



Connect and Collaborate

Training Conference

May 2-5, 2016

Embassy Suites by Hilton - Orlando North

225 Shorecrest Drive, Altamonte Springs, FL 32701

Conference Agenda

Track 1	Human Resources and Payroll
Track 2	Budget and Accounting
Combined	All Attendees

SUNDAY, May 1, 2016

5:00 pm - 6:30 pm	Conference Check In and Registration - Lobby/Atrium
6:00 pm - 7:00 pm	Meet and Greet with JAC and your Colleagues - Lobby/Atrium

MONDAY, May 2, 2016

8:00 am - 5:00 pm	Conference Check In and Registration - Lobby/Atrium	
9:00 am - 9:10 am	(A) Welcome and Introductions - <i>Rip Colvin, JAC Executive Director</i>	
9:10 am - 11:40 am	(B) BOMS Training - Part 1 - BOMS Administration - Security Administration, Administrative Set-Up of: Accounting, Personnel, Timesheets, Inventory, Electronic Signatures, Travel, including Live demonstrations. Topics will cover Best Practices, Workflow, Separation of Duties, and Making BOMS work for Your Office <i>Debbie Stanbro, SA20 Executive Director, Rosemarie Mitchell, SA20 HR Director, Robin McCarley, SA20 Finance Director, JAC Operations and Financial Services staff.</i> (Tracks/Rooms Combined)	
1:00 pm - 4:30 pm	(C) BOMS Training - Part 2/Track 1 - Personnel - Employee Set Up, Leave Reports, HR Policies - Tracking and Access in BOMS, PARs, Position Descriptions, Leave Accruals <i>Debbie Stanbro, SA20 Executive Director, Rosemarie Mitchell, SA20 HR Director, Brian Solka, PD6 Administrative Assistant (Room A)</i>	(D) BOMS Training - Part 2/Track 2 - Accounting, Budget, & Inventory: Including Reconciling BOMS to FLAIR, Budget and Adjusting Entries, BOMS Authorizations, Using Scanners to Perform Inventory, Separation of Duties, Travel Module, Live Demonstrations - <i>Robin McCarley, SA20 Finance Director, Wanda Moore, Administrative Assistant II, CCRC-M, Delores Terzick, PD6 Director of Finance & Accounting, and JAC Financial Services and Operations Staff (Room B)</i>
5:30 pm - 6:30 pm	Meet and Greet with JAC and your Colleagues - Lobby/Atrium	

TUESDAY, May 3, 2016

8:00 am - 5:00 pm	Conference Check In and Registration - Lobby/Atrium	
8:30 am - 9:00 am	(E) Conference Kick Off: Welcome, Introductions, Conference Overview <i>Rip Colvin, JAC Executive Director (Tracks/Rooms Combined)</i>	
9:00 am - 10:15 am	(F) Overview and History of JAC, Leadership and Internal Controls, Separation of Duties, Authorized Signatures, Executive Leadership and Focused Staff Training <i>Rip Colvin, JAC Executive Director (Tracks/Rooms Combined)</i>	
10:15 am - 10:45 am	Morning Break	
10:45 am - 12:00 pm	(G) Track 1 - Hiring of New Employees, Insurance Benefits, Personnel Action Requests (PARS), & more - <i>Carolyn Horwich, JAC Director of Human Resources and JAC Human Resources Staff (Room A)</i>	(H) Track 2 - Overview of Budgeting: Legislative Budget Requests, Trust Funds, Budget Amendments, Posting Budget in LAS/PBS and FLAIR & more - <i>Yvonne Enoch, JAC Director of Budget and JAC Budget Staff (Room B)</i>

TUESDAY, May 3, 2016

12:00 pm - 1:15 pm		Lunch Break	
1:15 pm - 2:45 pm		(I) Track 1 - People First Training: Navigation, Verifying Data, Running Reports, Requests To Fill Positions (RFT), Mass Upload - <i>JAC Human Resources Staff (Room A)</i>	(J) Track 2 - FLAIR System Overview and Demonstration: Vendors, Vendor Issues, Substitute W9, Account Balances, Paid Warrants, Vendor History, FLAIR Website Resources & more - <i>JAC Accounting and Financial Services Staff (Room B)</i>
2:45 pm - 3:00 pm		Afternoon Break	
3:00 pm - 4:30 pm		(K) Track 1 - Family and Medical Leave Act (FMLA), Employee Benefits, Military Leave, Leave Issues <i>JAC Human Resources Staff (Room A)</i>	(L) Track 2 - The "Life Cycle" of a Batch: Submission to JAC through Payment including: Do's & Don'ts, Tracking Payments, Secure Submission to JAC, Reference Guide to State Expenditures, Due Process & Operations - <i>JAC Accounting Staff (Room B)</i>
5:30 pm - 6:30 pm		Meet and Greet with JAC and your Colleagues - Lobby/Atrium	

WEDNESDAY, May 4, 2016

8:00 am - 5:00 pm		Conference Check In and Registration - Lobby/Atrium	
8:30 am - 10:00 am		(M) Travel Expenses and Purchasing Card Overview (PCard)*: Travel Authorizations & Reimbursements, Best Practices, DFS and Statutory Requirements, Samples, and more. PCard Administration, Policies, Charge Approvals, Charge Reviews, FLAIR Demonstrations and more <i>JAC Accounting and Financial Services Staff (Tracks/Rooms Combined)</i> *Attendance at this training will fulfill PCard training requirements.	
10:00 am - 10:30 am		Morning Break	
10:30 am - 11:30 am		(N) State of Florida Public Records Overview and Best Practices - <i>Pat Gleason, Special Counsel for Open Government, Office of the Attorney General (Tracks/Rooms Combined)</i>	
11:30 am - 12:00 pm		(O) JAC Public Records Request Policy Overview - <i>Cris Martinez, JAC General Counsel (Tracks/Rooms Combined)</i>	
12:00 pm - 1:30 pm		Lunch Break	
1:30 pm - 3:00 pm		(P) Track 1 - Retirement Overview and Guidelines <i>JAC Human Resources Staff (Room A)</i>	(Q) Track 2 - "Cracking the Codes" FLAIR Codes Overview: 29-Digit Account Codes, Object Codes, Organization Codes, Transaction Codes, General Ledger Codes, & more - <i>JAC Financial Services and Accounting Staff (Room B)</i>
3:00 pm - 3:30 pm		Afternoon Break	
3:30 pm - 5:00 pm		(R-1) Track 1 - Risk Management Workers' Comp., Casualty Ins., Property Ins. <i>Operations Staff -3:30-4:30 (Room A)</i>	(S) Track 2 - FLAIR Accounting Reports via RDS: Printing and Viewing Reports; Reading, Interpreting, and Understanding Reports; Reconciliations using FLAIR reports <i>JAC Financial Services Staff - 3:30-4:30 (Room B)</i>
		(R-2) Track 1- Emergency Management - <i>JAC Exec. Office Staff-4:30-5:00 (Room A)</i>	
5:30 pm - 6:30 pm		Meet and Greet with JAC and your Colleagues - Lobby/Atrium	

THURSDAY, May 5, 2016

8:30 am - 9:30 am	<p>(T) Track 1 - Payroll Processing Overview: Payroll Issues, Overtime Rules, Deadlines, Payroll Calendars and more <i>JAC Human Resources Staff (Room A)</i></p>	<p>(U) Track 2 - Governmental Accounting Cycle from Budgets to Year End: Including: Revenue Processing, Trust Funds vs. General Revenue Funds, Year End Overview, Journal Transfers, & Certifications Forward (CF) (new process) - <i>JAC Budget and Financial Services Staff (Room B)</i></p>
9:30 am - 9:45 am	Break	
9:45 am - 11:15 am	<p>(V) Track 1 - Understanding FLAIR Payroll Reports <i>JAC Human Resources Staff (Room A)</i></p>	<p>(W) Track 2- Contracts & Florida Accountability Contract Tracking System (FACTS) - Contract Payment Requirements and DFS Auditing Standards and Practices - <i>Mark Merry, Chief, Bureau of Auditing, Department of Financial Services (DFS) (Room B)</i></p>
11:15 am - 12:00 pm	<p>(X) Conference Wrap - Up Including: Florida PALM Overview (FLAIR Replacement); Concluding Remarks, Ask JAC Staff (Q & A), Door Prizes <i>Rip Colvin, JAC Executive Director and JAC Staff (Tracks/Rooms Combined)</i></p>	

Presenters and Contributors Include:

- Rip Colvin, Executive Director, Justice Administrative Commission
- Cris Martinez, General Counsel, Justice Administrative Commission
- Carolyn Horwich, Director of Human Resources, Justice Administrative Commission
- Wayne Meyer, Director of Operations, Justice Administrative Commission
- Vicki Nichols, Director of Accounting, Justice Administrative Commission
- Dina Kamen, Deputy Director of Accounting, Justice Administrative Commission
- Yvonne Enoch, Director of Budget, Justice Administrative Commission
- Michael Mauterer, Director of Financial Services, Justice Administrative Commission
- Nona McCall, Deputy Director of Financial Services, Justice Administrative Commission
- Andy Snuggs, Deputy Director of Human Resources, Justice Administrative Commission
- Susie Kalous, Professional Accountant I, Justice Administrative Commission
- Greg Cowan, Senior Management Analyst, Justice Administrative Commission
- Jamie Johnson, Senior Human Resources Coordinator, Justice Administrative Commission
- Jennifer Henderson, Senior Human Resources Coordinator, Justice Administrative Commission
- Amy Maros, Human Resources Coordinator, Justice Administrative Commission
- Kevin Garland, Senior Human Resources Specialist, Justice Administrative Commission
- Lorelei Seber, Senior Management Analyst, Justice Administrative Commission
- Terrence Joyce, Operations and Management Consultant, Justice Administrative Commission
- Kelly Jeffries, Budget Analyst II, Justice Administrative Commission
- Abram Dale, Budget Analyst II, Justice Administrative Commission
- Clyde Woodbury, Professional Accountant I, Justice Administrative Commission
- Joseph Walker, Professional Accountant I, Justice Administrative Commission
- Tim Tice, Professional Accountant I, Justice Administrative Commission
- Patricia Burt, Professional Accountant I, Justice Administrative Commission
- Hanz Cadet, Professional Accountant I, Justice Administrative Commission
- Kathy McCabe, Professional Accountant I, Justice Administrative Commission
- Phyllis Reed, Professional Accountant Supervisor, Justice Administrative Commission
- Rinesha Jackson, Professional Accountant I, Justice Administrative Commission
- Kim Jackson, Accounting Specialist, Justice Administrative Commission
- Mark Merry, Chief, Bureau of Auditing, Department of Financial Services
- Pat Gleason, Special Counsel for Open Government, Office of the Attorney General
- Debbie Stanbro, Executive Director, Office of the State Attorney, 20th Judicial Circuit
- Robin McCarley, Finance Director, Office of the State Attorney, 20th Judicial Circuit
- Rosemarie Mitchell, Human Resources Director, Office of the State Attorney, 20th Judicial Circuit
- Wanda Moore, Administrative Assistant II, Capital Collateral Regional Counsel, Middle Region
- Brian Solka, Administrative Assistant, Office of the Public Defender, 6th Judicial Circuit
- Dr. Delores Terzick, Director, Finance and Accounting, Office of the Public Defender, 6th Judicial Circuit