



# Dave Yost • Auditor of State

**TO:** UAN Clients  
**FROM:** UAN Support  
**DATE:** March 9, 2018  
**SUBJECT:** UAN Training Schedule

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Registration is now open for several UAN training classes. UAN training classes are optional and available to all UAN clients. The training is available in traditional classroom and online/webinar. The choice of the training format is yours. The content and material for the online/webinar training will be identical to the traditional classroom training; however, the method to perform exercises will be different.

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  
Key Bank Building  
88 East Broad Street, 9<sup>th</sup> Floor  
Columbus, Ohio 43215

**Hours:** 9:00 AM to 4:30 PM with a 1 hour lunch break. UAN Staff 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 contact 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.

## **Online/Webinar 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

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

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. UAN Staff 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 contact 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

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

**Please Note:** The Classroom (Columbus) Accounting Refresher classes are designed for individuals who are struggling with the UAN accounting software, thus the classes will proceed at a slower pace.

- Tuesday, April 10, 2018: Classroom (Columbus)
- Thursday, April 26, 2018: Online/Webinar
- Thursday, July 26, 2018: Classroom (Columbus)

### PAYROLL REFRESHER

The UAN Payroll Refresher class is open to all clients who are currently using the UAN Payroll software. The class is designed to take the user from the setup of new employee information to writing payroll checks and withholding checks. Also, payroll reports and common employee changes will be discussed. The UAN Payroll Refresher course qualifies for six education credits. The following dates have been set aside for the payroll refresher class:

**Please Note:** The Classroom (Columbus) Payroll Refresher classes are designed for individuals who are struggling with the UAN payroll software, thus the classes will proceed at a slower pace.

- Wednesday, April 11, 2018: Classroom (Columbus)
- Friday, April 27, 2018: Online/Webinar
- Friday, July 27, 2018: Classroom (Columbus)

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## BUDGET

**Please Note:** The UAN Budget class is a two hour course. The class time is 11:00 AM to 1:00 PM.

The UAN Budget class is open to all UAN clients who would like to review the UAN Budget software and gain a better understanding of the budgeting process. The UAN Budget course qualifies for two education credits. The following date has been set aside for the budget class:

- Friday, April 20, 2018: Online/Webinar

## HOW TO REGISTER

### Steps to Register:

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

**Step 2:** Select 'Profile Login'.

**Step 3:** Enter your username and password, and then click 'Login'. Your username is your four digit UAN entity identification number. Your password is the five-character Customer Number located on your Auditor of State invoice.

**Step 4:** Select the 'View Available Trainings' link that will open a 'Training Information' web page. Note: If you receive a message-asking if, website 'www.ohioauditor.gov' is a trusted site, select 'Yes'.

**Step 5:** Select the course you will be attending.

### Additional Registration Steps For Classroom (Columbus) Registrants:

**Step 6: (Classroom/Columbus)** on the registration website, you will see the seal of the Auditor of State, the UAN logo, and the class name, date and time.

Click **Register Now** and follow the on screen instructions to complete the registration.

**Step 7: (Classroom/Columbus):** You will receive confirmation and reminder emails from ‘UAN Support<[events@regonline.com](mailto:events@regonline.com)>’

### **Additional Registration Steps For Online/Webinar Registrants:**

**Please Note:** The online training license has a capacity limit. If you are the clerk/fiscal officer at more than one entity, please only register for one entity. Also, if you intend to participate in the webinar with more than one individual from your entity, please only register once. Individuals who attend the online training – including those that participate, but do not directly register – can earn education credits in accordance to the Fiscal Integrity Act.

**Step 6: (Online/Webinar)** Complete the ‘Register’ form (all fields are required). Click ‘Continue’ to advance to a ‘Register’ confirmation screen.

**Step 7: (Online/Webinar)** Review the registration information. If needed, click ‘Back’ to make corrections on the previous screen. When you are ready to register the attendee, click ‘Register’. The screen will return to the ‘Training Information’ web page that will include the message “Your request for registration has been received by UAN Support. You will receive a confirmation email shortly. If you do not receive an email within the next 24 hours please contact UAN Support ...”

**Step 8: (Online/Webinar)** Close the web page when finished.

**Step 9: (Online/Webinar)** Follow the instructions in the confirmation email to register on the Go-To-Training registration web site – these additional steps are required to complete webinar registration.

**Reminder:** 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.

If you have any question(s), please contact UAN Support at 1-800-833-8261 or email support at [UAN\\_Support@OhioAuditor.gov](mailto:UAN_Support@OhioAuditor.gov).