Blue Folder Audit Tool
Rollout of the MPathways Version

Blue Folder Brigade
February 1, 2011
February 9, 2011
Blue Folder Audits

Things to Know

• Why Do We Have To Do Blue Folder Audits?
• Who Has To Have Them?
• “Shared Services” areas are ALL in
  – Learning Management System, UMHS Finance, Contracting Office, Health System Planning, Public Relations and Marketing Communications, Government Relations, UMHS Development
• Start NOW -All employees should be audited and reported on by the end of calendar 2011
• We will be pulling data centrally each quarter and reporting it in Verge
Accessing The Audit Tool

• Access is shared with the Manage Competency page; let us know if you don’t have this
• Search options are the same as MC
• Searching by Department ID brings up a list of employees
  • Choose the correct employees
  • Select “Next In List” or “Previous In List”
• Searching by EMPLID, Campus ID or Last Name takes you directly to one employee

Blue Folder Review

Enter Department ID, or Emplid, or Last Name, or Campus ID and click Search.

Find an Existing Value

Maximum number of rows to return (up to 300): 300

EmplID: begins with
Last Name: begins with
First Name: begins with
Campus ID: begins with
Department ID: begins with

Correct History

Search  Clear  Basic Search  Save Search Criteria
How It Looks

Like the tool in Microsoft Access, the new tool contains:

• The same 9 items to document during an audit
• The same reasons for a “No” response
• A comment section
Using The Tool

- The first time you enter an employee’s page, Row 1 is automatically created.
- This is the only time you don’t need to add a row.

Blue Folder Review

Blue Folder Audit

<table>
<thead>
<tr>
<th>Employee Data</th>
<th>Campus ID</th>
<th>Service Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Kelly, Kelly</td>
<td>NAKELLY</td>
<td>04/10/1978</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Current Job Data as of Blue Folder Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmplID Empl Rec# Job Code Job Title Department ID Department Description Job Effective Date</td>
</tr>
<tr>
<td>1 71121489 0 101774 Human Resource Director 311100 UMHS Human Resources 09/01/2008</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Blue Folder Data</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Effective Date 01/28/2010 *Year 2010 Status Pending Reset Job Data</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name, Date of Hire, Job Classification Title</th>
<th>Complete: YES NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 [Front of Folder]</td>
<td></td>
</tr>
</tbody>
</table>
Using The Tool

• Answer each question with YES, NO or N/A
• The list of selections under “If No, Select all that apply” will remain grayed out when you answer YES or N/A
Using The Tool

• When you answer NO, the reasons become available for selection
• You must select at least one reason in the “If No, Select all that apply” list
Using The Tool

• When you answer NO, the reasons become available for selection
• You must select at least one reason in the “If No, Select all that apply” list

• Failure to select a reason creates an error message when you attempt to save
Using The Tool

• Use the Comments section to explain a missing item, jog your memory for a future correction or set up an explanation to an auditor.
Status of the Audit

• You can preserve your work by saving the page even though you didn’t answer each question

• Status will read “Pending”
Status of the Audit

• Status will change to “Complete “only after each question has been answered and saved.
Link Between Job Information Pages
The Blue Folder page has a link to the Manage Competency page

The Manage Competency page has a link to the Blue Folder page
Changing Entries

• If a row exists for any date in a calendar year, you cannot add another row until January 1 of the following year; instead, you will need to make changes to the existing row.
• If the status is “Pending,” you can simply make the changes and save.
Changing Entries

• To make changes when status is “Complete,” enter the page in correction mode
• Check the “Correct History” box before hitting “Search”
• When the audit page appears, you will be able to make changes to existing entries and save
• Correction mode also allows you to delete a row and start over with a new row
• Unanswered questions
Multiple Rows

When scrolling between rows, click “Reset Job Data” to display the Job Title at the time of that audit.
Requirements for Audits

• Each folder must be audited once per calendar year
• Audit results must be entered into the Audit Tool by the end of the year
• Because the tool is in MPathways, HR can query the data for our quarterly reports so you no longer need to send your completed audits quarterly
Blue Folder Audit Labs

Need help? Bring your folders and attend a lab!
They cover:

• Blue Folder requirements
• How to conduct an audit
• Entering audit data into the audit tool
• Answers to your questions
• Lab dates & locations will be announced next week