e-reimbursement process.

SSC Population-General Trainings: August 27, 1-2pm, Enderis 1024
August 28, 10-11am, Enderis 1024
August 29, 2-3pm, Enderis 1024

These training sessions will be available for all faculty, staff, and students in the Shared Services population. A presentation will be followed by open lab time for individuals to navigate the new form and ask questions of BFS/SSC staff regarding the new authorization form and e-reimbursement process.
S/C/D Specific Communication & Training Plans

School of Education

- Include flyers in onboarding materials, particularly for Ad Hoc hires. Work with HRBP to coordinate.
- Attend department meetings to share information regarding the new Expense Authorization process.
  Dates/Times TBD
- 1:1 training session for key faculty/staff that are identified as frequent users (based upon TER data from FY19). Specific names and meeting times TBD.

Helen Bader School of Social Welfare

- Include flyers in onboarding materials, particularly for Ad Hoc hires. Work with HRBP to coordinate.
- 1:1 training session for key faculty/staff that are identified as frequent users (based upon TER data from FY19). Specific names and meeting times TBD.

Zilber School of Public Health

- Provide links to materials on website ASAP for inclusion in fall orientation sessions.
- Attend 9/20 Faculty/Staff Meeting @ ZSPH (time TBD) to share information regarding the new Expense Authorization process.
- 1:1 training session for key faculty/staff that are identified as frequent users.

College of Health Sciences

- 1:1 training session for key faculty/staff that are identified as frequent users (based upon TER data from FY19). Specific names and meeting times TBD.
- Expense Authorization Form Process Presentation during the CHS AY20 Kickoff meeting on Thursday, August 22, 2019, 9:30am.
- Expense Authorization Form training session for CHS Outreach Program Ad Hocs.
- Link to the CHS website for the EA Form and procedures.

College of Nursing

- Provide links to materials on website ASAP for inclusion in fall orientation sessions.
- Attend August 23 Faculty/Staff Meeting, 10am to share information regarding the new Expense Authorization process.
- 1:1 training session for key faculty/staff that are identified as frequent users.

FAA

- Email faa-all@uwm.edu with process change information.
- Process change documents and update provided at FAA Directors Meeting
- 1:1 training session for key faculty/staff that are identified as frequent users (based upon TER data from FY19). Specific names and meeting times TBD.