

DASH Institutional Workgroup – Check-in – 032525 - Minutes

Attendees: Judi Waldrip, Chandra West-Alston, Jonathan Lawshe, Keysha Fuller, Wesley Byerly, Ammar Ammar, Benjie Harmon, George Ninan, Keysha Fuller, Mike Ebbs, Lisa Hall, Amanda Fryer

Meeting notes

Introduction of New Members: Chandra introduced new members Lisa Hall and Amanda Fryer, who represent the maintenance side of the DASH implementation. Lisa explained their roles and the modules that the Facilities staff use, including Maintenance, Projects, and Procurement.

Purpose of the Meeting: Benjie explained the purpose of the meeting, which is to address and accumulate issues with the DASH system, share information, and escalate issues to the UT System office if necessary.

DASH Page Updates: Chandra discussed the updates made to the DASH page on the <https://uthsc.edu/dash/> website, including a place for people to ask questions, FAQs, and updates on the current status of questions.

Effort Certification Question: Chandra and Wesley discussed a question about effort certification, with Wesley clarifying that effort certification is changing and they are awaiting further guidance from the UT system.

Leave Balances on Pay Slips: Chandra mentioned a user who asked for leave balances to be included on pay slips but later discovered it was available in DASH, so the request may not be necessary.

Training: Team discussed training opportunities and the need to disseminate the training to larger groups for broader understanding.

Meeting with Dr. Kevin Freeman's Group: Keysha shared that they had a meeting with Dr. Freeman's group to discuss their concerns, including issues with orders being shipped to the wrong addresses, internal workflow timelines, and approvals. Additional topics included: Access to Grant Accounts and Effort Certification Process.

Standardizing Procurement Processes: Discussed the need to standardize procurement processes across colleges and departments, as some departments have centralized access while others allow individual shoppers, leading to inconsistencies.

User Challenges: There are still significant user challenges in DASH including ordering from the marketplace, lack of notification to approvers on marketplace orders, approval requests for large invoices with multiple charges for different departments, approval requests for part of the invoice,

and lack of a general ledger to reconcile expenses. There are some reports being developed that will assist in setting controls that may be lacking at this point.

Marketplace Notification Issue: An issue was raised with the marketplace where approvers are not receiving notifications for purchases, which is causing problems with tracking orders and financial transparency.

Maintenance Procurement Issues: Lisa provided an update on the maintenance side, explaining their unique procurement processes and the need to ensure accurate costing and inventory management.

Upcoming Meeting with the System: Chandra reminded the group about the upcoming meeting with the system and encouraged everyone to submit their questions ahead of time.

Communication: Focus on encouraging users to get comfortable with the DASH functionality, work through DASH challenges, and review business processes to mitigate current challenges.

Next Meeting: Thursday, 3/27/25 with UTSA Team, Raaj, and Faculty representatives from each college

Action Items

1. **Effort Certification:** Update the website and spreadsheet to reflect that effort certification is changing and that further guidance from UT system is expected. (Wesley/Chandra)
2. **Leave Balances on Pay Slip:** Keep the question about leave balances on the pay slip on the FAQ page and note that it may not be necessary as it is available on DASH Me Dashboard. (Chandra)
3. **Training:** Follow up with Jonathan regarding the training for administrative professionals and consider expanding the training to include business managers and directors. (Chandra)
4. **Workflow Timelines:** Bring up the issue of internal workflow timelines and items sitting for extended periods at the next Business Managers Meeting. (Keysha)
5. **Preparation for Thursday's UTSA Meeting:** Team to provide a list of issues to this team in preparation for Thursday's meeting with the UTSA team. (Team)