



Dave Yost • Auditor of State

TO: UAN Clients
FROM: UAN Support
DATE: July 21, 2016
SUBJECT: UAN Training Schedule

UAN will be offering continuing training classes throughout the year. These continuing training classes are optional and available to all UAN clients. The training is available in traditional classroom and online. The choice of the training format is yours. The content and material for the online training will be identical to the traditional classroom training; however, the method to perform exercises will be slightly different.

Please Note: Information about our annual Year End Update (taught each December) is not included in this communication. As with previous years the update will be presented at the Fawcett Center and online. The training schedule for the Year End Update will be released approximately six weeks before the event.

The following UAN training courses qualify for Fiscal Integrity Act (House Bill 10 & Senate Bill 6) education credits. The education credits earned for each course is denoted in the following course descriptions.

Classroom (Columbus) Training:

Location: UAN Training Room
88 East Broad Street, 9th Floor
Columbus, Ohio 43215

Hours: 9:00 AM to 4:30 PM with a 1 hour lunch break. We will be available for an additional 1/2 hour (from 4:30 PM – 5:00 PM) after the class concludes to address individual questions.

Please Note: The UAN Training room has the capacity for 15 individuals and classes will be scheduled on a first contact basis. If you cannot attend a class that you signed up for and need to cancel, please call UAN Support as soon as you know. The space reserved for you can then be given to another clerk/fiscal officer who wishes to attend that specific class.

88 E. Broad St. Columbus, OH 43215
Telephone: (800)833-8261 Fax: (877)727-0088
Email: UAN_Support@ohioauditor.gov

Online Training:

Location: Online training will be conducted over the internet. The online training class is available for you to take anywhere you have a high speed internet connection, and the computer does not necessarily have to be your UAN computer (but it can be). Speakers are also required.

Hours: 9:00 AM to 4:30 PM with a 1 hour lunch break. We will be available for an additional 1/2 hour (from 4:30 PM - 5:00 PM) after the class concludes to address individual questions. We will open each on-line session 1/2 hour prior to the beginning of the class. The purpose of this is to allow any attendee that has not previously participated in an on-line training class to verify your system is working correctly.

Please Note: UAN's online training license has the capacity for 200 individuals and classes will be scheduled on a first contact basis. If you cannot attend a class that you signed up for and need to cancel, please call UAN Support as soon as you know. The space reserved for you can then be given to another clerk/fiscal officer who wishes to attend that specific class.

COURSES

ACCOUNTING REFRESHER

This class is open to all UAN clients that would like a review of the accounting module. It is designed to take the user from the setup of accounts, budgets and other maintenance items to completing day-to-day transactions. A review of accounting reports, completing a bank reconciliation, and entering corrections using utilities will be briefly discussed. This class is particularly useful for new fiscal officers or users who feel they would benefit from a review of the accounting module. The UAN accounting refresher course qualifies for 6 education credits. The following dates have been set aside for the Accounting Refresher class:

- Online: Saturday, August 20, 2016
- Classroom: Friday, September 9, 2016

PAYROLL REFRESHER

This class is open to all current UAN payroll clients that would like a review of the payroll module. It is designed to take the user from the setup of payroll employee information to writing payroll checks and withholding checks. Payroll reports and common employee changes will also be discussed. The UAN payroll refresher course qualifies for 6 education credits. The following dates have been set aside for the Payroll Refresher class:

- Online: Saturday, August 27, 2016
- Classroom: Friday, September 16, 2016

PAYROLL NEW USERS

This class is for UAN clients that do not currently use the payroll module. It is designed to take the user from the setup of payroll employee information to writing payroll checks and withholding checks. Payroll reports and payroll conversion procedures will also be discussed. The new payroll user training course is designed for individuals who have a firm understanding of payroll concepts. We request if you do not have a firm understanding of payroll concepts, that you review our payroll prerequisite training videos before attending the new payroll users training course. The payroll prerequisite training videos are posted on our website (UANLink) at: <https://uanlink.ohioauditor.gov/training/transition.html>. The UAN payroll new user course qualifies for 6 education credits. The following dates have been set aside for a New Payroll Users class:

- Classroom: Friday, August 26, 2016
- Classroom: Friday, September 23, 2016

HOUSEKEEPING

This class is open to all current UAN clients who want increase their skills to find and correct errors and issues as they are discovered. The goal is to encourage UAN Users to manage errors and issues sooner rather than later so their year end process is not delayed or complicated by items that could have been resolved earlier in the year. The course has been separated into an accounting section and payroll section.

Please Note: The **accounting** section will be one hour and thirty minutes in length from 11:30 AM to 1:00 PM. The **payroll** section will be two hours and thirty minutes in length from 11:30AM to 2:00 PM. If you're unable to attend this training course, the course will be recorded and posted on our website approximately one week after the event. The UAN accounting housekeeping course qualifies for 1.5 education credits and payroll course qualifies for 2.5 education credits.

- Accounting Online session: Wednesday, September 14, 2016
- Payroll Online session: Wednesday, September 21, 2016

HOW TO REGISTER

To register online, please perform the following steps:

Step #1: Click the following link: <https://uanlink.ohioauditor.gov/>

Step #2: Click the 'Profile Login' button to open the login screen.

Step #3: Enter the user name and password and then click the 'Login' button to open the profile 'Home' menu. If you don't know your entity's Profile Login user name and/or password, please contact UAN Support at 1-800-833-8261.

Step #4: Select 'View Available Trainings'

Step #5: Select 'Register'

Step #6: Select your training course from the 'Select Session' drop down field, and fill out the Registration Information fields. The registration cannot be completed if any of the fields are left blank. Click 'Continue' to submit your registration for verification.

Step #7: Confirm the information is correct before the registration is finalized. If needed, click the 'Back' link and make any necessary corrections. If all information is correct, click the 'Register' button to complete the registration.

Step #8: An information page will open stating that your registration has been received by UAN and that you should receive a confirmation email within 24 hours. If you have no additional courses or participants to register, then you can close the web page by clicking the 'x' in the right corner of the page. To continue registering for additional course(s) and/or participant(s), click the 'Register' link and complete steps 6 – 8.

If you registered for an online training class:

After registering on the UANLink Profile Login page (steps 1-8 above), registration for online training includes two additional steps:

Step #9: You will receive a confirmation email that includes a link to GoToTraining – the web service UAN is using for the online course. Click the link immediately to register on GoToTraining. Your registration is not complete until you finish this step.

Step #10: Once registered on their website, you will receive another confirmation email. This email includes a 'Join' button that is required to access the course at the scheduled time. It is important to keep this email to use on the day of the training class – the 'Join' button in the email corresponds specifically to that particular class.

Please Note: Approximately 48 hours before the scheduled online course, UAN will email you the course training materials.