

UNIVERSITY BUSINESS TRAINING

Participant Quick Reference Guide

University Business Training (UBT) is a competency based training initiative providing the basic knowledge, skills and abilities that university business administrators need to be successful in their jobs.

You are required to complete the University Business Training Certificate if:

1. You have a title of Unit Business Manager or Unit Financial Manager
2. You are a Budget Coordinator, or
3. You are responsible for at least two of the following: budget transfers, budget preparation, or ProCard approvals as indicated by PeopleSoft security clearance.

Required Courses

The core curriculum is comprised of a blended online and classroom learning approach, unless otherwise indicated. Online modules must be completed before attending the classroom sessions. There are 10 required classes in the UBT core curriculum. A description of those classes can be found in the "Participant Completion Checklist" on page 3.

Additional Requirements to Complete Certification

General Electives

The purpose of the UBT General Electives is to round out the technical learning with some of the general skills and knowledge that are vital to successful professionals. Technical, interpersonal, and thinking skills are the categories targeted by the general electives requirement. You are encouraged to select training that is relevant to your needs.

1. Eighteen (18) contact hours of general electives are required to meet UBT Certification requirements.
2. You may choose to take selected Delphi Center professional development workshops at the discounted rate of 50% for university employees. For more information or to register, please visit: <https://louisville.edu/professionaldevelopment/seminars>
3. Other training that occurred within 6 months prior to your registration may be considered as a general elective in the program. You can submit a class outline and proof of attendance to the UBT program manager, John Spence at john.spence@louisville.edu for review. Approval will be based on relevance of content and number of contact hours indicated by proof of attendance.

Maintaining Your Certification

Continuing University Business Education

After completing the certificate program, you will be required to complete one UBT Continuing Education event every two years to maintain your certification. This requirement is in place to provide critical updates, encourage study in relevant areas, and to continue developing work-related knowledge, skills and abilities on an ongoing basis. A UBT Continuing Education event will be offered annually. Please visit the UBT website for additional details and registration information.

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Quarterly Reports to Management

Your supervisor and department leadership will receive a quarterly report on your progress.

Testing

In order to successfully complete a course, you must pass a quiz following each online module with a score of 85% or higher. You will have three attempts to pass the quiz and must do so prior to attending the classroom session. You will also be expected to complete a written examination for each course, with the exceptions of University 101 and HR Overview. The open book written examination is administered at the end of each classroom session. If you are unsuccessful, you will be given guidance on which content to review and another chance to pass the test. If you need a third attempt at the examination, you will be referred to a subject matter expert in that area for additional review or coaching.

We are committed to providing quality learning experiences and the support you need to be successful in the program.

Testing Out of a Course

You are allowed to test out of any University Business Training course except University 101, HR Overview and Fraud Prevention. To test out of a UBT class, you must receive at least 85% on a one-time proctored exam. This is a comprehensive written examination over course content and is administered by Testing Services. Test out attempts must be completed prior to accessing the online modules or quizzes for that class. Contact Testing Services at 852-6606 to schedule a testing session, and please specify that you would like to take the Test Out exam for the class.

Attendance

You are expected to attend all scheduled classrooms sessions. If you need to miss a scheduled class, you must email the UBT service account at ubt@louisville.edu or contact Alex Bryant at 852-4620.

Additional Resources

There is additional information found at the UBT website:

<https://louisville.edu/professionaldevelopment/internal/ubt>

Contacts:

University Business Training Service Account: ubt@louisville.edu

Alex Bryant, Participant Support: 852-4620 alex.bryant@louisville.edu

John Spence, Program Manager: 852-8855 john.spence@louisville.edu

Virginia Denny, Director of Professional Development: 852-5581 virginia.denny@louisville.edu

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Participant Completion Checklist

Core Curriculum Checklist

Online Class Complete	Classroom Complete	Class Description	Classroom Date
☐	☐	University 101 - an introduction to University systems, governance and technology.	
☐	☐	Information Security and Technology - covers ethics, information security and other elements necessary to assure sound internal control practices.	
☐	☐	Financial Administration - covers the critical knowledge, skills and abilities needed to navigate and use the Financial Systems.	
☐	☐	Budget and Position Management - addresses developing and working with a budget, position management and other key elements for the UBA.	
☐	☐	Procuring and Paying for Goods and Services - covers the elements of purchasing as well as certain Controller's Office functions necessary to procure and pay for goods and services.	
☐	☐	Gifts and Sponsored Programs - covers the roles and responsibilities of the UBA in the areas of grants and industry contracts.	
N/A	☐	HR Overview - provides an orientation to the state of HR at UofL. (Classroom only)	
☐	☐	Employment and Compensation - covers functions of hiring and orientation with new department employees.	
☐	☐	Employee Relations and Salary Administration — addresses issues of employee rights, performance management, and related policies and procedures, as well as benefits and salary administration guidelines.	
☐	☐	Fraud Prevention - addresses issues of identifying, preventing, and responding to fraud.	

General Elective Requirement for Full Certification Participants (18 Hours Required)

Hours	Class Description

Please contact John Spence (john.spence@louisville.edu) for General Elective Submissions.