



# Mary Taylor, CPA

## Auditor of State

**TO: UAN CLIENTS**  
**FROM: UAN STAFF**  
**DATE: JANUARY 15, 2009**  
**SUBJECT: UAN CONTINUING EDUCATION TRAINING SCHEDULE**

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### Overview

UAN will be offering continuing training classes during the months of March, April, May and June. These continuing training classes are optional and available to all current UAN clients free of charge. Hands-on classes will be held at the Auditor of State's training facility located at 88 East Broad Street (**Key Bank Building**), 6<sup>th</sup> Floor in Columbus. An hour for lunch will be set aside for each class except for classes that are ½ day classes. There are several restaurants in the immediate area within walking distance of the training center. Lunch will not be provided. Travel directions, parking information, and a listing of hotels and restaurants are available on our website at: [http://uanlink.auditor.state.oh.us/training/training\\_center.htm](http://uanlink.auditor.state.oh.us/training/training_center.htm).

### Scheduling Classes

To register for classes, please mail, fax or email the attached registration form to:

Auditor of State  
Uniform Accounting Network  
88 East Broad St., 5th Floor  
Columbus, OH 43215  
Fax: 1-877-727-0088  
[uan\\_support@auditor.state.oh.us](mailto:uan_support@auditor.state.oh.us)

Class space is limited and classes will be scheduled on a first contact basis. We will contact you if the class you have selected is already full. A confirmation letter with your class registration will be sent a few days ahead of your scheduled class. ***If you can not attend a class that you signed up for and need to cancel, please call the UAN Support Line 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.*** Please note that classes may be combined or added based on the number of interested participants. Also, if you would like to come to a class not listed in this offering, please contact us, and if the demand warrants that such a class be offered, we will try to accommodate you. If you have any questions regarding the UAN training classes, please contact the UAN Support Line at 1-800-833-8261 or email support at [uan\\_support@auditor.state.oh.us](mailto:uan_support@auditor.state.oh.us).

### **Accounting Refresher**

This class is open to all UAN clients who would like to review the UAN Accounting software and have an opportunity to discuss UAN-specific accounting issues. This class is particularly useful for new clerks, fiscal officers or users who feel they would benefit from a review of the accounting software. Participants are expected to review the UAN Accounting Manual prior to coming to class. The UAN Accounting Manual is located on your system under (My Documents) and also on our website. This class is scheduled to run from **9:00 a.m. to 4:00 p.m.**

The following dates have been set aside for a UAN Accounting Refresher class:

- 1 - Wednesday, March 11, 2009 (*Note: Payroll Refresher scheduled on March 12<sup>th</sup>*)
- 2 - Saturday, March 14, 2009 (*Note: Payroll for New Users scheduled on March 13<sup>th</sup>*)
- 3 - Friday, March 27, 2009 (*Note: Payroll Refresher scheduled on March 28<sup>th</sup>*)
- 4 - Wednesday, April 22, 2009 (*Note: Day before LGOC*)

### **Payroll Refresher**

This class is open to all current UAN payroll clients who would like to review the UAN Payroll software and have an opportunity to discuss UAN-specific payroll issues. This class will consist of a discussion of each payroll area in addition to hands-on exercises. This class is particularly useful for new clerks and fiscal officers or users who feel they would benefit from a review of the payroll system. Participants are expected to review the UAN Payroll Manual prior to coming to class. The UAN Payroll Manual is located on your system under (My Documents) and also on our website. This class is scheduled to run from **9:00 a.m. to 4:00 p.m.**

The following dates have been set aside for a UAN Payroll Refresher class:

- 20 - Thursday, March 12, 2009 (*Note: Accounting Refresher scheduled on March 11<sup>th</sup>*)
- 21 - Saturday, March 28, 2009 (*Note: Accounting Refresher scheduled on March 27<sup>th</sup>*)
- 22 - Tuesday, April 21, 2009 (*Note: Accounting Refresher scheduled on April 22<sup>nd</sup>*)

### **Payroll for New Users**

This class is for UAN clients that do not currently use the payroll software or for new clerks and fiscal officers at an entity that currently uses the payroll software. The class is designed to take the user from the setup of the payroll system and employee information to writing employee payroll checks and withholding checks. Payroll conversion procedures will also be discussed. Participants must be current on the UAN Accounting Software. This class is scheduled to run from **9:00 a.m. to 4:00 p.m.**

The following dates have been set aside for a UAN Payroll for New Users class:

- 17 - Friday, March 13, 2009
- 18 - Wednesday, March 18, 2009
- 19 - Saturday, April 25, 2009 (*Note: Day after LGOC*)

### **Budget/Minutes**

This class is open to all UAN clients who would like to review the UAN budget application as well as the UAN minutes software. This class is particularly useful for new fiscal officers or users who feel they would benefit from a review of the budget and minutes systems. It is recommended to

review the budget and minutes sections of the accounting manual (Part 4 and Appendices G & H) prior to attending the class. The class is scheduled to run from **9:00 AM to 12:00 Noon**.

The following dates have been set aside for the UAN Budget/Minutes ½ day classes

- 5 - Tuesday, May 19, 2009
- 6 - Wednesday, May 20, 2009
- 7 - Thursday, May 21, 2009
- 8 - Friday, May 22, 2009
- 9 - Saturday, May 23, 2009
- 10 - Monday, June 8, 2009
- 11 - Tuesday, June 9, 2009
- 12 - Wednesday, June 10, 2009
- 13 - Thursday, June 11, 2009
- 14 - Friday, June 12, 2009

**Cemetery**

This class is open to all current UAN clients who would like to begin using the cemetery software to maintain and track their entity's cemetery records. This class will consist of a discussion of each cemetery area in addition to hands-on exercises. This class is scheduled to run from **9:00 a.m. to 12:00 p.m.**

The following date has been set aside for a UAN Cemetery ½ day class:

- 15 - Tuesday, March 17, 2009

**Inventory**

This class is open to all current UAN clients who would like to begin using the inventory software to maintain and track their entity's inventory records. This class will consist of a discussion of each inventory area in addition to hands-on exercises. This class is scheduled to run from **1:00 p.m. to 4:00 p.m.**

The following date has been set aside for a UAN Inventory ½ day class:

- 16 - Tuesday, March 17, 2009

## ADDITIONAL AUDITOR OF STATE TRAINING OPPORTUNITIES

### **Local Government Services Conference (LGOC)**

The Auditor of State's 10<sup>th</sup> Annual Local Government Officials' Conference will be held April 23rd and 24th, 2009 at the Hyatt Regency in Columbus. The conference is open to all local government officials. The conference reinforces the core fiscal and legal standards needed to run an efficient local government system. Themes of the event include:

- Government Accounting • Budgeting and Financing • Legal Compliance • Ethics • Ohio Sunshine Laws

The conference focuses on issues related to smaller local governments and satisfies continuing education requirements outlined in the Ohio Revised Code for village clerks, clerk-treasurers, and fiscal officers. Additionally, officials have the opportunity to fulfill the public records training now required by state law. Ohio elected officials, or a designee, must attend a three hour public records training session once during each term in office. All conference attendees must pre-register.

The Auditor of State's Local Government Services (LGS) section provides accounting advice to government agencies and political subdivisions in Ohio. Local government officials request the expertise of LGS to improve financial record keeping and to become better stewards of public funds.

Complete information about the conference is forthcoming. You can also make your hotel reservations now. Follow the link below and continue to check back for the forthcoming registration materials which will include online registration:

<http://www.auditor.state.oh.us/ConferenceInformation/Default.htm>

### **Certified Public Records Training**

Offered by the Ohio Auditor of State's Open Record Unit, this training is free of charge and fulfills the mandatory public records training requirement for all elected officials to attend a training session during each term of office. The Certified Public Records Training program discusses the Public Records Act, the public offices responsibilities and the rights of the public records requester. In addition, the Open Meetings Act and record retention laws will be discussed.

During regularly scheduled financial audits, the Auditor of State is required to ensure that elected officials, or their appropriate designee, have received Certified Public Records Training. The Auditor of State will also review whether the entity has implemented the new records policy provisions set forth by the law.

For further information including registration sites, dates and time:

<http://www.auditor.state.oh.us/ConferenceInformation/Default.htm>

**DO NOT USE THE UAN REGISTRATION FORM FOR THE ADDITIONAL AUDITOR OF STATE TRAINING OPPORTUNITIES. REVIEW THE REGISTRATION MATERIALS AT THE WEB SITE NOTED.**



**UAN Continuing Education Training Registration Form**

<b>Clerk Name:</b>	
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<b>Entity Id:</b>	
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*(Hint: the four digit number in your Entity Address)*

<b>Entity Name:</b>	
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<b>County:</b>	
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	Training Date - 1 <sup>st</sup> Choice	Training Date - 2 <sup>nd</sup> Choice
<b>Accounting Refresher:</b>		
<b>Payroll Refresher</b>		
<b>Payroll for New Users:</b>		
<b>Budget/Minutes:</b>		
<b>Cemetery:</b>		
<b>Inventory:</b>		

*(Note: Please put the **number, date and time** of your class selections. Also, second choice lines have been provided in case your first class choice has been filled.*

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