

## Huron Activity Study Catalog

The following document outlines functions and activities included in the Huron Administrative Activity Study. The contents are subject to change as project needs arise.

To view the activities and sub-processes for a function, simply select the function from the list of functions below.

To return to the table of contents from any function, click “Return to Functions List” below each table. It is recommended that you review this document in advance of completing the online assessment and have it available for reference throughout

In the online assessment, you will only be asked to allocate time to the Functions and bolded Activities below. You will NOT be asked to allocate time to the sub-processes listed below each blue row; those elements are included to help define the activities and functions, they are not expected to be exhaustive.

### Huron Administrative Activity Study Functions

1. Instruction / Research / Clinical Care (Intended for Faculty, Principal Investigators, Researchers, and
2. General Management and Administrative Support .....
3. General Finance, Accounting, and Billing .....
4. Procurement, Travel & Expense, and Accounts Payable .....
5. Patient Access and Clinical Support Services .....
6. Research Administration .....
7. Human Resource Management (Including Benefits & Payroll) .....
8. Marketing & Communications .....
9. Information Technology .....
10. Enterprise Risk Management, Audit, and Compliance (Non-research / Not Including Student Conduct) .....
11. Enrollment Management .....
12. Alumni Affairs, Development, and Advancement .....
13. External Reporting (Non-financial / Non-sponsored) .....
14. Academic Program Support (Advising, Course Scheduling) .....
15. Student Services .....
16. External Relations .....
17. Other .....

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### Instruction / Research / Clinical Care (Intended for Faculty, Principal Investigators, Researchers, and Providers)

Instruction, Research, and Clinical Care	
	Direct instruction to students for credit, instructor of record
	Direct research activities associated with sponsored project (named on grant, conducting research for PI, research writing, conducting research)
	Provide clinical care to patients

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### General Management and Administrative Support

Supervisor Administration	
	Provide staff direction and guidance on department policies, procedures, and tasks
	Approve and review employee time
	Direct daily activities and provide guidance on work
	Conduct performance evaluations for staff who report to you
	Set and track objectives
	Provide on the job training and guidance
	Develop and manage programs for faculty and staff recognition
	Support performance management process, such as creating, administering, and collecting forms (and provide advice, counsel, etc.)
	Provide coaching and mentoring for staff
	Supervise and train student hourly workers
	Approve and review student worker time
	Manage federal work study opportunities and ensure compliance
	Coordinate student hourly work to match deadlines of academic year cycle
	Ensure students are complying with policy guidelines for work vs classroom time
	Ensure students are complying with FLSA regulations
Unit Effectiveness/Improvement	
	Develop organizational strategy and implementation plans
	Perform organizational assessment through quantitative and qualitative methods
	Design and facilitate system, process, or policy improvement initiatives
	Develop unit or program goals
	Conduct review of unit or program progress
	Manage organizational changes
Administrative Support	
	Serve as receptionist for unit
	Respond, on behalf of department, to calls and emails from faculty, students, patients, and others
	Follow up on requests made to central functions, such as Facilities
	Initiate departmental requests to other offices such as HR, Finance, IT, and Facilities
	Relay messages and requests to appropriate personnel
	Serve as general problem solver for front line responsibilities related to unit mission (e.g., student, patient, grant, or faculty related)
	Manage internal communications vehicles (e.g. emails, newsletters, etc.)
	Perform calendar management
	Maintain office supplies inventory (excluding storeroom inventory)
Space Scheduling and Reservations (does not include enterprise classroom management)	
	Help plan and manage physical space for unit
	Manage classroom space and departmental common areas (e.g., conference rooms, seminar rooms)
	Coordinate access to labs and collaborative spaces
	Schedule and coordinate meetings
	Coordinate space reservations
	Coordinate and serve as point of contact for unit moves
Project Management	
	Develop project plans
	Monitor and track project plan progress
	Create status reports and provide updates to leadership



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	Develop organizational strategy and implementation plans
	Design and facilitate system, process, or policy improvement initiatives
	Develop and manage organizational readiness and change management
<b>Event Coordination, Scheduling, and Logistics</b>	
	Plan and coordinate internal and external event logistics (e.g., venue, food, equipment, etc.)
	Prepare event communications (invitations, posters, handouts, etc.)
	Coordinate RSVPs and reservations for events
	Review institution contracts and assist with contract development (i.e., specific to events)
	Manage public and media relations associated with external events
<b>Volunteer and Affiliate Management</b>	
	Supervise and train volunteers
	Coordinate and track volunteer time
	Coordinate volunteer schedules
	Ensure volunteers are complying with HIPAA and other relevant policies
<b>Intra-day Transit</b>	
	Transit to and from work activities, between arriving to worksite for the day and leaving last worksite for the day (e.g., walking, biking, utilizing campus transportation, etc.)
<b>Other General Management and Administration Support Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### General Finance, Accounting, and Billing

<b>Billing and Receivables/Cashiering</b>	
	Create and send external invoices for transmission to external customers
	Create contractual services payments and contract forms
	Prepare interdepartmental billings or other internal/external fees for billing
	Follow up on outstanding invoices
	Complete daily credit card batch settlements
	Manage and generate reports on accounts receivable allowances
	Collect currency, checks, and credit card payments in person, by mail, phone, or online
	Enter and reconcile receipt of funds
	Prepare cash receipt records for deposit with cashier's office
	Prepare wire transfer requests
	Manage and reconcile petty cash
	Reconcile deposit activity and accounts
	Manage or perform other "point of sale" cashiering operations
<b>Patient Accounting</b>	
	Generate, edit, and transmit third party insurance claims for medical services
	Resolve outstanding unpaid insurance claims post transmission
	Review and resolve patient account credit balances
	Generate client, contract or non-insurance monthly invoices, (e.g. occupational health)
	Post daily insurance and patient receipts including insurance contractual adjustments as appropriate
	Manage or answer inbound telephone calls from patients about account balances
	Provide financial counseling to uninsured or underinsured patients including financial assistance (e.g., charity)
	Identify and resolve partial or final denials and insurance underpayments
	File insurance claim appeals on denials for clinical reasons
<b>General Accounting</b>	
	Prepare fund transfer justifications
	Complete budget transfer documentation
	Manage accrual adjustments
	Prepare documentation for journal entries
	Upload spreadsheets/monitor external reports to interface with billing system
	Reconcile between general ledger (GL) and other systems or paper invoices

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	Initiate budget category reclassifications and cost transfers
	Examine detailed entries within finance system and make corrections when needed
	Reconcile budget to actuals and monitor variances to actuals
	Maintain fixed asset records, perform inventory of assets
	Establish and maintain chart of accounts
<b>Financial Analysis and Reporting</b>	
	Access data for use in financial reports
	Execute query and script development (e.g., common business analyst responsibility)
	Work with customers to define report parameters and content
	Provide trend and comparative analysis for revenue, expense, and other data
	Determine costs from project work
	Provide reports on available fund balances based on fund types
	Assist with questions regarding variances and investigate and resolve
	Prepare rate studies and related analyses
	Facilitate institutional tax reporting and submission
	Prepare revenue and expense reports
	Prepare external financial statements
	Prepare annual data for credit rating agencies
	Liaise with external auditors and prepare or contribute to stand-alone audits (NCAA, CPB, etc.)
	Provide financial information for annual third party benchmarking or industry assessments
<b>Budgeting, Treasury, and Financial Management (non-sponsored/all funds)</b>	
	Create the annual fiscal year budget
	Develop ongoing budget to actuals reports
	Develop and track ongoing unit expenditure reports
	Liaise with credit agencies
	Manage institutional debt, leases, investing, compliance with bond covenants, etc.
	Create program budget in discussion with program staff and chairs/faculty/PIs
	Educate stakeholders on the unit/school's budget and budget plan
	Develop monthly or annual budget forecasts for units
	Develop annual budget justification to central administration
	Manage salary distributions and related cost transfers
	Maintain and update forecasting as needed
<b>Systems Administration and Configuration (Functional)</b>	
	Request and/or provide system access to employees
	Perform functional systems administration such as maintaining and updating system workflows, data, etc.
	Support and/or participate in technology integrations
	Support and/or participate in systems enhancements
<b>Reporting and Data Management (Functional)</b>	
	Create, run, and distribute reports using finance system data
	Track metrics and data in finance or alternative systems (including Excel, Access, Google Docs, etc.)
<b>Other General Finance, Accounting, and Billing Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### Procurement, Travel & Expense, and Accounts Payable

<b>Category Management and Strategic Sourcing</b>	
	Create Request for Quote/Proposal/Information (RFx) templates and documents
	Develop Scope of Work and requirements
	Distribute RFx to market and/or manage RFx timeline
	Answer vendor questions about the RFx
	Obtain vendor proposals and quotes
	Analyze and score vendor responses and pricing



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	Negotiate proposals and pricing with vendors
	Communicate award decision to all vendors
	Complete sole source request form
	Meet with Campus or Procurement to discuss departmental needs and plans
	Monitor spend and identify opportunities to drive category cost savings and category purchasing efficiencies
<b>Contract Development and Execution (does not include pre-award)</b>	
	Draft contract templates and documents
	Negotiate contracts or renegotiate terms with vendors
	Answer contract questions from departments or vendors
	Investigate contract status
	Work with specialty departments to process contract (e.g. Risk Management, General Counsel, IT, etc.)
	Request vendor signature
	Track contract expiration and maintain contract
<b>Vendor Registration and Maintenance</b>	
	Request new vendor setup and/or vendor changes
	Collect documents and forms (e.g. W-9, reimbursement, certificate of insurance, etc.) required to set up a vendor to complete payment
	Answer vendor and contractor questions about the onboarding process or changes to vendor or contractor information
	Process and update vendor information (e.g. change of vendor address, payment, email, etc.)
	Track or manage vendor updates and changes
<b>Shopping, Requisitioning, and Purchasing</b>	
	Manage storeroom inventory for purchasing needs
	Shop or determine supplies to purchase or services needed
	Use a custom order form to collect orders from staff and faculty
	Investigate requisition/PO status
	Create purchase orders/change orders
	Purchase items via purchasing system
	Purchase items via P-card
	Obtain goods/services without a purchase order (e.g. direct pay / non-PO invoice)
<b>Receiving, Returns, and Reconciliation</b>	
	Verify goods are received / services are rendered within department
	Return unwanted goods for credit or replacement
	Reconcile P-Card statements to logs
	Reconcile vouchers to purchase orders
	Reconcile invoices to purchase orders
<b>Invoice Preparation, Management and Payments</b>	
	Determine appropriate funding sources
	Advise others on the correct interpretation of institutional, state, and federal laws as they relate to processing AP and vendor invoices
	Receive invoices (e.g. bills, timesheets, invoices with shipments, etc.) from vendors / independent contractors
	Scan invoice into financial system or procure-to-pay system
	Ensure approved internal PO matches invoice and resolve any problems
	Contact vendors or department personnel when there are document processing questions
	Collect and submit documentation for payment of honoraria
	Create a voucher to facilitate approval of a vendor invoice
	Process non-PO payments using appropriate method
	Approve vouchers / payments
	Assign funds and pay invoices received from vendors or independent contractors
	Process payments and/or credit memos
	Mail or distribute checks to vendors, contractors, etc.
<b>Travel Requesting and Booking</b>	
	Create and/or approve travel authorization form
	Review and approve travel



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	Answer questions about travel guidance and policy information
	Assist with booking travel (flight, hotel, car, etc.)
<b>Travel Expense and Processing</b>	
	Create travel expense reports
	Collect and assign receipts from traveler
	Verify funding source for travel expense
	Answer questions about expense guidance and policy information
	Process cash advance requests and recovery at completion of trip
	Approve expense reports
<b>Reporting &amp; Data Management (Functional)</b>	
	Run / download reports from financial system or procure-to-pay system
	Prepare and issue 1099s
	Track data / metrics in alternative systems (e.g. Excel, Access, Google Docs, etc.)
<b>Systems Administration and Configuration (Functional)</b>	
	Request and/or provide system access to employees
	Perform functional systems administration such as maintaining and updating system workflows, data, etc.
	Support and/or participate in technology integrations
	Support and/or participate in systems enhancements
<b>Card Program</b>	
	Request individual or departmental cards (e.g. procurement card, travel card, etc.)
	Process cards for new employees
	Manage individual or departmental p-cards
	Notify Procurement of terminated or canceled cards
<b>Other Procurement, Travel &amp; Expense, and Accounts Payable Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### Patient Access and Clinical Support Services

<b>Patient Access Services and Support</b>	
	Assist patients with appointment scheduling
	Verify patient demographics and insurance/payment information
	Prepare, maintain, and/or process patient, unit, and hospital records
	Perform assessments and plan, coordinate, monitor, and evaluate options to facilitate the continuum of patient care
	Maintain patient care supplies inventory
	Oversee registration of outpatient hospital or ambulatory clinic check-in of encounters or visits
	Oversee in-patient registrations
	Obtain insurance authorization, precertification or referrals for insurance reimbursement
	Assist in development of patient experience improvements and Patient Family Centered Care (PFCC) action plans
	Manage patient and family advisors/councils
<b>Provider Enrollment &amp; Credentialing</b>	
	Assist the clinical service/section leaders with development of privilege criteria and other documents necessary to maintain an effective credentialing process
	Coordinate the credentialing process for all providers
	Setup and maintain structure to ensure credentialing process compliance with the Joint Commission, National Committee for Quality Assurance, and all applicable federal, state, and local regulatory and accrediting agencies
	Coordinate and administer the enrollment process for medical providers on behalf of the practice plan
	Understand payor enrollment reporting requirements for delegated credentialing, demographic changes, and adverse actions, as well as how to review Federal Code of Regulations (FCR) for Medicare requirements
<b>Health Information Management</b>	
	Perform data entry, transcription, and/or coding
	Conduct information release processing
	Select and/or edit clinical codes (e.g., ICD10, HCPCS, CPT, Modifiers, etc.) from medical documentation
	Input charges to patient records for medical services
	Audit inpatient, outpatient, or ambulatory clinical codes for accuracy

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	Process paper clinical records into the EHR/medical record
	Analyze and manage charge items for revenue capture
	Analyze and manage delinquent or deficient clinical documentation for a complete medical record
<b>Other Patient Access and Clinical Support Services Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### Research Administration

<b>Research Prospecting and Planning</b>	
	Search for proposal opportunities
	Read funding announcements (e.g., solicitations, RFAs, RFPs) and provide analysis and exception detail
	Coordinate review and down-select proposals for limited submission
	Work with PIs across the university to build collaborative efforts for joint funding applications
<b>Proposal Drafting and Development</b>	
	Develop proposal - project concept, scientific portion, scope of work
	Develop proposal - administrative portion, budget, budget justification
	Develop proposal - subcontracts (e.g., LOI, SOW, budget, budget justification, commitment form)
	Complete conflict of interest documentation for proposal
	Prepare "just-in-time" (JIT) information (e.g., Other Support, IRB approval, IACUC approval)
<b>Proposal Review and Submission</b>	
	Review and approve proposal merits
	Review proposal information
	Revise and/or correct proposal based on review
	Enter data into pre-award system, if applicable
	Submit proposal to sponsor
	Review "just-in-time" (JIT) information
	Revise and/or correct "just-in-time" (JIT) information based on review
	Submit JIT information to sponsor
<b>Sponsored Research Contracting &amp; Negotiation (Incoming and Outgoing Agreements)</b>	
	Identify subrecipient risk level
	Negotiate award terms and conditions with sponsor
	Review final award stipulations for execution
	Sign award as Institutional Official
	Initiate the preparation of a subcontract
	Develop a subcontract
	Review subcontract compliance information (e.g., IRB, IACUC, COI)
	Negotiate subcontract terms and conditions with subrecipient
	Send subcontract to subrecipient for review and approval
	Receive partially-signed subcontract and review final stipulations
	Sign subcontract as Institutional Official
<b>Clinical Trials Initiation / Setup (Excludes Contracting &amp; Negotiation)</b>	
	Sponsor feasibility questionnaire
	Confidential Disclosure Agreement
	Study feasibility review/assessment
	Federal/foundation grant preparation (federally sponsored research)
	Study budget development
	Medicare Coverage Analysis/billing compliance
	Routine costs vs. research determination (per institutional policy)
	Preparation of submission to institutional regulatory committees (biosafety, radiation safety, pharmacy therapeutics etc.)
	Investigational New Drug (IND)/Investigational Device Exemption (IDE) initial application to FDA (for investigator-initiated research only)
	Preparation of initial IRB application
	Preparation of regulatory documentation (for submission to study sponsor)



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	IRB review and approval
	Study initiation visit (study sponsor driven)
	Subject recruitment planning
<b>Clinical Trials Maintenance</b>	
	Subject recruitment
	Study coordination (incl. subject management, protocol adherence, regulatory paperwork, hosting monitoring visits, prep. for sponsor audits, etc.)
	Investigator-held IND/IDE study reporting requirements
	Data and Safety Monitoring (for non-industry sponsored research)
	Clinical Trial Management System (CTMS) maintenance (e.g.: updating visit calendars based on protocol amendments, etc.)
	Visit tracking in CTMS
	Data Management (including subject data entry into EDC, query resolution)
<b>Non-Competing Continuation Applications &amp; Progress Reports</b>	
	Develop application and/or progress report for non-competing continuation
	Review application and/or progress report for non-competing continuation
	Submit application and/or progress report for non-competing continuation
	Review compliance information (e.g., IRB, IACUC, COI)
	Develop carryforward request for approval, if required
	Submit carryforward request to sponsor
<b>Account Set Up</b>	
	Revise budget to align with award amount
	Review award compliance information (e.g., IRB, IACUC, COI)
	Set up account in financial system
	Maintain documentation of new award
	Verify that the award was properly set up
	Review/approve advance account requests
<b>Sponsored Project Financial Reporting</b>	
	Prepare financial report based on sponsor requirements
	Review interim financial reports for completeness and accuracy
	Review final financial reports for completeness and accuracy
	Sign financial reports as Institutional Official
	Submit financial reports to sponsor
	Retain a copy of financial reports for institutional record
<b>Sponsored Project Invoicing</b>	
	Conduct the letters of credit (LOC) draw for all sponsored programs
	Prepare invoices based on sponsor requirements
	Review interim invoices for completeness and accuracy
	Review final invoices for completeness and accuracy
	Sign invoices as Institutional Official
	Submit invoices to the sponsor for payment
	Create corresponding accounts receivable (AR) record to reflect submitted invoice(s)
<b>Sponsored Project Cash Management</b>	
	Complete federal quarterly cash reports
	Manage/collect invoice payments
	Manage banking/clearing for sponsored programs
	Reconcile banking/clearing for sponsored programs
	Apply payments to AR balances in the financial system
	Deposit checks from sponsors
	Continuously monitor outstanding AR, especially aged receivable balances
	Inform PI and leadership of at risk AR
<b>Financial Compliance (Expenditure Monitoring, Oversight, Transaction Review)</b>	
	Monitor sponsored programs for overspending



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	Complete monthly reconciliation (e.g., payroll and non-payroll) for assigned sponsored projects
	Meet with PI to review award balances and upcoming plans
	Prepare documentation and justification for cost transfers
	Review/approve cost transfer requests
	Review a sample of cost transfers to determine compliance
	Preparation of annual report of federal expenditures (SEFA)
	Conduct periodic internal audits of direct charges/cost transfers
	Inform leadership of any institutional financial risk, including potential write-offs
<b>Effort Reporting Administration &amp; Management</b>	
	Notify PI and/or department of upcoming effort certification
	Complete effort reporting requirements
	Track current and pending effort commitments
	Collect and maintain official records of effort reporting
	Monitor compliance with effort reporting policy
<b>Account Closeout</b>	
	Notify the department of account that is due for closeout
	Prepare final account reconciliation for award closeout
	Review final account reconciliation for accuracy and exclusion of unallowable expenses
	Prepare and submit allowable adjustments or cost transfers
	Review/approve allowable adjustments or cost transfers
	Prepare additional programmatic documentation for closeout (e.g., property / invention statements)
	Submit additional programmatic documentation for closeout (e.g., property / invention statements)
	Close the account in the financial system
	Return remaining funds
<b>Systems Administration and Configuration (Functional)</b>	
	Request and/or provide system access to employees
	Perform functional systems administration such as maintaining and updating system workflows, data, etc.
	Support and/or participate in technology integrations
	Support and/or participate in systems enhancements
<b>Reporting and Data Management (Functional)</b>	
	Create, run, and distribute reports using finance system data
	Track metrics and data in finance or alternative systems (including Excel, Access, Google Docs, etc.)
<b>Other Research Administration Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### Human Resource Management (Including Benefits & Payroll)

<b>Time/Leave Entry and Payroll Adjustment (Non-Manager)</b>	
	Request payroll adjustments or exceptions (e.g., overpayment recovery, off-cycle checks)
	Manage time and attendance systems/process and access
	Calculate and process leave or paid time off accruals
	Reconcile payroll accuracy to time and financial records
	Review and/or correct time or leave entries already approved by employee managers
	Monitor manager review and approval of time/leave entries
<b>Payroll Preparation and Support</b>	
	Prepare/execute pay distribution (e.g., direct deposit, checks, paycard)
	Calculate and apply wage garnishments, withholdings, and other deductions
	Prepare deductions for and remittances to external and internal entities
	Calculate, remit, and report payroll taxes
	Assist with employee payroll request and documentation preparation (e.g., tax forms, deduction requests, direct deposit changes)
	Manage relationships and interfaces with external entities (vendors, banks, etc.)
	Calculate and reconcile gross-to-net pay calculation



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	Respond to questions about pay distributions, deductions
<b>Student Employee Recruiting and Onboarding (excluding Graduate Assistants (GAs), Graduate Teaching</b>	
	Recruit student employees (e.g., advertising, sourcing, posting, screening)
	Obtain forms/documentation and process requests or transactions related to student employment
	Monitor student employment and support compliance
<b>Volunteer and/or Person of Interest Recruitment and Onboarding</b>	
	Recruit volunteers (e.g., advertising, sourcing, posting, screening, and/or selection)
	Obtain forms/documentation and process requests or transactions related to volunteer appointment
	Manage volunteer background checks
	Monitor volunteer employment and support compliance
<b>Recruitment and Employment</b>	
	Develop recruiting plan and advertising strategy
	Develop job posting
	Screen applicants based on resumes, applications, or phone
	Coordinate interview schedules and logistics (e.g., interview room, interview committee, applicant scheduling, etc.)
	Provide support to interviewers regarding tools and process
	Assist hiring manager/search committee in completing required forms or documentation
	Complete reference checks for selected candidate(s)
	Participate in interviews
	Source candidates via phone, networking, social media, and/or various online websites and databases
	Negotiate and/or extend verbal or written offers
	Manage vacancy pools and passive candidate pools
	Request or review search waivers
<b>Classification and Compensation</b>	
	Analyze jobs and develop/modify position descriptions
	Request and/or review compensation/classification adjustments (e.g., lump sums, temporary assignments, annual adjustments)
	Conduct or support compensation planning, including annual compensation processes
	Provide consultation related to compensation and classification
	Maintain job classification and compensation structures and policies
	Advise and facilitate reclassifications and reorganizations
	Prepare or obtain forms/documentation and process requests or transactions related to compensation or classification
	Perform analysis of compensation to determine equity, salary setting, and salary adjustment
<b>New Hire Processing and Onboarding</b>	
	Plan, coordinate, and/or deliver programs related to hiring and onboarding (e.g., new hire orientation)
	Obtain forms/documentation and process requests or transactions related to hiring any category of employee
	Complete processes related to international hiring (visas, tax documents, etc.)
	Complete employee on-boarding
	Obtain forms/documentation and process requests or transactions related to new hire transitions (e.g., relocation, trailing spouse, etc.)
	Initiate other requests related to new hire setup, such as employee ID card, parking, systems access, etc.
	Obtain forms/documentation and process requests or transactions related to international employment
<b>Benefits Administration</b>	
	Plan, implement, and monitor retirement, health, education, and welfare benefits programs
	Manage vendor/provider relationships and contracts
	Provide benefits information and/or consultation
	Manage enrollment/open enrollment process
<b>Professional &amp; Organizational Development (Planning &amp; Delivery)</b>	
	Determine organizational development needs and design learning and development programs
	Plan, coordinate, and/or deliver learning/training programs
	Analyze and track needs and utilization of learning and organizational development programs
	Provide consultation regarding organizational design or change
	Provide consultation related to organizational effectiveness (change management, leadership, etc.)



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<b>Workforce Planning and Analysis</b>	
	Develop and track workforce plans and succession planning
	Develop and track HR metrics related to employee movement, succession, and retirement
	Support strategic talent plans for promotion and workforce advancement (succession planning)
<b>Academic Appointment Administration (Recruitment, Promotion, Tenure, and Sabbatical)</b>	
	Obtain forms and manage documentation related to academic appointments (recruitment, promotion, tenure, sabbatical)
	Provide information and advise on academic appointment processes and policies (recruitment, promotion, tenure, sabbatical)
	Coordinate and manage academic appointment processes (recruitment, promotion, tenure, sabbatical)
	Initiate or enter transactions/data related to academic appointment processes (recruitment, promotion, tenure, sabbatical)
<b>Employee and Labor Relations</b>	
	Prepare files and documentation related to discipline, grievance, conflict, and other employee/workplace matters
	Participate in conflict resolution
	Manage, document, and initiate reductions in force (RIFs) and layoffs
	Gather information and conduct investigations related to employee/workplace matters
	Track completion of performance plans
	Provide consultation related to discipline, grievance, conflict, and other employee/workplace matters
	Maintain relations with unions or employee advisory/governance organizations
	Provide consultation and interpretation of employment regulation, HR policy, and labor contracts
	Support the negotiation and administration of labor contracts
	Respond to organizational workplace incidents, such as deaths, workplace violence, undocumented absences, etc.
<b>Leave Administration</b>	
	Prepare and maintain files and records related to leave requests and leave administration
	Work with outside vendors on leave tracking and claims administration
	Review leave requests to determine eligibility and confirm required documentation
	Advise and track leaves, such as FMLA, workman's comp, military, military disabilities, ADA, personal, education, unemployment, etc.
	Manage unplanned, ad hoc paid leave (such as emergency closures)
<b>Process Personnel Transactions</b>	
	Initiate or enter HR-related personnel transactions
	Maintain and manage personnel records
	Enter HR-related transactions including salary distributions and related cost transfers
	Review/approve all personnel action forms submitted for any HR-related actions
<b>Equity, Diversity, and Inclusion Program Administration (Employee-Focused)</b>	
	Design and execute strategy related to promoting diversity, equity, and inclusion
	Design and execute employee inclusion groups and other related programming
	Support development of affirmative action plan and track affirmative action plan efforts
	Develop and deliver training and programming related to culture, diversity, and inclusion
	Partner with campus and external groups or associations to increase visibility
	Attend career fairs, conferences, and other events related to promoting equity, diversity, and inclusion
	Develop diversity scorecards and related resources
	Develop and/or monitor programs and processes related to fair hiring and promoting diversity
<b>Systems Administration and Configuration (Functional)</b>	
	Request and/or provide system access to employees
	Perform functional systems administration such as maintaining and updating system workflows, data, etc.
	Support and/or participate in technology integrations
	Support and/or participate in systems enhancements
<b>Reporting and Data Management (Functional)</b>	
	Create, run, and distribute reports using finance system data
	Track metrics and data in finance or alternative systems (including Excel, Access, Google Docs, etc.)
<b>Other Human Resource Management Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### Marketing & Communications

<b>Written Content Development for Promotion</b>	
	Research, write, and edit stories about institution for online or print production
	Prepare layouts for print or digital magazines, newsletters, or annual reports
	Develop narrative content for websites
<b>Creative Design</b>	
	Conduct front-end design for print publications
	Design logos and brand identities for campus units or constituencies
	Conduct front-end design for websites and digital media
<b>Photography, Videography, and Animation</b>	
	Take, select, and edit photos for publications
	Develop animations for promotional publications
	Film, edit, and embed videos in various media
<b>Social Media Management, Content Creation, and Measurement</b>	
	Manage and monitor social media feeds for the institution, school, department, or unit
	Create copy for social media posts or social media specific collateral (e.g. meme)
	Measure social media views, re-posts, and other metrics
<b>Media Relations and Issue Management</b>	
	Write news releases and advisories for media
	Respond to media requests or coordinate response efforts
	Respond to public records requests
	Manage emergency communications
	Conduct media tracking of stories about the institution, school, department, or unit
	Develop messages specific to the institution, school, department, or unit to manage situations
<b>Website Content Administration and Performance Tracking</b>	
	Manage non-narrative front-end web content (e.g., bios) for the institution, school, department, or unit and ensure they are up-to-date
	Provide content management and CMS training to staff and others with content responsibilities
	Manage the institution, school, department, or unit calendar of events
	Monitor website traffic, click rates, open rates, and impressions
<b>Marketing and Communications Planning and Strategy</b>	
	Engage in the creation, support, and/or documentation of marketing and communications strategy related to initiatives, plans, or events
<b>Marketing, Advertising, or Freelance Management</b>	
	Manage or work with third-parties on the development or operationalization of marketing or advertising plans
	Manage engagement with third-party freelancers (e.g., identifying, contracting, etc.)
	Manage ad buys, paid search, and search engine optimization (SEO)
<b>Internal Communications</b>	
	Develop annual reports
	Manage communications updates to services, policies, and procedures
<b>Executive Communications and Coaching</b>	
	Perform or assist with speech writing
	Develop presentation or support materials for management or leadership
	Perform or assist with executive coaching
	Author or edit memos or reports for management or leadership
<b>Marketing Analytics</b>	
	Conduct market analysis to inform audience/customer segmentation
	Measure, manage, and analyze marketing and advertising performance (non social-media)
<b>Brand Management</b>	
	Review and approve institutional logo copyright requests
<b>Other Marketing and Communications Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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## Huron Activity Study Catalog

### Information Technology

<b>Application Development and Functional Application Support</b>	
	Develop specific applications for departmental/unit needs
	Provide application training and documentation
	Resolve problems with applications and application upgrades
	Manage procedure definition for unit and upgrade reminders
	Perform upgrades, patches, and enhancements to existing applications
	Modify/update applications to comply with accessibility requirements
<b>Classroom/Conference Room – Teaching and Learning Technology Support</b>	
	Provide classroom, lab, or conference support (e.g. hardware, software, connectivity)
	Provide one-time setup of technology, including computers and audio-visual support
	Provide consultation and training for classroom technology (e.g., design, prepare, and/or plan)
<b>Database Administration</b>	
	Create and modify databases and schemas
	Maintain database security
	Setup clustered database systems
	Provide database support and management to specific sponsor specifications
	Provide maintenance for system patching and remediation issues
	Manage data governance and data access requests
<b>Data Centers/Facilities</b>	
	Coordinate facilities/environmental support and management
	Set up specialized data centers to support sponsor specific requirements
	Operate and maintain data centers
<b>Helpdesk and Desktop/Laptop/Mobile Support</b>	
	Provide user support via phone, walk-in support
	Configure desktops for end users
	Triage and troubleshoot end user issues
	Triage, troubleshoot, and set up network printing
	Provide IT support services for student population
	Support and maintain specialized devices, including: ATM-style teller machines, HVAC interfaces, environmental monitoring and alarm devices, public safety devices, building or parking access/entitlement interfaces, point of sale interfaces, transportation and parking devices, etc.
<b>Information Security</b>	
	Manage data security
	Manage and coordinate administration of technical and physical controls (e.g. firewall, IDP/IPS, proxy)
	Provide incident response and forensics, security consultation, and security awareness training
	Manage enterprise-wide security response and ensure sponsor specifications and audit requirements are met
	Provide information security intel based on multiple source indicators to identify and eliminate advanced threats
	Monitor HIPAA compliance for research containing PII
<b>IT Management</b>	
	Manage department-level projects and programs
	Develop IT policy and governance
	Consult and build/buy analysis in support of IT investments
	Manage IT vendors and contracts
	Manage software reclamation/licensing
	Coordinate IT service costing and chargebacks
	Coordinate administration of disaster recovery/business continuity, operations, and backup security for departmental storage needs
	Maintain and inventory hardware and software, including acquisition/setup, management of surplus, hardware repair, etc.
<b>Network and Voice Management</b>	
	Provide maintenance for wire and cable infrastructure and wired management/administration (e.g. devices, VPN)
	Provide wireless management and administration
	Provide phone management
	Integrate VoIP system with other tools

## Huron Activity Study Catalog

	Install and configure network devices
	Manage PBX/Switch systems
	Perform ongoing monitoring, routing, and tuning support for network and network devices
	Setup and manage identity access tools to restrict network access
<b>Research Technology Infrastructure</b>	
	Coordinate management, administration, and maintenance of high performance research computing hardware and software (including OS/cluster software)
	Develop research systems and software
	Integrate research systems
	Support laboratory equipment monitoring
	Install and maintain laboratory equipment
	Provide advice and consult on equipment purchases
	Provide IT research support
	Provide IT audit support and functionality to meet sponsor regulations
<b>Server Administration &amp; Management</b>	
	Coordinate administration, disaster recovery/business continuity, and ongoing operations of servers
	Manage backup patching/remediation and system migration
	Manage virtualized server support
<b>Web Development &amp; Maintenance</b>	
	Design and build new websites for the institution, school, department, or unit
	Manage the content management systems (CMS) for the institution, school, department, or unit
	Manage other web applications for the institution, school, department, or unit
	Monitor and analyze web traffic
	Provide content management training to staff and others with content responsibilities
	Liaise with IT for web server support
	Manage web server hosting and/or management
	Monitor and support development to meet accessibility requirements
<b>Enterprise Data Management</b>	
	Manage data governance practices
	Develop central repositories for information from across the institution
<b>One-Time IT Projects</b>	
	Design, plan, or implement a new system or system modifications
<b>Identity and Access Management</b>	
	Virtual Role/Access Provisioning
	IAM system Maintenance
	IAM Development
<b>ID Card Management</b>	
	Process ID card requests from students, faculty, affiliates, etc.
	Print ID cards
	Manage building access requests and changes
	Coordinate identity and access management with IT
<b>Other Information Technology Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### Enterprise Risk Management, Audit, and Compliance (Non-research / Not Including Student Conduct)

<b>Financial Audit</b>	
	Audit potential fraud, embezzlement, theft, waste, etc.
	Audit internal controls
	Coordinate activities and/or requests of external auditors
<b>Operational Audit</b>	
	Review and coordinate internal controls
	Audit operational units for resource efficiency



## Huron Activity Study Catalog

	Prevent and detect fraud
	Organize Managed Care Organization audits and assist auditor when reviewing application files and follow up with any reports
<b>Audit Planning</b>	
	Develop annual audit plan
	Prioritization of risk and planned audits
	Communications with board or leadership regarding audit plan
<b>Risk Management Support for Legal/Regulatory Matters</b>	
	Work with internal audit teams to determine potential areas of legal liability/risk
	Outline risk management plan and response
	Conduct annual risk assessment
	Review of new internal controls
	Provide guidance on industry norms
<b>Policy development, review, and interpretation</b>	
	Serve as a resource for consultation and advisement
	Provide guidance to units on compliance policies, procedures, deadlines, and risks
	Maintain and update code of conduct
	Develop, review, and interpret policies
<b>Compliance</b>	
	Manage or support programs of compliance to adhere to requirements for governing agencies (e.g. Title IX/Dept of Education, HIPAA/FERPA, NCAA, Athletics)
	Provide guidance to units on compliance risk
	Prepare, review, and maintain institutional records for research integrity/compliance offices
<b>Incident response and investigation</b>	
	Assist with ethics investigations
	Lead or contribute to incident review
	Conduct or assist with investigations
	Conduct hotline intake and triage
<b>Other Enterprise Risk Management, Audit, and Compliance Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### Enrollment Management

<b>Undergrad Student Recruitment &amp; Admissions</b>	
	Manage prospective student recruitment activities (campus & school visits, attend events, meet with potential students)
	Coordinate logistics for undergraduate visits
	Create, review, and distribute marketing and communications for student recruitment/admissions
	Review applications and support selection process
	Manage communications with prospects/applicants throughout the admissions process
	Coordinate and support offer process (e.g., scholarships, grants, etc.)
	Provide onboarding support for incoming students
<b>Graduate Student Recruitment &amp; Admissions</b>	
	Coordinate and/or manage prospective graduate student recruitment activities (campus & school visits, attend events, meet with potential students)
	Coordinate and support admissions and offer process (scholarships, fellowships, assistantships, etc.)
	Interview and support selection of Graduate Research Assistants (GRAs), Graduate Teaching Assistants (GTAs), and Graduate Assistants (GAs)
	Perform eligibility review for GRAs, GTAs, and GAs
	Provide support for incoming GRAs, GTAs, and GAs
	Facilitate annual review and reappointment processes for GRAs, GTAs, and GAs
<b>Enrollment Operations</b>	
	Perform application completion activities
	Monitor enrollment during advising and enrollment periods
	Coordinate communication and coordination with campus leadership, enrollment partners and programs
	Perform selection and yield activities
	Gather data and perform planning/analysis

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<b>Registration (Registrar)</b>	
	Enroll students in courses
	Manage student "person account" details
	Gather/organize student data to support advising for annual / semester reviews of student progress (both undergraduate and graduate) and/or departmental recognition/award committees
	Monitor student matriculation, retention, and progression
	Oversee classroom reservation/scheduling
	Conduct degree audits
	Conduct credit evaluations
	Issue transcripts
	Manage and support commencement activities
<b>Financial Aid</b>	
	Award financial aid (need/merit)
	Award teaching or research assistantships
	Process and disburse loans
	Manage and communicate information related to financial aid in the form of grants or scholarships
	Monitor compliance (e.g., Title IV)
	Perform verification of eligibility for specific programs, scholarships, grants, etc.
	Process tuition waivers and stipends
<b>Student Accounts and Billing (Bursar)</b>	
	Perform billing and collect payments
	Guide fee changes through fee approval process
	Issue 1098-T forms
	Establish, monitor, and update cost of attendance figures for campus
	Establish and communicate tuition calculations
	Assign departmental costs or expenses to student billing
	Communicate with other offices regarding various payment issues (holds), new scholarships/assistantships, and related policies
	Administer collections
	Issue student aid payments
	Administer payment plans
<b>Systems Administration and Configuration (Functional)</b>	
	Request and/or provide system access to employees
	Perform functional systems administration such as maintaining and updating system workflows, data, etc.
	Support and/or participate in technology integrations
	Support and/or participate in systems enhancements
<b>Reporting and Data Management (Functional)</b>	
	Create, run, and distribute reports using finance system data
	Track metrics and data in finance or alternative systems (including Excel, Access, Google Docs, etc.)
<b>Other Enrollment Management Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### Alumni Affairs, Development, and Advancement

<b>Fundraising - Major and Principal Giving</b>	
	Advance major donor relationships through meetings, calls, etc.
	Cultivate and solicit major gifts
	Plan gift strategies and major asks
<b>Fundraising - Planned Giving</b>	
	Manage/support planned giving programs
<b>Fundraising - Annual Giving</b>	
	Advance annual donor relationships through meetings, calls, etc.
	Steward annual giving programs
<b>Stewardship</b>	



## Huron Activity Study Catalog

	Prepare communications for donors (e.g., thank you letters, solicitation letters, etc.)
	Create custom giving and investment reports for donors
<b>Prospect Research and Management</b>	
	Conduct prospect research
	Assign fundraisers to donor records
<b>Campaign Planning and Strategy</b>	
	Coordinate major capital campaigns
	Create and guide strategic plans for multi-year fundraising campaigns
<b>Gift Accounting &amp; Processing and Records Management</b>	
	Process incoming gifts
	Work with relationship managers to support proper gift recognition
	Conduct gift accounting and related activities
	Create new donor records
	Update/manage donor records
	Process and route gift agreements
<b>Alumni Affairs</b>	
	Manage alumni lists
	Coordinate and assist alumni engagement (e.g., clubs, activities, communications)
	Manage class programs
	Coordinate/collaborate with University Career Services
<b>Systems Administration and Configuration (Functional)</b>	
	Request and/or provide system access to employees
	Perform functional systems administration such as maintaining and updating system workflows, data, etc.
	Support and/or participate in technology integrations
	Support and/or participate in systems enhancements
<b>Reporting and Data Management (Functional)</b>	
	Create, run, and distribute reports using finance system data
	Track metrics and data in finance or alternative systems (including Excel, Access, Google Docs, etc.)
<b>Other Alumni Affairs, Development, and Advancement Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### External Reporting (Non-financial / Non-sponsored)

<b>Data Collection for Institutional Research</b>	
	Contact departments and units for institutional data
	Perform data analysis
	Advise leadership on decisions that have institutional impact based on data analysis
	Provide key insights to inform institutional planning
<b>Recurring Internal and External Report Creation and Submission</b>	
	Compile campus data to create annual internal reports (e.g. credit hours, student headcount, staff FTEs, etc.)
	Update and maintain yearly reports
	Receive and fill external reports
	Manage institutional reporting data submission processes
	Send external report to external source
<b>Compliance with External Mandates for Reporting</b>	
	Compile data necessary to complete the Common Data Set
	Manage accreditation processes
	Maintain and submit materials related to accreditation
	Ensure data compilation complies with all benchmarking mandates on the following levels: federal, state, system, accreditation, and voluntary (e.g. IPEDS, US News, etc.)
<b>Other External Reporting (Non-financial, Non-sponsored) Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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## Huron Activity Study Catalog

### Academic Program Support (Advising, Course Scheduling)

<b>Academic and Program Advising/Student Support</b>	
	Assist undergraduate advisor with tracking information
	Manage undergraduate records: process comprehensive undergraduate exams, schedule rooms for exams, calendaring for participation in exams, record maintenance and destruction, serve as checkpoint for departmental compliance with policies
	Assist Graduate Advisor with tracking information
	Advise Graduate Teaching Assistants (GTAs) and Graduate Assistants (GAs)
	Manage graduate records: process comprehensive graduate exams, schedule rooms for exams, calendaring for participation in exams, record maintenance and destruction, serve as checkpoint for department compliance with policies
	Coordinate logistics for potential graduate student recruitment visits
	Support graduate student application process
	Lookup and evaluate charges to student accounts
	Create informational email messages sent out to students
	Assist students with course planning
	Resolve student concerns regarding tuition/fee payment
	Conduct degree audits
<b>Degree/Course Creation</b>	
	Develop degree requirements
	Create and manage curriculum
	Obtain appropriate approval for creation
<b>Oversee Academic Degree Plans</b>	
	Manage change of major process
	Develop and maintain academic course catalogs
	Develop and communicate academic plans
	Create and maintain student records
<b>Oversee Non-Degree Programs</b>	
	Oversee governance of non-credit programs and learners
	Oversee faculty governance of non-credit programs
	Oversee periodic (e.g. 5-year) reviews of non-credit programs
	Request Board of Regents approval for programs, changes to rates, fees, etc.
<b>Program Evaluation and Assessment</b>	
	Collect course evaluations
	Coordinate program assessment process
	Conduct program review and planning
<b>Online and Professional Program Development and Support</b>	
	Provide faculty support for non-credit offerings, professional programs, continuing education, and MOOCs
	Support instructional and learning design
	Administer revenue share agreements with 3rd parties
	Develop and manage advisory boards for program development and growth
	Provide online support to include validation, proctoring, platform/technology support, guidance, etc.
<b>Other Academic Program Support (Advising, Course Scheduling) Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### Student Services

<b>Manage Student Services, Activities, and Programming</b>	
	Coordinate student activities and programming
	Approve new campus organizations
	Support student government activities
	Support Greek life programming and activities
	Coordinate campus wellness services (including counseling and psychological services)
	Provide marketing and communications for campus wellness services
	Process student leave of absences
	Support student program financial management



## Huron Activity Study Catalog

	Provide marketing and communications to campus
	Manage student housing programs
	Manage student meal plan administration
	Manage veterans services programs
	Manage disability services programs
	Promote diversity and inclusion through programming
<b>Career Search, Advising, and Networking Support</b>	
	Administer career advising appointments
	Provide career counseling and networking support
	Maintain career services technology (functional)
	Review resumes, intake surveys, and other related documentation
	Recruit and maintain relationships with employers
	Support employer relations including scheduling on-campus interviews and information sessions
<b>Manage Student Services Facilities/Space</b>	
	Coordinate building security and operations
	Manage student collaboration space and offices
	Operate and maintain student facilities
	Provide student event setup / tear down support
<b>Judicial Affairs (Student Conduct)</b>	
	Process student conduct reports
	Respond to student incidents, including demonstrations, protests, etc.
	Manage student grievances and appeals
	Coordinate student conduct review process
	Perform student mediation
<b>Other Student Services Activities Not Listed Above</b>	
	Please list any other relevant activities you perform in this area

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### External Relations

<b>Government Relations</b>	
	Manage relationships with local, state, and federal governmental agencies
	Manage institutional relationships with elected officials
<b>Community Relations</b>	
	Manage institutional relationships with local officials, community reps, etc.
<b>Corporate Relations</b>	
	Manage institutional relationships with corporate entities
<b>International Relations</b>	
	Manage institutional relationships with international entities
<b>Other External Relations Activities Not Listed Above</b>	
	Please list any relevant activities you perform in this area

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### Other

<b>Other Activities</b>	
	Please list any relevant activities you perform that are not captured elsewhere in the above functions (be sure to review full catalog to see all possible functions and activities)

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