

dec/jan 2003-04

This month:

- Yale Employee Tuition Assistance
 - Benefits • TIAA/CREF
 - Compliance Counts
- New IT Offerings • Get Certified
 - WorkLife: Holidays
 - The Learning Center
- Orientation Corner • Procurement
 - Vendor Workflow Notifications
 - Buy-Pay • Your Career
 - Important Tax Info • YUHS



The pull-out section of **working@yale.edu**:

This handy pull-out section of your monthly **working@yale.edu** is filled with useful information. News, announcements and bulletins from the Administrative Services Division will keep you current on changes in the workplace, benefits, training and the wide range of services available to Yale University faculty and staff.

@ Yale Employee Tuition Assistance Program

Have you been thinking of going back to school – maybe improving your skill sets? The Yale Tuition Assistance Program makes it easier for you by providing financial assistance for higher education. In the past year, over 500 employees have utilized the

Tuition Assistance Program, receiving a total of \$975,000 in reimbursements. The program provides financial support as you work toward your Associate's, Bachelor's, or Master's degree. You can also work toward a Doctoral degree or take non-degree courses so long as they are job related.

All benefit-eligible employees can take courses at any accredited college or university – including Southern Connecticut State University, Gateway Community College, University of New Haven, Albertus Magnus College and others. The program also covers online courses at colleges and universities such as the University of Phoenix, Columbia University and the University of Maryland.

The reimbursement process is simple. Upon completion of a course/semester, the employee completes a tuition assistance application, attaches a copy of the grade report and itemized tuition bill to the application and submits it to the Learning Center for processing. Once the application is reviewed and processed, reimbursement will be added to your paycheck as a non-taxable payment. For non-degree courses or Doctoral degree programs, you must have your supervisor sign the application, to verify that the course is job-related.

Amount of Reimbursement Current Fiscal Year July 1, 2003-June 30, 2004				
Years of Service	Employment Status	Old Rate for C&T / S&M	New Rate for C&T / S&M	Reimbursement Rate for M&P
Less than 5	Full-time	<ul style="list-style-type: none"> • 75% of course tuition and lab fees to a max of \$417 per course • \$1,250 per fiscal year (July 1-June 30) 	<ul style="list-style-type: none"> • 75% of course tuition and lab fees to a max of \$583 per course • \$1,750 per fiscal year (July 1-June 30) 	<ul style="list-style-type: none"> • 75% of course tuition and lab fees to a max of \$1000 per course • \$3,000 per fiscal year (July 1-June 30)
5 or more	Full-time	<ul style="list-style-type: none"> • 100% of course tuition and lab fees to a max of \$833 per course • \$2,500 per fiscal year (July 1-June 30) 	<ul style="list-style-type: none"> • 100% of course tuition and lab fees to a max of \$1167 per course • \$3,500 per fiscal year (July 1-June 30) 	<ul style="list-style-type: none"> • 100% of course tuition and lab fees to a max of \$1,250 per course • \$5,250 per fiscal year (July 1-June 30)

Employees working less than full-time status, who have completed six months of continuous employment at Yale prior to the start of the course, will be prorated equal to their work hours divided by 37.5.

(continued on page 5)

2004 Flexible Spending Account (FSA) Enrollment

Flexible Spending Accounts (FSAs) enable participants to save money by reducing their taxable compensation for qualifying expenses such as uninsured health care or dependent care. The FSA annual enrollment process will be available online through December 31. You may access the website anytime during this period to renew or revise your FSA election(s) for calendar year 2004. Participation is optional and requires re-enrollment each year. In addition to electing an annual dollar amount, enrollment requires that you check the box to indicate that you have reviewed the plan rules and agree to the terms and conditions. For additional information, view the FSA enrollment brochure online at www.yale.edu/hronline/benefits/docs/oe_flex_enroll.pdf

To enroll online, go to www.yale.edu/hronline/selfservice/. Select the red button next to *My Personal Information* to connect to a screen displaying your current Self-Service options. Follow the on-screen instructions to enroll in a Flexible Spending Account for 2004. Note: If you have completed an online enrollment form, DO NOT also submit a paper form.

2003 Flexible Spending Account Claims Reminder

To be reimbursed for qualifying 2003 expenses for either uninsured medical/dental care or child/dependent care, you must submit claim forms with appropriate documentation to the Benefits Office. These expenses must be incurred and paid by December 31, 2003 and submitted to Benefits no later than February 28, 2004, to be eligible for reimbursement. Otherwise, any unclaimed balance will be forfeited.

Claim forms are online at: www.yale.edu/benefits. Click on the Forms tab on the top menu bar. Claims may be faxed to 2-7575, mailed to Yale University, Benefits Office, PO Box

208256, New Haven, CT 06520, or dropped off at 155 Whitney Ave., Room 130.

Reminder: Eligible Over-the-Counter (O-T-C) Medicines Now Qualify for 2003

Don't forget to submit receipts for eligible O-T-C expenses incurred during the full 2003 calendar year. Eligible items include medicines for colds, allergies, pain relief, or digestive ailments. More complete information is available at



www.yale.edu/hronline/benefits/flex_exphealthcare.html

If you have any questions or if any employee has a problem with the self-service open enrollment process, please email the Benefits Office at benefits.office@yale.edu or call 2-5550.

Contemplating Retirement? Here's What You Need to Know

The biggest change in Yale benefits programs this year is the improvement to the staff pension plan. The formula that was adopted in September improved pension benefits by 35 to 40 percent for staff employees. Also, for the first time, retiring staff will receive pay for 25 percent of the value of their unused sick time.

With such improvements, many staff employees are thinking more about retirement and asking a lot of questions. Here are some of the big ones:

Where will my money come from?

- The staff pension itself. With the new formula, most staff employees retiring at age 65 with 30 years of service will replace 44-45 percent of their gross salary with the pension itself.
- Social Security. Benefits can begin as early as age 62. If you're eligible to retire, full benefits can begin at age 65 or 66, depending on the year you were

born. Depending on your career and your final salary, Social Security will probably replace 35-42 percent of your income.

- Retirement savings plans and other personal savings. Most Yale employees have been contributing funds to a Supplemental Retirement Annuity (SRA). How much that's worth depends, of course, on how much you have contributed and for how long. The recent rebound in the stock market has helped many people feel better about their savings.
- Your spouse's pension and Social Security.
- Lower taxes. Retirement benefits are not subject to Social Security taxation. Social Security benefits are not taxed at all for many people.
- Fewer costs. Commuting costs go away.
- Part-time work. Most people who retire still want to stay active in some way. Volunteer work is valuable to all of us. Part-time work can also supplement income.

What about health insurance? That's more important than ever as I get older.

- If you or your spouse are under age 65, you can keep the same coverage you have now.
- Once you reach age 65, you will be covered first by Medicare and then by Yale insurance. The same is true for your spouse.

Yale retiree health benefits are among the best available. In addition, Yale will continue to provide other benefits, such as retiree life insurance, the Child Scholarship program, and ID card privileges for retirees.

A new Retirement Brochure for staff is now available online at www.yale.edu/benefits. This booklet provides valuable information about your pension payment options and the various benefits that are available to you following retirement.

Feel free to contact a Benefits Office representative to set up an appointment to discuss your options. For more information, contact the Benefits Office at 2-5550 or benefits.office@yale.edu

@ TIAA/CREF Opens Hamden Office

The Teachers' Insurance & Annuity Association-College Retirement Equities Fund is one of two University plan vendors through which you may invest your retirement and tax-sheltered savings contributions.

With clients including approximately 500 educational, research and medical institutions in Connecticut alone, TIAA-CREF recently announced the opening of a new Client Services Center in Hamden that will serve more than 55,000 pension-plan participants across the state.

"Planning for retirement entails a series of important life decisions," said Pam McNulty, director of the Hamden branch. "TIAA-CREF wants to make our expertise and resources highly accessible

to individuals and to their employers."

In addition to pensions for education and research employees, the 85-year-old nonprofit organization also offers state-sponsored college savings plans to the public and manages CHET, Connecticut's tax-advantaged plan for higher-education saving.

"This new office is an indicator of the vibrancy and importance of higher education in Connecticut and of TIAA-CREF's commitment to the professionals who provide that education," said Ms. McNulty.

For more information, visit the Benefits website at www.yale.edu/benefits, or call the Client Services Center at 203 281-2400.

@ Compliance Counts: Yale Driver Awareness Training is Now Easier Than Ever to Schedule



Driver Awareness Training is mandatory for all regular Yale drivers. Department deductibles are doubled for accidents involving drivers who have not completed Driver Awareness Training!

Regular drivers are defined as those who have the job title of driver, have the requirement of a valid driver's license as a condition of employment and either are assigned to drive a Yale vehicle, or spend 20 percent or more of their time, on average, behind the wheel on assigned Yale business.

Departments must ensure that all drivers have a valid state driver's license appropriate to the class of vehicle being driven. Any driver authorized to operate Yale vehicles, who has had his/her driver's license suspended or revoked must notify his/her supervisor and discontinue further operation of Yale vehicles until the license is returned. No one may drive a Yale vehicle with an expired or suspended driver's license.

Departments authorizing the use of their vehicles by incidental drivers must

ensure that the drivers are properly licensed and experienced.

Driver Awareness Training is now available monthly for any driver needing to complete the mandatory training. Dates, locations and registration information can be found on the Risk Management website at www.yale.edu/finance/controller/riskman/programs/driversAwareness.html

For departments with larger groups in need of training, every effort will be made to accommodate these requests by calling Peter LeMay at 2-6606.

Upon successful completion of the Driver Awareness Training, drivers will be issued a Yale University Driver's License, good for four years.

The overall goal of Driver Awareness is the prevention of preventable accidents. A Yale driver who has a preventable accident in a Yale vehicle will be required to repeat the Yale Driver Awareness Training.

A detailed description of the Yale Auto Fleet Policy is online at www.yale.edu/ppdev/policy/1705/1705.html

New Offerings for IT Computer Training @

The catalog for classes from January through June 2004 will be distributed in December. The offerings include some new classes.

Free classes

For those of you who have upgraded to **Office XP** we are offering the following free classes (For those not affiliated with Yale the fee is \$175):

Word 2002, Level I	Feb 17, 19; Apr 26, 28
Excel 2002, Level I	Jan 27, 29; Mar 2, 4; May 4, 6
PowerPoint 2002, Level I	Feb 16, 18; Apr 6, 8

Technical classes

JavaScript Basic Mar 31, June 8

This course is designed to provide web designers and novice programmers with the fundamentals of JavaScript.

Instruction will allow the student to create pages with dynamic graphics and allow user interactivity. The fee is \$215 (\$235 for those not affiliated with Yale).

UNIX System Workshop Jan 26, 27, 28

This three-day course is designed to provide participants with the knowledge and skills needed to make productive use of the basic tools and facilities in the UNIX environment. This is accomplished through a combination of lectures,

question-and-answer sessions and a considerable amount of hands-on experience through workshop exercises on the UNIX system. The fee is \$495 (\$525 for those not affiliated with Yale).

Extra Discount for Readers of working@yale:

To receive an additional 15 percent discount on these classes, simply note on your PTAE form that you've read this article. Or, if paying by check, indicate *working@yale* on your registration form.

Get Certified . . . @

Do you have the training you need to be certified in your field? Yale University's Training and Certification website can help. This site allows you to register for required courses, view and print transcripts and monitor required training.

What is the purpose of the Training and Certification website?

The Training and Certification website is the official site of the Training Management System (TMS): an innovative, comprehensive and educational initiative to help faculty and staff better understand required training and certification. The Office of the Provost established this initiative to provide the Yale Community with one comprehensive resource for training and requirement needs.

Federal and funding agencies are increasingly scrutinizing research institutions. More demanding regulations about required training, tracking and reporting are being passed and endorsed by various federal and funding agencies. Additional federal regulations have been passed, such as HIPAA, to require research institutions to identify the impacted population, provide necessary training and annual retraining and report certification fulfillment whenever requested.

All members of the Yale community should be aware of their specific mandatory certification requirements such as Bloodborne Pathogen training,

conflict-of-interest form, sexual harassment prevention training and HIPAA. There are over 200 requirement-related courses currently available on the website, with over 87,000 enrollments as of October 31.

What does the Training and Certification website allow me to do?

- Manage certification requirements
- Search and register for certification requirements
- View transcripts

Who is the Training and Certification website designed for?

All Yale University faculty, staff, post-doctorates and supervisors whose roles or responsibilities require training. Visitors of Yale University may also access and use the website.

What types of courses are available?

Transcript information and courses are currently available online for the following departments:

- Animal Care & Use Committee
- HIPAA at Yale
- Human Investigation Committee
- Medical Billing Compliance
- Office of Environmental Health & Safety
- Organizational Development & Learning Center
- Yale Medical Group
- Yale School of Medicine
- Yale University Health Services

How do I get started?

1. Point your Internet browser to the Training and Certification website: www.yale.edu/training to find up-to-date information about available courses.
2. Take the Training and Certification Assessment! This online tool will assist in determining your certification requirements. (*Note: This feature is scheduled to be available in December 2003.*)
3. Start managing your requirements and registering for courses by clicking on the *My Profile* tab. In this section, you will find information about certification requirements, course reminders, transcripts and personal data.

If you have questions, suggestions, or comments about the TMS website, please forward them to tmsadm@yale.edu, or call 2-1552.

@ WorkLife: Holidays Can Bring Joy, Happiness and Yes, Even Stress!

The holidays are quickly approaching, which means that there will be extra demands and expectations on everyone. How do most of us manage to work, accomplish all of our holiday tasks and still enjoy the season's celebrations? Holidays can bring joy, happiness, sadness and stress.



According to the American Institute of Stress, when the holidays come along, people already prone to stress can find themselves feeling somewhat blue and a little more strained than usual. Even those who do not ordinarily feel anxious under pressure can wind up feeling strained by the hustle and bustle of the holiday season. The good news is that you don't have to let stress ruin your holidays. Following are a few suggestions that should help everyone to have as enjoyable and stress-free a holiday season as possible:

- *Simplify, Simplify, Simplify* -

Minimize shopping time by making your gift list shorter. If friends or family offer to help out with cooking or decorating, let them!

- *Plan Ahead* - Take care of holiday preparations in advance so you will have more time to enjoy the celebrations. Cook and bake in advance (freeze food). Shop on weeknights when the stores are less crowded.
- *Keep the Spirit* - Hold onto the meaning of the holiday season! This helps to keep all the stress in perspective. Try to concentrate on the traditions, not the gifts.
- *Keep Your Expectations Realistic* - Expectations you create in your own mind about how perfect the holidays will be can contribute to stress during the season. Be realistic about what can be accomplished.
- *Take Care of Yourself* - Eat healthy and don't overindulge (easier said than done).

Finally, the holiday season is often a time for people to make resolutions, but

how many of us actually stick to them? If this applies to you, consider enrolling in *Lasting Resolutions parts I and II*, scheduled January 24 and February 27, respectively, at the OD & Learning Center. During these workshops you will learn about the Stages of Change, how to assess your readiness for change and helpful tips and techniques. Rather than proscribing a harsh, "just do it"-type of approach, these one-hour, lunch-time workshops will encourage you to try innovative techniques for self-change! Best of all, the classes are free and open to all members of the Yale community.

To register, or for more information, go to www.yale.edu/worklife/events
Wishing you all a healthy, happy and stress-free holiday season!

@ Tuition Assistance (continued from page 1)

The new contract settlement increases the Tuition Reimbursement benefits for clerical & technical (C&T) and service & maintenance (S&M) employees every year for the length of the contract. The first table on page 1 shows a comparison between the new and old rates for these employees and also gives the reimbursement rate for managerial and professional (M&P) staff. The second table (left) illustrates the potential annual increase for C&T and S&M employees.

AMOUNT OF REIMBURSEMENT-FISCAL YEARS FOR LENGTH OF CONTRACT (C&T S&M)			
Fiscal Year	Years of Service	Maximum Increase	Maximum Rounded
July 1, 2004-June 30, 2005	Less than 5	3.50%	\$1,800.00
	More than 5		\$3,600.00
July 1, 2005-June 30, 2006	Less than 5	3.50%	\$1,850.00
	More than 5		\$3,700.00
July 1, 2006-June 30, 2007	Less than 5	4.50%	\$1,950.00
	More than 5		\$3,900.00
July 1, 2007-June 30, 2008	Less than 5	4.50%	\$2,050.00
	More than 5		\$4,100.00
July 1, 2008-June 30, 2009	Less than 5	4.50%	\$2,150.00
	More than 5		\$4,300.00
July 1, 2009-June 30, 2010	Less than 5	4.50%	\$2,250.00
	More than 5		\$4,500.00

To learn more about the Tuition Assistance Program, please contact the Learning Center at 2-5660, email learning@yale.edu or visit the website at www.yale.edu/learningcenter

The Learning Center



IT Computer Courses

Register at www.yale.edu/learningcenter

Operating System

- (FREE)** Computers Made Easy Dec 8; Jan 21; Feb 25
- Unix (NEW) Jan 26, 27, 28
- (FREE)** Windows 2000: Level 1 Jan 27, 29
- Windows 2000: Level 2 Feb 10, 12
- (FREE)** Windows XP: Level 1 Jan 15, 16

Scheduling & Email

- (FREE)** Eudora Pro Dec 10; Jan 6; Feb 4
- (FREE)** Make Eudora Work for You Feb 18
- (FREE)** Meeting Maker Jan 21; Feb 11
- Palm Pilot Dec 3, 5; Feb 17, 19

Project Management Tools

- Project 2000: Level 1 Dec 2, 4

Microsoft Office

- (FREE)** Excel 2000: Level 1 Dec 9, 11; Jan 7, 9; Feb 17, 19
- Excel 2000: Level 2 Dec 16, 18; Jan 12, 14; Feb 24, 26

- Excel 2000: Level 3 Feb 3, 5
- (FREE)** Excel 2002 (XP): Level 1 (NEW) Jan 27, 29
- Excel Charting Feb 2
- Excel Formula & Functions Feb 27
- (FREE)** PowerPoint 2000: Level 1 Jan 13, 15
- PowerPoint 2000: Level 2 Dec 2, 4
- PowerPoint 2002 (XP): Level 1 (NEW) **(FREE)** Feb 16, 18
- Word 2000: Level 1 **(FREE)** Dec 15, 17; Jan 13, 15
- Word 2000: Level 2 Dec 2, 4; Jan 26, 28
- Word 2000: Mail Merge Dec 17; Feb 16
- Word 2002 (XP): Level 1 (NEW) **(FREE)** Feb 17, 19

Databases

- Access 2000: Level 1 Jan 20, 22
- Access 2000: Level 2 Jan 27, 29
- Access 2000: Level 3 Dec 9, 11; Feb 2, 4
- Database Design Jan 7

Desktop Publishing

- PageMaker 6.5 Jan 8
- Photoshop 6.0: Level 1 Feb 24
- Photoshop 6.0: Web Production Dec 9

Website Management/ Application Development

- Web Design: Complete Feb 9, 10, 11, 12, 13
- Web Design: Introduction to Web Technology Jan 28
- Web Design: Level 1 Creating and Maintaining a Web Page Feb 23, 25
- Web Design: Level 2 Building a Web Site Using HTML Dec 8, 10
- Web Editor: Dreamweaver MX: Level 1 Jan 14
- Web Editor: Dreamweaver MX: Level 2 Feb 18
- Internet**
- Surf the Web **(FREE)** Feb 9

Oracle Training Courses

To register, visit www.yale.edu/xtrain
Registered and approved participants are notified of the course dates and time.

Procurement

- Accuship
- CDWG Online Ordering of Computer Equipment, Software and Supplies
- Department Card Training
- Internet Procurement
- Office Supplies: Online Ordering with Corporate Express
- Purchasing Card Training
- Travel and Expense Reimbursement for Employees and Non-Employees (Distributed Authority)
- Simple Web Allocation Process (SWAP)
- VIP Number Requests and Assignments
- Web Invoice Payment (WIP)
- Procurement Inquiry

Human Resources

- C&T, Casual and Student Payroll
- Casual Employee Setup & General Employee Maintenance
- View HR Records with Salaries Responsibility (Medical School Employees Only)

General Accounting

- Custom Commitments Responsibility
- Effort Reporting and Certification
- Journal Entry/Staging Area (JSA)
- Labor Distribution (LD)
- Receipts Identification Form - Cash Receipts (RIF)

Financial Planning

- Data Warehouse Reporting for HR/LD/Payroll
- Data Warehouse Reporting for New Users
- Introduction to BrioQuery 6
- Budgets Grant and Contract Oracle Financial Analyzer (OFA)

Other Training

- User Access TAC Training
- Yale E-Travel

The Learning Center

Learning Center course schedule

To register for any of these classes and many more, visit the Learning Center at 221 Whitney Avenue, Room 104, or call 2-5660.

You can also email learning@yale.edu or visit the website at: www.yale.edu/learningcenter for cost information and course registration instructions.

FREE Mini-Workshops

The OD & Learning Center is pleased to offer the following mini-workshops at no cost to participants. Learn a quick tip, trick or technique about many technical and non-technical training topics. These lunchtime sessions are designed to give you useful and practical information in a short timeframe. During each workshop participants are introduced to a new feature or technique through a live application demonstration. Following each workshop a one-page handout is provided to reinforce the topics learned. Many of these mini-workshops are preludes to other classes at the Learning Center. Registration is required. Check out www.yale.edu/learningcenter for information.

- Customizing Clip Art
Dec 3; Jan 5
- The Dynamics of Excel
Dec 9; Feb 19
- Palm Advanced Tips
Dec 17; Feb 3
- The Yale Financial System:
Do You Know How It Works?
Jan 20

Learning Center Courses

December 2003

- Preventing Burnout Dec 2
- Creating a Career Plan
Part II Dec 2
- Business Writing Dec 3, 10
- Conflict Management
Part II: Lab Dec 3
- What is Employee Performance
and Development? Dec 3
- Fundamentals of Diversity Dec 4
- Luncheon Meditation Dec 5, 19
- Life Balance Workshop Dec 9
- Customer Service for Front Line
Service Providers Dec 9
- Talking with Parents of
Young Children Dec 10
- Preparing for the
Job Interview Dec 15, 17
- Behavioral Interviewing Dec 16

January 2004

- Communication:
Effective Listening Jan 13
- I-9 Training Jan 14
- Managing in a Union
Environment Jan 15
- Customer Service for Front Line
Service Providers Jan 21
- Lasting Resolutions I:
Successful Self-Change Jan 22

- Separation and Divorce
Through the Eyes of
Your Child, Part I Jan 27
- Getting There:
The Professional You Jan 28
- New Haven Magnet School
Information Sessions Jan 29
- Survival Reading Skills
for Busy Professionals Jan 29

February 2004

- Evening: Making Your Resume Work
for You Feb 2
- New Haven Magnet School
Information Sessions Feb 2
- How to Shop for
Summer Camp Feb 3
- Constructive Confrontation:
Dealing With the
Troubled Employee Feb 3
- Time Management for
Supervisors: Keep Important
Work First Feb 4
- Time Management for
Non-Supervisors:
Time After Time Feb 5
- Coaching Skills
for Managers Feb 5

Safety Training @

Office of Environmental Health
and Safety
135 College Street, Room 15
www.yale.edu/oehs/trainreq.htm
7-2133

- Biosafety Training
Dec 11
- Bloodborne Pathogens Initial Training
Dec 2, 17
- Bloodborne Pathogens Annual Retraining
Dec 3, 18
- Laboratory Chemical Safety
Dec 3, 18
- Non-Laboratory Chemical Safety
Dec 16
- Radiation Safety Orientation
Dec 4, 16

Web Training:
Bloodborne Pathogens
<http://info.med.yale.edu/bbp/>
Hazardous Chemical Waste Management
<http://info.med.yale.edu/chemhaz>
Laboratory Chemical Safety
<http://info.med.yale.edu/chemsafe/>

Call 7-2133 to schedule the following courses:

- Advanced Biosafety Seminar
- Noise and Hearing Conservation
- Office Ergonomics
- Respiratory Protection
- Tuberculosis Awareness



Orientation Corner

“Welcome to Yale, a diverse community achieving its mission and meeting standards of excellence through teamwork and customer service.”

The Orientation Corner brings you helpful hints, guidelines and snippets of information related to Yale history, buildings and grounds, special events and learning opportunities, as well as changes that may be occurring in the workplace. Whether you are a new or current employee, you will find this information helpful to working at Yale.

Those who haven't yet are encouraged to sign up for the New Employee Orientation program, which takes place each Monday from 8:30AM-3:30PM. Orientation is intended primarily for new employees, but existing employees are welcome on a space-available basis. For information, visit www.yale.edu/learningcenter or call 2-5660.

Dec '03 – Jan '04 – Gym Membership

Exercise is an excellent way to remain physically and emotionally healthy. Experts agree that regular exercise can reduce waistlines and stress while increasing

energy, self-esteem and creativity.

Yale offers to all staff, faculty and students the opportunity to join the Payne Whitney Gymnasium (PWG) as a member. Members at the PWG receive access to state-of-the-art exercise equipment, pools, running tracks, sports courts, saunas and much more.

How do I become a member?

Visit or call membership services today. They are located within the entry lobby from 10AM to 6PM on weekdays and 10AM to 2PM on weekends. You can reach them at 2-2474. Membership rates are quite reasonable.

Did You Know?

During the academic year, the PWG is open from 6AM to 10PM on weekdays and 9AM to 6:30PM on weekends. So, now there is no excuse not to join the gym today and begin to achieve a new you.

@ Procurement

New Vendor Setup Workflow Notifications

Using Oracle workflow technology, Procurement now has a new and better way to manage communications regarding the vendor setup process. In the past, Vendor Compliance would send one-off emails or phone the Requestor with a vendor number and site address. “Now with the use of Oracle automated workflow notifications, we can easily relay this information in ‘real-time’ to the Requestor and Approver,” explains Michelle Valerio, Manager of Procurement Systems. “In addition, our new workflow notifications will provide concise and consistent information on any action that may be required to release a vendor from hold if key information is missing,” such as a Taxpayer Identification Number (TIN) or Requestor or Approver information.

Simply stated, workflow notifications are emails sent from *Oracle Workflow*. The new process will send out an immediate notice of the status of

your request, (i.e. “New Site Created” or “Vendor Site Placed on Hold”). If more information is required to complete the request, the notice will inform the Requestor and Approver of what is needed. Subsequent reminders will be sent out as necessary until the information is collected. If the information is not received within 23 days, the vendor will be deactivated.

The Procurement Systems group, along with the ITS Administrative Systems team, plan to use the Vendor Setup Workflow Notifications project as a learning experience to aid workflow notification projects in other areas. “We recognized a great opportunity to make good use of existing workflow technology,” said Rob Bores, Procurement Systems Project Manager. Possible areas for future workflow notifications are VIP process and invoice holds management.

If you have any suggestions for the wording of these emails to make them more helpful, we would appreciate your feedback. Please contact Michelle Valerio at michelle.valerio@yale.edu.



Got software questions? IT Training has answers!

Check out the Desktop Wizard's tip of the month. Each month we'll offer a new and exciting tip, trick or short cut that will make you say, “Hey! I love my computer!”

This month's tip:

Wish you could gradually move a text box, drawn object, or Clip Art image just a fraction of an inch? Positioning objects on a PowerPoint slide can be frustrating! You can perfectly position any object, or group of objects, on a slide using the Drawing Toolbar's Nudge menu.

Follow these easy steps:

1. Select the object(s) on the PowerPoint slide you wish to reposition
2. Locate the **Draw** button on the Drawing Toolbar (if not available, then select the **View** menu's **Toolbars** option: **Drawing Toolbar**)
3. From the Draw menu, select the **Nudge** menu option relating to the direction you desire
4. Repeat Step 3 until the object(s) is carried to the desired position(s) on the slide
5. For quicker results, hold down the **CTRL** key and strike a directional key (← ↑ → ↓) on the keyboard. This method also allows you to slightly nudge the selected object(s) in any direction on the slide

You're just a click away!

Please email your questions and tips to us at learning@yale.edu. Each month a tip and question will be selected and featured here. We want to hear from you!

@ Procurement (continued)

Procurement Partners with RIS in IKON Copier Rental Program

For the past year, the Yale RIS Copier Rental Program and IKON have worked feverishly to replace 271 old analog copiers around campus with new IKON digital copiers. Nearly 100 additional machines have been installed around the University and the program continues to grow.

The partnership has thus far been a profitable one for everyone involved. The program is flexible, so long-term contracts no longer hinder technological upgrades. With the new program, you have unlimited upgrade capabilities and charges are handled centrally. Costs are fixed on the output regardless of how much toner is used or how many times the service representative needs to pay a visit. In addition to all of these benefits, new technology enables a combination of features to be offered in one economical package. Here's some information to help you choose the

copier package that's right for you:

A standard digital copier can:

- Copy and collate unlimited number of sets
- Handle customization to meet the requirements of your department such as adding a feeder, additional paper drawers, stapler, saddle finisher, hole punch, network print board and fax board

Adding the Network Print Board will allow you to:

- Print from your desktop
- Collate and duplex unlimited sets from your desktop
- Print confidential documents to your own private mailbox and password protect either the mailbox or the document
- Scan to your PC with the included Network ScanGear software

Adding the Fax Board allows you to:

- Fax documents utilizing the same feeder you use for copying or fax

- directly from your desktop
- Store incoming fax documents in memory until you decide to print them out

With the (i) Imaging Series you can:

- Scan to email or network shared folders
- Mark up and OCR scan documents with the included e-Copy suite software

Need a little help sorting out which device is right for you? Representatives are available to meet with you to analyze the printing/copying usage and the workflow of your department, recommend appropriate devices to meet your needs and show you how to save money by combining functions into one machine.

For an appointment or more information, please contact Jim Mathewson at 2-3745 or james.mathewson@yale.edu.

Recently Cancelled University-wide Contract Orders

After a vetting period during October, several University-wide Contract Orders have been cancelled due to low usage. (Please see list at right.)

What are the alternatives if you have been using one of these contracts? Consider the following:

- Buy directly from the same vendor or another vendor and use your P-Card. Go to www.yale.edu/procurement/ec/purchasecard.html for more information.
- Buy directly from the same vendor or another vendor and request an Ok-to-Pay invoice. If the invoice is within guidelines, pay at your desktop using Web Invoice Payments (WIP).

(Note: If Yale has one or more University Contracts with a vendor, this vendor is not available for processing invoices in WIP.) Need access to WIP? Go to www.yale.edu/xtrain to self-register for training.

- Use another vendor with a University-wide Contract Order for the commodity you need and pay with a VIP. See our current Contract Listing at www.yale.edu/procurement/purchase/orders/contract_orders_business.htm. Search using *Listing By Commodity*.
- Contact a buyer in Procurement for advice. Call 2-9955 or send email to procurement@yale.edu.

VENDOR NAME	UNP PO #
ADVANCED OFFICE SYSTEMS INC	1000083
ALERT SCIENTIFIC INC	1016316
AMERICAN STITCH & PRINT	1002690
AUSTIN PHILLIPS SHOE CO INC	1013362
AUSTIN PHILLIPS SHOE CO INC	1011215
BD BIOSCIENCES CLONTECH	1022279
BECKMAN COULTER INC	1000082
BELLCO GLASS INC	1000032
BRODNER GLASS CO INC	1000027
C L STURKEY INC	1000055
C L STURKEY INC	1021466
CHARRETTE LLC	1056461
CIC CORP	1048112
COLONY HARDWARE SUPPLY CO INC	1000069
DEMARTINO PACKING CO	1000018
ELM CITY CITIZEN NEWSPAPERS	1029705
ENTERPRISE RENT-A-CAR DBA ELRAC INC	1058607
GENTRA SYSTEMS INC	1066593
INNOGENEX	1019863
KAYE'S ART SUPPLY INC	1000029
LEHIGH SAFETY SHOE CO INC	1000023
LEHIGH SAFETY SHOE CO INC	1000021
MILLIPORE CORPORATION	1000062
MILLIPORE CORPORATION	1021455
NATIONAL BRO-KAR HEATING A/C REFRIGERATION INC	1016315
OLIGOS ETC INC	1000091
ORGANON TEKNIKA CORP	1000395
PFALTZ & BAUER INC	1000092
PHARMACIA & UPJOHN	1000401
RAININ INSTRUMENT LLC	1000142
RECOMBINANT TECHNOLOGIES LLC	1028978
SARTORIUS CORP	1000113
SPX CORP DBA KENDRO LABORATORY PRODUCTS	1000057
TEAM COMPUTER BAY INC	1019446
UTRECHT	1000004

Buy-Pay Approach: Purchase Orders with Matched Invoices

As a University consumer, you have many options on how you purchase your goods and services. For small purchases, shopping online with your P-Card offers you both efficiency and flexibility. However, there are times when a purchase order is the key to providing you the *best value*. A purchase order is typically used for a one-time purchase for well-defined goods or services described in your purchase requisition.

When should I use a purchase order?

You should use a purchase order when the potential dollar savings is appreciable to the University. This can be achieved through competitive bidding or buyer involvement. In addition, you should also consider using a purchase order if the potential of risk in ordering such goods or services warrants additional review and controls. Generally speaking, when a purchase is greater than \$5000, a formal purchase order is required. Commodities such as furniture (including carpeting and window treatments) or equipment that is leased or rented also require a purchase order. (For full details, please note all relevant policies and procedures at the end of this article.)

What are the advantages of going through Purchasing to order my goods and services?

- Assistance in identifying potential vendors
- Negotiation of key elements such as price, freight, warranties and discount terms
- Explanation of the details of a vendor's quote, agreements or contract terms
- Protection from the *fine print* traps hidden in many vendor proposals
- Consultation in proposal preparation and product selection including design, ergonomics and *green purchases*

Electronic ordering via the Internet is the preferred method of ordering. Not only is this method more efficient than processing a paper requisition, it is also more accurate. After the buyer turns your purchase requisition into a purchase order, a copy of the purchase order will be sent to you, the requestor and to the vendor.

Saving money and protecting the University through the creation of a purchase order is only cost effective when savings and risk potential are high. Therefore, a purchase order should only be used when those conditions are met. When the savings potential or risk is minimal, other more desirable Buy-Pay approaches should be considered. For a quick review of preferred approaches, please visit www.yale.edu/procurement/news/index.htm

Helpful Resources:

You will find the following relevant documentation at www.yale.edu/ppdev/Purchase/Purchasing.htm

- General Purchasing Policy 3210
- General Payment Policy 3201
- Purchasing Requisitions and Purchase Orders 3201 PR.1
- Verifying Receipt of Goods and Services 3240 PR.1
- Bidding and Cost Analysis 3205 PR.2
- Contracting for External Consultants and Other Professional Services Policy 3210
- Purchases of Restricted Items Policy 3220

Other Important References:

- How to Buy & Pay for Goods/Services (Online at www.yale.edu/procurement/)
- Procurement Inquiry Quick Hit (Online at www.yale.edu/hronline/busmgr/0303/)
- Internet Procurement is a new tool requiring training to gain access. To register for training, go to www.yale.edu/xtrain

A purchase order is only cost effective when savings and risk potential are high

@ Your Career: Networking

For some people, career success comes easily. They never get dissatisfied with a job and move on to the next job opportunity when they are doing



really well. These people know what they want and have a network that gives them access to the right information, opportunities and people. They have found that one of the secrets of

professional success is having your resources in place *before you need them.*

The more people you know, the more you increase your capacity, resources and perspective on your career. This *network* of persons can help you identify others in your chosen field or industry, help you tap into the unpublished job market and can even get you access to decision makers.

Networking means actively getting

to know people – developing an ever-increasing list of connections. The point of this activity is to connect with individuals who may be helpful to you at any stage of your career. Networking is also reciprocal: as your network grows, you will become a resource to others as well. It is a good idea to stay in touch so that both sides feel comfortable asking each other for assistance or advice. Keep in mind that networking is not about directly finding a job; it's about connecting with others who may facilitate potential future career change(s).

To create your own network, first strengthen your contact base. Reconnect with long lost friends and colleagues, send out an occasional email or card to let them know that you respect and appreciate them.

Next, connect with professionals – both in your field and related professions. Seek out individuals who have skills, experience and connections which may be useful to you in the future. Formal and informal network opportunities include professional

associations, colleagues and people to whom you are referred. Always ask for additional contacts.

Finally, reflect on your goals and objectives before using your network to gain access to information and people. Stating specifically what assistance you seek enables others to effectively answer your queries. For example, "I'm looking for people who are involved with marketing for environmental engineering firms in the Midwest," will get you a more helpful response than "I'm looking for a job." Be sure to send a thank-you note or email and always remember to report your progress to those who helped you.

More useful information on the do's and don'ts of networking is provided by Richard Bolles in his career guide *What color is your parachute?* Remember, the best time to create a network is *before* you need it. As the poet Georgia Douglas Johnson said, "Your world is as big as you make it."

@ The Power of Recognition

Recognition – Everyone has heard this word before, but what does it mean? According to Webster's Third New International Dictionary, recognition is *formal acknowledgement (as of a fact or claim); acceptance of an individual as being entitled to consideration or attention; acknowledgement of something done or given.*

From early childhood through adult life, everyone wants and needs to be praised; to receive some acknowledgement for a job well done. When we recognize an employee for an achievement at work, this can have a very powerful influence—not only on that individual, but on his/her colleagues as well. Beyond making an employee feel valued and needed, recognition can give that employee the motivation to perform even better on each project that is assigned. It is a way

for employers to let an employee know that he/she is a valued asset.

A survey of 1000 Canadian workers, posted on the Calgary Health Region's website, was conducted by Industry Canada. According to the survey, the top five motivators for Canadian workers were: 1) appreciation for a job well done, 2) a feeling of "being in on things," 3) help on personal problems, 4) job security and 5) high wages. Isn't it interesting that the number one motivator is recognition? When someone receives a compliment, that person can't help but feel wanted and appreciated. Appropriate recognition can be a very positive motivator. Encouraging and reinforcing positive behavior creates enthusiasm for hard work and serves as an incentive to produce even greater results. Make a person feel good about him/herself: let him/her know others appreciate the

work done and the individual will be inspired to perform more effectively.

People most often will criticize when things aren't going well. We tend to look at the negative side of things. Yet how often do we stop to acknowledge something good that has taken place? Mark Twain once said, "*I can live for two months on a good compliment.*" The more we take the time to emphasize the positive to our employees by recognizing and rewarding good performance and individual contributions, the more our employees will feel valued and appreciated. If we can implement a plan to utilize the power of recognition, just think of the possibilities of how this can change and motivate the staff in your department.

Yale Health Plan Now Offers**Evening Hours**

Effective January 6, primary care clinic hours will be expanded to include Tuesday and Wednesday evenings from 5:00-6:45.

Evening clinics in Internal Medicine, Obstetrics and Gynecology, Student Medicine and Pediatrics will be available for a limited number of walk-in visits as well as for scheduled appointments. Ancillary services such as radiology, pharmacy and the clinical laboratory will also be open to provide full services to our members.

With this plan, over 20 additional clinic hours per week will become available. In addition, by offering evening hours, we expect to reduce daytime congestion in the clinics. More of our rapid access slots will become available during the day. Both patients and clinicians will benefit from greater available space in the clinics and enhanced efficiency of clinic flow.

2003 YUHS Holiday Recess Hours

Primary Care and
Administrative Departments
Dec 24, Dec 31 (8:30AM - 12:30PM)
Dec 29, Dec 30 (8:30AM - 5:00AM)

Laboratory
Dec 24, Dec 31 (8:30AM - 12:30PM)
Dec 29, Dec 30 (8:30AM - 5:00PM)

Radiology
Dec 24, Dec 31 (9:00AM - 1:00PM)
Dec 29, Dec 30 (8:30AM - 5:00PM)

Pharmacy
Dec 24, Dec 31 (8:30AM - 3:30PM)
Dec 26, Dec 29, Dec 30
(8:30AM - 5:30PM)

Specialty Departments
Call each department for its holiday schedule.

Urgent Care
Care for urgent problems is available after-hours, weekends, and holidays in the urgent care department.

The Word(s) on Menopause

Yale Health Plan's popular lecture/discussion series on menopause, featuring a variety of topics presented by clinical specialists, will be held on January 14, 21 and 28 (all Wednesdays). Lunch will be provided for the January 14 and January 21 events, which will be held in the President's Room in Woolsey Hall (corner of College and Grove Streets). The January 28 event is at 6:00PM (light snacks will be provided), in the President's Room in Woolsey Hall. The events are free, but RSVP's are required. To RSVP or for more information, call



the YUHS Health Promotion and Education Department at 2-1826. Watch for more information posted at the YUHS building and on our website at www.yale.edu/uhs

Wednesday, January 14 at noon.
Ann Ross, MD, will discuss Hormone Replacement Therapy: The Latest News.

Wednesday, January 21 at noon.
Linda Bell, MS, RD, CD/N, will discuss nutrition and menopause. Ivy Alexander, PhD, C-ANP, will discuss Menopause Management: The Road Not Taken – a look at alternative strategies for managing menopause symptoms.

Wednesday, January 28 at 6:00PM
David Roth, MD, will discuss "Navigating Menopause: Men, Myths and Mysteries." Partners are welcome.

Important Tax Information @**Tax Treaty Forms 8233, W-8BEN and W-9 2004 Update**

Any non-U.S. citizens who are currently claiming a reduced federal income tax withholding rate (including a full exemption from withholding) on payments pursuant to a tax treaty may need to complete updated tax forms for the calendar year 2004.

The Forms 8233, *Exemption from Withholding on Compensation for Independent Personal Services of a Nonresident Alien Individual*, are only valid for the tax year for which they are filed. Current Forms 8233 will expire December 31, 2003.

The Forms W-8BEN, *Certificate of Foreign Status of Beneficial Owner for United States Withholding*, are effective for three calendar years. Forms

W-8BEN filed in the calendar year 2001 will expire December 31, 2003.

The Forms W-9, *Request for Taxpayer Identification*, are used to claim tax treaty benefits by a resident alien for tax purposes. When the form is used to claim tax treaty benefits, the form must be updated annually with respect to wages, and every three years for fellowship or stipend payments.

All individuals who are currently claiming a reduced withholding rate pursuant to a tax treaty and whose exemption forms will expire December 31, 2003 (i.e., those who filed a 2003 Form 8233 or a Form W-8BEN in the calendar year 2001) will be notified by letter or email. The letter will instruct

those individuals to schedule an appointment and meet with the University International Tax Office prior to December 19 to file updated treaty election forms.

Individuals may schedule appointments by visiting the International Tax Office website at www.yale.edu/tax/int and clicking on *Appointments* in the list of options. Appointments will be held through December 19. For further information, contact the University Tax Office by calling 2-5530 or 2-5597, or by email: jodie.stewart-moore@yale.edu or daysi.cardona@yale.edu.