



BFA Administrative Detail: #00-7

## **ADMINISTRATIVE DETAIL ON ADMINISTRATIVE DETAILS**

### **1.0 PURPOSE**

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The purpose of this administrative detail is to document the intent behind administrative details (ADs) and their use in the Division of Business and Financial Affairs (BFA), as well as to provide guidance for preparing, maintaining, and modifying ADs.

### **2.0 BACKGROUND**

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ADs are intended to document BFA's business processes and procedures and are written to provide direction for the individual(s) implementing the administrative detail as well as BFA customers. They ensure that operations remain uninterrupted, processes maintain quality control, and there is compliance with university policies and government regulations. They can serve as a training document and can be used as a historical record of the how, why and when steps in a process are used, and when modifications have been made to that process.

### **3.0 OVERVIEW**

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This Administrative Detail outlines:

- When it's appropriate to adopt an AD
- Who has the responsibility for an AD
- The frequency with which ADs should be reviewed for updates
- The process required to adopt a new AD or revise an existing AD
- The required format for ADs
- Proper publication and storage of ADs

### **4.0 CITATIONS AND LINKS TO APPLICABLE STATE LAW, CSU POLICIES, ETC.**

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N/A

## 5.0 PROCEDURES

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### Identifying Need for New Administrative Detail

A new administrative detail must be adopted when a documented business process is specifically required by applicable law or policy.

A new administrative detail should be considered when:

- (a) a BFA department administers or will be administering a repetitive business process,
- (b) the business process is used by customers outside of the department, and
- (c) the process has not been previously documented in another AD or University policy.

### Ownership of Administrative Details

The BFA department that is primarily responsible for implementing or administering the process is the designated owner of the applicable AD. The department is responsible for drafting the AD, obtaining required approvals for the AD, reviewing the AD for updates and obsolescence, and coordinating with the Vice President's Office to ensure the AD is properly published and stored.

### Review Frequency

An AD may be updated on an as-needed basis, depending on changes to business practices or applicable law or policy.

At a minimum, each AD must be reviewed according to the following schedule to ensure it is up to date:

- (a) ADs documenting procedures or processes that are either temporary or unique to a one-time event must be reviewed at least annually;
- (b) All other ADs must be reviewed at least once every five years.

The review date based on the timelines stated above shall be counted from the date of the last review of the AD, as documented in the review history of the AD.

### Process for Adopting New/Revised Administrative Detail

1. Identify need: BFA department identifies a need for a new AD or an update to an existing AD. Alternatively, BFA department is notified by the Vice President's Office of need to review an existing AD for updates based on the five-year review schedule.

2. Map process: BFA department maps out the process or procedure, or portion of the process or procedure, to be documented in the AD.

BFA department should engage with campus stakeholders at this stage to ensure the process is fully vetted. Stakeholders include anyone who may have a responsibility under the process or who may be a customer of the process.

BFA department can also utilize the Organizational Effectiveness office to help design, streamline, and/or map the process.

3. Draft AD: BFA department drafts the AD using the then-current AD template.

If BFA department is updating an existing AD, any changes should be tracked in the document so that additions and deletions are noted.

4. Review and revise: BFA department reviews draft AD internally and with stakeholders and revises AD until the final draft is ready for approval.

5. Supervisor approval: BFA department routes AD to department supervisor for approval. The recommendation should be noted in the AD's "Approval History" section.

6. AVP approval: BFA department routes AD to Assistant/Associate Vice President for approval. The recommendation should be noted in the AD's "Approval History" section.

7. VP approval: BFA department routes AD to the Director of Strategic Operations for approval by the director and the BFA Vice President. Approval should be noted in the AD's "Approval History" section.

## Required Format for Administrative Details

All new and revised administrative details should use the latest AD template, which shall be stored for shared access in the division network drive at the following location: G:\Division of Finance & Administration\DIVISION OF BUSINESS AND FINANCIAL AFFAIRS\Administrative Detail\Admin Detail templates.

### Explanation of Template Elements

BFA Administrative Detail #: ADs are identified as follows

- 00—Organization, Communications, and Information Management
- 10—Public Safety; Environment, Health & Safety
- 20—Academic Topics
- 30—Fiscal Management
- 40—Personnel
- 50—Auxiliaries
- 60—Facilities
- 70—Business Services
- 80—Central Budget

New ADs will be assigned a number by the Vice President's Office upon full approval and prior to publication of the AD.

Purpose: Describe the reason for the AD. Include information about the specific audience (user).

Background: Provide information on what process or guideline changed that created the need for a new or revised AD. In the case of a business practice that has not been previously documented by an AD, describe the practice and why it is important to document it now.

Overview: Outline what the AD will address. Note the qualifications needed to perform the process.

Citations and Links to Applicable State Law, CSU Policies, Etc.: Cite appropriate references to law, policy, or other guidance or regulation that provides background to or support for the AD. Policies can include systemwide policies and CSUCI-specific policies. If no citations are needed, note "N/A."

Procedures: Address each item outlined in the overview. Provide the level of detail needed so someone with limited experience with or knowledge of the directive, but with a basic understanding, can successfully implement the AD when unsupervised.

Definitions: Define terms used in the AD that may not be readily understood by the user of the AD and were not previously explained in the AD.

Contacts: List the person(s) and position(s) who may be contacted for questions regarding the AD.

Revision Tracking: Updates to an existing AD should be tracked. Before publication, the Revision History should be populated with the date of revision, the name of the primary individual(s) responsible for drafting the revision, a brief summary of the revisions made, and a list, by number, of the sections revised. The Approval History box should reflect the names and dates approval was received from each of the following review levels:

- Department supervisor
- AVP
- Director of Strategic Operations
- VP

The Revision History box should reflect all prior revisions of the AD. The Approval History need only reflect the approvals for the latest version of the document.

## **Publication and Storage of Administrative Details**

Approved ADs are published on the BFA webpage <https://www.csuci.edu/vpbfa/policies.htm> and are stored on the BFA shared drive in the Administrative Detail folder (G:\Division of Finance & Administration\DIVISION OF BUSINESS AND FINANCIAL AFFAIRS\Administrative Detail). The Vice President's Office maintains a file listing of all ADs.

## **6.0 DEFINITIONS**

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AVP: Assistant or Associate Vice President

BFA: Division of Business and Financial Affairs

VP: Vice President

## **7.0 CONTACTS**

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- Director of Strategic Operations, Office of the Vice President, Division of Business and Financial Affairs
- Executive Assistant, Office of the Vice President, Division of Business and Financial Affairs

## REVISION TRACKING

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**Document Title:** Administrative Detail on Administrative Details

**Author:** Nathan Bowden, Paula Robertson

**File Reference:** G:\Division of Finance & Administration\DIVISION OF BUSINESS AND FINANCIAL AFFAIRS\Administrative Detail\Section 00--Organization, Communications, and Information Management\AD 00-7 Administrative Details

### Revision History

Revision Date	Revised By	Summary of Revisions	Section(s) Revised
5/3/2022	Nathan Bowden	First publication of AD	N/A

### Approval History

Approval Date	Approver Name	Approver Role
1/5/2022	Nathan Bowden	Director of Strategic Operations
4/4/2022	Laurie Nichols	Associate Vice President for Administrative Services/HRO
4/4/2022	Barbara Rex	Associate Vice President for Budget & Planning/Interim CFO