Center on Disability and Community Inclusion

Information and Procedures
MANUAL

University of Vermont
Center on Disability and Community Inclusion
208 Colchester Avenue
3rd Floor Mann Hall
Burlington, VT 05405
(802) 656-4031
## Table of Contents

### Mission and Goals
Mission and Goals

### Introduction to CDCI Procedures
Introduction to CDCI Procedures

#### Facility
- Opening/ Closing Center
- Office Areas
- Recycling and Trash Removal
- Security
- Kitchen
- Conference Rooms
- Parking

#### Office Protocols
- Office Etiquette
- Dress Code
- Phone Coverage

#### CDCI Protocols
- Orientation
- Orientation Checklist
- Staff and Faculty Evaluations
- Evaluation Forms
- Exit Interview Procedure
- Gifts and Donations
- Sick Time
- Compensatory and Flex Time
- Vacation and Holidays
- Staff Vacation Internal Practice

#### Computers
- Computer Communication (Email, ListServes, Web Site)
- Connecting to UVM VPN
- UVM GuestNet
- Large File Transfer
- Active Directory / Shared Folders
- Connecting to the Shared Drive
- Acceptance of Computer form

#### Office Equipment
- Office Equipment
- Telephone Conference Calling

---

1

4

6

7

7

8

9

10

13

14

15

17

18

20

22

23

24

25

25

26

27

28

29

30

32

33

34

35

36

37
Copiers and Fax Machines ................................................. 38
Office Supplies .................................................................. 39
Purchasing Form .................................................................. 40

Shared Materials
Software ............................................................................. 42
Adobe Connect ..................................................................... 43
Oracle Calendar .................................................................... 43
Audio Visual Equipment ......................................................... 44

Data Entry
NIRS Database ....................................................................... 46
NIRS Database Step-by-Step Instructions ................................ 46

Money
Purchasing ............................................................................ 48

Travel
CDCI Travel Guidelines ......................................................... 51
In-State Car Travel ................................................................. 55
Round Trip Miles from UVM template .................................... 56
Travel Cash Advances ............................................................. 58
Travel Receipts ....................................................................... 59

APPENDICES

APPENDIX 1 CDCI Annual Report ........................................... i
APPENDIX 2 UVM Payroll and Admin Holidays ....................... ii
APPENDIX 3 Voicemail (Callpilot) Instructions ......................... iv
MISSION AND GOALS

CENTER ON DISABILITY AND COMMUNITY INCLUSION (CDCI)
Vermont University Center on Excellence in Developmental Disabilities (UCEDD)

I. MISSION STATEMENT: The Vermont University Center on Excellence in Developmental Disabilities, the Center on Disability and Community Inclusion (CDCI) in collaboration with individuals with developmental disabilities, their families and communities, promotes the self-determination, independence, productivity, integration and inclusion in all facets of community life for individuals with developmental disabilities. This is achieved through advocacy, capacity building, and systemic change activities in the UCEDD core function areas of interdisciplinary training, community service and technical assistance, research and dissemination.

Vision: CDCI envisions a future where all persons, including people with disabilities and their families, are fully engaged members of society.

Values Statement: CDCI values the participation of people with disabilities, the community, family members and education and health agencies. CDCI works to advance principles of choice, self-determination, community inclusion and cultural competence. CDCI does this through our values of:

- **Integrity** in our working relationships and practices
- **Leadership** in advancing promising and evidence-based practices
- **Service** to people with disabilities, their families and providers of services
- **Partnership** with individuals, agencies, communities and people with disabilities and their families

II. ORGANIZATIONAL STRUCTURE: CDCI will be organized around a team structure that reflects the mission of a University Center on Excellence in Developmental Disabilities (UCEDD). Five core function teams (described further in this document and listed on the attached Organizational Structure chart) will work in unison with the CDCI Executive Director, Associate Director(s), and CDCI Leadership Team to advance the CDCI mission and its 5-year plan. Special Projects teams will be created as needed to accomplish specific short-term projects.

III. GOVERNANCE STRUCTURE: The governance structure of CDCI will include an Executive Director, Associate Director(s), Leadership Committee, and five Core Function Teams. An Executive Committee and Consumer Advisory Council will provide input and advice to CDCI through the Executive Director. CDCI will partner with the other two U.S. Department of Health and Human Services, Administration on Developmental Disabilities...
Center on Disability and Community Inclusion Manual

(ADD) funded Vermont programs (e.g., Protection and Advocacy and the Developmental Disabilities Council) to fulfill the mission of the UCEDD.

Executive Committee: The committee will meet at least once a year. It will be composed of at least one legislator, the Dean of the College of Education and Social Services, the Provost of the University of Vermont, the Vice Provost of Research and Sponsored Programs, the Director of Special Education for the State of Vermont, at least one Chief Executive Officer of a Vermont business. This group will: (a) receive updates on CDCI goals, activities and outcomes; and (b) provide valuable insight into emerging trends and directions that CDCI may consider for development of grants and/or new projects.
Faculty and Department Chair Resources:  
http://www.uvm.edu/~facrsrcs/

Staff Handbook:  
http://www.uvm.edu/hrs/?Page=info/staffhandbook/staffhandbook.html

Code of Business Conduct:  
www.uvm.edu/~uvmppg/ppg/general_html/businessconduct.pdf

UVM Our Common Ground Statement:  
http://www.uvm.edu/~president/?Page=miscellaneous/commonground.html

UVM Presidents Commission for Inclusive Excellence:  
http://www.uvm.edu/president/pcie/

UVM Disability Accommodation Policy:  
http://www.uvm.edu/policies/hr/disabilityemploy.pdf

Human Resources:  http://www.uvm.edu/hrs/

Recycling and Waste Management:  http://www.uvm.edu/~recycle/

UVM Administrative holidays are posted yearly at www.uvm.edu/~uvmhr

The complete Computer and Network Use Policy are available at:  
www.uvm.edu/~uvmppg/ppg/cit/compuse.pdf

The complete Travel Policy includes many specific guidelines for flights, lodging, meals etc. and can be found at:  
www.uvm.edu/~uvmppg/ppg/travel/travel.pdf

The PeopleSoft process for Travel and Expense reimbursement is available at:  
http://www.uvm.edu/hrs/skills/manuals/travelandexpense.pdf

For more information about the Email standard or for directions on how to change your email address, go to:  
http://www.uvm.edu/it/email/
Introduction to CDCI Procedures

These procedures were developed in an effort to help make the everyday functioning of the Center run as smoothly as possible. Providing answers to common questions or solutions to common problems, we hope to make many of our lives easier.

CDCI Procedures apply to all CDCI faculty and staff, unless otherwise indicated for a specific procedure. They are consistent with UVM Policies and Procedures and the full and part-time Collective Bargaining Unit documents.

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility</td>
<td>1</td>
</tr>
<tr>
<td>Office Protocols</td>
<td>2</td>
</tr>
<tr>
<td>CDCI Protocols</td>
<td>3</td>
</tr>
<tr>
<td>Computers</td>
<td>4</td>
</tr>
<tr>
<td>Office Equipment</td>
<td>5</td>
</tr>
<tr>
<td>Shared Materials</td>
<td>6</td>
</tr>
<tr>
<td>Data Entry</td>
<td>7</td>
</tr>
<tr>
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<td>8</td>
</tr>
<tr>
<td>Travel</td>
<td>9</td>
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</table>
Facility

Opening and Closing the Center

Hours of Operation: 8:00am – 4:30pm

The Center will be opened daily by the first Core staff member to arrive and closed by the last Core staff member to leave. Below are the tasks associated with opening and closing the Center.

Opening the Center:

- Messages retrieved from answering machine
- Messages recorded and distributed to individual mailboxes
- Copy room door opened
- Copiers turned on
- Supply closet unlocked
- During flu season, common area doorknobs and copiers are wiped down with a germicidal cleaner.

Closing Individual Offices:

- Personal or confidential information cleared from surfaces and locked in secure filing cabinets or drives
- Computers off
- Printers off
- Lights off
- Windows shut – prevents papers from being blown around or weather from damaging furniture or computers
- Office door shut and locked

Closing the Center:

- Individual office doors closed and locked
- Supply closet closed
- Copiers turned off
- Copy room door closed and locked.
All lights off in common rooms and offices
Notify any faculty still present that the office has been closed prior to leaving. Please let someone know if they are the last one left on the floor.

Office Areas

Office spaces should be kept neat, tidy and organized.

Keep desks clear of papers that contain personal information or that may be viewed by others or may blow away or be misplaced.

Recycling and Trash Removal

Each office has a recycle bin. Please use it for all paper products.

Office Assistant will come by once per day to empty the recycle bin.

Additional recycle bins for paper and cans are located in the hallway and in the copy room

SURPLUS ITEMS DISPOSAL PROCEDURES – contact Business Office by email, which will offer item to other projects. After, Business Office will arrange pickup, charging any associated fee to project. Equipment to be surplussed must remain in individual offices. Please do not move equipment to the hallway. No heavy equipment or furniture should be moved by Staff. Please wait for UVM professionals to move items.

UVM RECYCLING POLICY (see “Recycling and Waste Management” under “UVM Policies and Procedures Web Resources”)

Emptying office trashcans is the responsibility of each person residing in an office. The small trash bin should be emptied daily into the common hallway receptacles for trash. Only the common hallway receptacle for trash will be picked up by contracted cleaning staff and not individual office trash.

Security

Please do not keep money at CDCI unless there is a safe that is locked.

Keep our environment safe. During day, keep all doors (to unoccupied offices) locked. Keeping the main doors at each end of the hallway
open. At 4:30pm, lock main doors; if at office after 4:30 shut off lights, shut off machines, etc. when leaving.

- Keep computers and laptops locked to desks.

**Kitchen**

- A sink, microwave, refrigerator, and coffee maker are available in the kitchenette for use by all CDCI personnel.

- The refrigerator can be used to store lunches, beverages, coffee supplies etc. Plan to remove your leftover food from the refrigerator weekly, to ensure there is room for everyone’s items.

- Occasionally there is extra food from conferences that is placed in the kitchen for others to share. Often an email is sent to the Center-based personnel, or a note is left with the food to indicate it is there for all to help themselves.

- In addition to setting up the food, the person(s) running the conference should dispose of it as well. You can make arrangements for the food disposal if necessary, for example asking a co-worker to throw out the leftovers the next day.

- The cleanliness of the kitchen is the shared responsibility of everyone who uses it. Please wipe up spills, clean your own containers, leave the sink clean, and throw away any trash. This will keep the space neat and clean for everyone. A sign up sheet is posted in the kitchen for monthly cleaning: anyone who uses the kitchen is asked to take a turn. If it is your turn to clean the kitchen, send an email a day before cleaning to CDCI Mann Hall list, reminding folks to label their items or remove them. Then clean the fridge, throwing out perishables and containers that are not labeled to be saved, clean the microwave, and wipe down all surfaces.

- The kitchen sink and counters will be cleaned by the CDCI Office Assistant daily. She or he will clean it more thoroughly on the last Friday of the month and prior to vacations.

- If we are running low on kitchen supplies, please let the business office know so that we can order them.
Conference Rooms

- There are two conference rooms available for meetings – one large (seats about 12 comfortably) and one small (seats about 4 comfortably).

- The conference room sign-out calendars are available via Oracle. Anyone wishing to use this space should check the availability on the calendar.

- When reserving the space, include your name and time on the appropriate date.

- Many groups within the Center use the conference room. As such, please make sure the room is clean, easels and posters removed, cords for the phone and television are organized, and the table clear before you leave.

- Staff should not leave materials for conferences in an office area for more than 24 hours.

- To decrease interruptions and make locating groups easier, when you meet in a conference room, please post the name of your group at the door.

- If you have any questions about the conference rooms or want to check on availability, you can call the business office at 656-4031.
Parking

- Parking at Mann Hall is restricted between the hours of **7am and 6pm**, Monday through Friday.

- Visitors to Mann Hall (including CDCI staff and faculty without permits) have the following options:
  - Using a **lot designated for visitors**
  - Using 2-hr parking **meters**, or
  - Obtaining **temporary parking pass** from CDCI (with prior permission by calling the Business Office).

  - Temporary parking passes are available from the CDCI Business Office, Room 302B Mann Hall. These passes are purchased from individual Project budgets, so please indicate the Project associated with your visit when you request the pass.

  - To order parking passes on a project, the Project Coordinator needs to sign off on the purchase (via email is okay). A copy of that sign-off, along with a print-out of the screen order, needs to be submitted to the Business Manager. When you place the order, please note the quantity ordered and that day’s rates on the print-out. This will be the backup for these transactions.

  - The pass is good for one day only, and that date must be clearly written on each pass.

  - Park in the location indicated on the pass:
    - **“Upper lot”** is behind Delehanty Hall.
    - **“Lower lot”** is directly at the base of Mann and Delehanty Halls.

- People displaying a valid University issued parking permit can park in designated areas without a parking pass.

- Members of the University community using handicapped parking must register their vehicle with the University by contacting Transportation and Parking Services at [http://www.uvm.edu/~tpswww/](http://www.uvm.edu/~tpswww/)
Individuals displaying a valid, state issued handicapped plate, placard, or hangtag may park at no cost.

Individuals operating a vehicle or parking must observe all University parking rules and regulations.

CDCI temporary parking available to CDCI Staff and Faculty holding a current UVM parking permit, in order to park at other campus lots temporarily (up to 2 hours). Must sign pass out from the Business Office and back in again when returned.

Anyone receiving a ticket (e.g. for parking without a pass, parking with an expired pass, or parking in an invalid location) must address it with Transportation and Parking. Staff is not responsible for contesting a ticket.
Office Protocols
Office Etiquette

Some operating norms observed by everyone working at the Center will help create a supportive and comfortable environment for all.

- Having an expectation of respect; intolerance for disrespect including the use of person first language and being sensitive to the cultural backgrounds of others.
- Cleaning up after yourself in the kitchen and other common spaces
- Food leftover from meetings should be put in front of the mailboxes or in the break room and an email sent out to the CDCI Mann Hall listserv
- Extending an effort to pitch in whenever reasonable
- Keeping papers with names of clients, financial information or other personal information secure and not easily viewed by others
Dress Code

- At the Center, CDCI personnel are asked to dress in a neat, business casual manner. This style allows for better comfort and productivity, but also maintains a professional environment.

- Proper grooming and attire have a positive impact on the Center's image. All employees shall maintain grooming and attire standards that bear a reasonable relationship to their work.

- Listed below is a general overview of acceptable business casual wear as well as a listing of some of the more common items that are not appropriate for the office. These items should help set the general parameters for proper casual business wear and allow you to make intelligent judgments about items that are not specifically addressed.

  - **Slacks**—Slacks that are clean and wrinkle-free and jeans that are not frayed or worn. Inappropriate items include sweatpants, wind suits, short shorts, bib overalls, leggings, spandex or other form-fitting pants.

  - **Shirts**—Casual shirt, golf shirt, sweaters and turtlenecks are acceptable. Inappropriate items include sweatshirts, shirts with large lettering, logos or slogans, spaghetti-straps and low cut or halter-tops.

  - **Dresses and Skirts**—Casual dresses and skirts, and split skirts are acceptable. Mini-skirts and spaghetti-strap dresses should not be worn to the office.

  - **Footwear**—Loafers, boots, flats, dress sandals, open-toed shoes, clogs, leather deck shoes and clean athletic shoes are acceptable. Beach flip-flops, Velcro sandals and slippers are not acceptable. For your safety, footwear is required in all common Center locations (e.g. hallway, copy rooms, main offices).
Phone Coverage

- The main phone line for CDCI (656-4031) will ring in Room 302C. A telephone coverage schedule is arranged among Center personnel, overseen by the Business Manager.

- Calls for the ITeam and the DeafBlind Projects will be forwarded to their Program Assistant at 656-7122.

- Calls for the BEST project will be forwarded to their Program Assistant at 656-5775.

- Calls for the AT Tryout Center will be forwarded to 656-4767.

- Phones should be covered at all times during the Center's hours of operation (8:00am to 4:30pm). Core staff will ensure that someone is responsible for answering the phones when they leave their desks.

- If no one is available to cover the phones, they will be forwarded to the main phone line voicemail. See Appendix 15 for Voicemail (Call pilot) Instructions.
CDCI Protocols
Orientation

- New employees of CDCI will attend two orientations - a general UVM orientation and a CDCI orientation.

- During the CDCI orientation, a checklist will be completed providing the new employee with general information about CDCI policies, procedures, etc.

- When a new person is hired:
  - A notice will be sent to CDCI by the Executive Director, announcing the new employee.
  - Business Manager will initiate the use of the Orientation checklist - filling in the name of the new employee, delegating a Main Contact Person (typically the direct supervisor or Project Coordinator), and then forwarding the checklist to the Main Contact Person.
  - The Main Contact Person will complete the Orientation Checklist items with the new employee, connecting the employee to a "Person to See" as needed.
  - Upon completion of the checklist, the Main Contact Person returns it to the Business Office for filing.
### CDCI Orientation Checklist for Standard Employees

**New Employee Name:**

**Primary Project Coordinator:**

**Project Name:**

<table>
<thead>
<tr>
<th>Orientation Activity</th>
<th>Person Responsible</th>
<th>Date</th>
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<tbody>
<tr>
<td>Introduction to Center Faculty and Staff, and to other University Faculty and staff associated with CDCI and/or Project</td>
<td>Project coordinator</td>
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<tr>
<td>Tour Mann Hall</td>
<td>Project coordinator</td>
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<tr>
<td>Key and CatCard Access</td>
<td>Business Manager</td>
<td></td>
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<tr>
<td>Necessary Numbers given to employee: budget number, copy machine number, long distance code</td>
<td>Business Support Generalist</td>
<td></td>
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<tr>
<td>Name given to IT for access to Active/Directory/Shared Folders</td>
<td>HR Support Generalist</td>
<td></td>
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<tr>
<td>Name and email given to Dissemination Coordinator to add to ListServes</td>
<td>HR Support Generalist</td>
<td></td>
</tr>
<tr>
<td>Emergency Contact information obtained</td>
<td>HR Support Generalist</td>
<td></td>
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<tr>
<td>NIRS Training given</td>
<td>HR Support Generalist</td>
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<tr>
<td>Receives and reviews format of CDCI Manual including procedures as follows:</td>
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<tr>
<td>Opening and Closing</td>
<td>HR Support Generalist</td>
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<td>Kitchen</td>
<td>HR Support Generalist</td>
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<td>Parking</td>
<td>HR Support Generalist</td>
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<td>Vacation Policy/UVM Holidays</td>
<td>HR Support Generalist</td>
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<td>Professional Attire</td>
<td>HR Support Generalist</td>
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<td>Staff and faculty evaluations</td>
<td>Business Manager</td>
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<tr>
<td>CDCI Meetings</td>
<td>Business Manager</td>
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<tr>
<td>Shared Responsibilities</td>
<td>HR Support Generalist</td>
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<tr>
<td>Work Requests</td>
<td>HR Support Generalist</td>
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<tr>
<td>Computers and Computer Communication</td>
<td>IT/Web Specialist</td>
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<tr>
<td>Active Directory/Shared Folders</td>
<td>IT/Web Specialist</td>
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<tr>
<td>CDCI Website</td>
<td>Business Manager</td>
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<tr>
<td>Complete “Preventing Sexual Harassment” Online training (copy of certificate to HR Support Generalist)</td>
<td>UVM Training</td>
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<td>Safety Training/Fire Drill Procedures</td>
<td>Business Manager</td>
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<td>Office Equipment</td>
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<td>Copying and Faxing</td>
<td>HR Support Generalist</td>
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<td>Office Supplies</td>
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<tr>
<td>Purchasing</td>
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<td>CDCI Travel Guidelines</td>
<td>Business Support Generalist</td>
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<tr>
<td>PeopleSoft Training Recommendation and sign-up</td>
<td>HR Support Generalist</td>
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<tr>
<td>Schedule Meeting with Director, Review AUCD Modules and CDCI Mission, Values etc.</td>
<td>HR Support Generalist</td>
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</table>
**CDCI Orientation Checklist for Independent Contractors/Temporary:**

New Employee Name:

Primary Project Coordinator:

Project Name:

<table>
<thead>
<tr>
<th>Orientation Activity</th>
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<td>HR Support Generalist</td>
<td></td>
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<tr>
<td>Name and email give to Michaela Collins to add to ListServes</td>
<td>HR Support Generalist</td>
<td></td>
</tr>
<tr>
<td>Emergency Contact information obtained</td>
<td>HR Support Generalist</td>
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Staff and Faculty Evaluations

Personnel Definitions

UVM Administration
- Executive Director

UVM staff
- Program staff
- Administrative staff and Temporary Wage workers

UVM full-time faculty
- 9, 10 and 12 month appointments of .75 FTE or higher

CDCI and UVM part-time faculty
- 9, 10 and 12 month appointments of less than .75 FTE

Performance Appraisals

- The performance appraisal is a communication tool designed to support your individual contributions to the University. It provides a way to measure skills and accomplishments with reasonable accuracy and uniformity and a way to identify obstacles to top performance. It should help identify areas for professional growth. In addition, open lines of communication throughout the year keep barriers from rising and encourage effective working relationships.

- General University practice is for you to receive a thoughtful appraisal each year although you may be evaluated more than once in a year.

- The Executive Director receives an evaluation from the Dean of the College of Education and Social Services.

- Faculty reviews are done yearly using the form developed for CDCI based on the CESS/UVM requirements. Each Spring faculty:
  - Complete Annual Review form
  - Complete Workload Agreement forms - reflect the activities expected to be completed during the next year, which must reasonably match FTE.
  - Review and sign forms in meeting scheduled with Susan Ryan
    - Submit current Vita

- Every four years, or for promotion, designated faculty participate in a "blue sheet" review, which entails more documentation and review.
Faculty Evaluation Sheet is on the following page and is available on the UVM website at http://www.uvm.edu/provost/.

Staff reviews are completed yearly with the Executive Director using the UVM form. These are completed by the staff and supervisors separately who then meet to review performance and to set goals for the year.

The Staff Performance Appraisal/Self Appraisal Form can be found on the following pages.

Faculty and staff should maintain records related to their achievements and participation in various groups, trainings and other professional activities. These will be useful for including in Center data collections, annual or reappointment reviews, and vita updates.

The faculty that are part of the CDCI have been tasked with fulfilling a mission that requires a different application of their skills. The activities and responsibilities may not be familiar to other faculty that are part of a more traditional department. The University recognizes that there is value in the CDCI projects and allows for evaluation of the faculty in a manner that relates performance to the mission and goals of the project.

The Annual Review and Workload Agreement of CDCI faculty are reflective of CDCI's Mission and the Core Functions, and specifically related to the Goals and Activities of the project(s) each faculty is engaged in.
Faculty Performance Appraisal:

Chairperson’s Annual Performance Review Summary Form
UVM Center on Disability & Community Inclusion
College of Education and Social Services

Faculty Member:
Appointment Title:
Status (FT/PT):
Project(s) & % (s):

The information presented below is a summary of my assessment of your performance (progress, areas of strength and those in need of improvement) over the past year (but will take into account the past two years) with respect to your Faculty Workload Plan for FY X-Y and the DOE performance criteria provided in the DOE annual review performance guidelines.

AREA 1 – TEACHING

AREA 2 – SCHOLARSHIP

AREA 3 – PROFESSIONAL SERVICE

Recommendation(s) for 2011-2012:

Faculty Member: I agree with the evaluation. Faculty Member: I disagree with the Chair’s review. I realize I have the option to write a rebuttal.

__________________________ ______________________________
Chair, Department of Education Date
Faculty Workload and External Employment forms can be found here:

http://www.uvm.edu/~facrsrscs/?Page=workload_forms.html

Staff Performance Appraisal Forms can be found here:

http://www.uvm.edu/hrs/?Page=forms/forms.html

Exit Interview Procedure

For employees planning to end their contract of employment with CDCI due to retirement or resignation:

- A resignation or retirement letter must be submitted to the Human Resource Support person, your direct supervisor, and the Center director. The business office and exiting employee should then insure that all equipment including computers and keys are returned to CDCI.
- An exit interview needs to be conducted between the supervisor and the exiting employee.
- The data coordinator needs to be informed and all activities and products need to be entered into NIRS before the exiting employees last day.
- All vacation should be used before the termination of the contract.
Gifts and Donations

The following outlines the center's policy for gifts and donations.

- A request for donations towards a gift will be sent out by the Human Resource Support Person for important life events such as: baby announcements, marriages, relocation, change in employment, and graduations.

- A donation in lieu of flowers in the amount of $50.00 will be made upon the death of immediate family members (parents/guardians, step-parents/guardians, parents-in-law, spouses, and children) of CDCI staff or faculty.

- A tangible gift (not cash) or a donation in the employees name will be purchased by CDCI in the amount of $100.00 upon retirement of a CDCI staff or faculty member.
**Time Off**

**Sick Leave**

- CDCI staff that need to take sick time should contact their supervisor via a phone call or with an email (copy to the Business office or Human Resource support person) as well as any colleagues impacted by their absence as soon as possible. Time off needs to be logged into PeopleSoft and reflected in your sick leave bank.

- Faculty working at the Center should notify Center staff if they will not be in. Faculty working off site should notify their Project Coordinator and as well as any colleagues impacted by their absence. Center staff receiving notice should email the Executive Director, and affected Program Assistants.

- CDCI staff and faculty who are absent for an extended period of time should contact their Project Coordinator and the CDCI Executive Director regarding their plans to return to work including potentially filling out leave of absence paperwork with UVM Human Resources (contact the Human Resource Support person with questions). Since we are grant funded, there is no funding to hire replacement personnel. Duties will need to be reallocated to minimize the impact of absences.

**Compensatory, Over Time and Flex Time**

- Compensatory and Over Time cannot be taken without prior approval of the Faculty Supervisor and the Project Director using a Compensatory/Over Time agreement form. Also, prior to approval, the staff member will state in writing what kind of compensatory time he/she will be asking for: Over Time is paid time and one-half, Compensatory is leave time and one-half. It is the policy of UVM sponsored projects that wherever possible Flex Time within the pay period is used rather than OT or Comp time.
Vacation and Holidays

- CDCI staff wishing to take vacation time must notify the Business Manager via the Oracle Vacation Calendar and their direct supervisor (usually a Project Director). This information will need to be logged into PeopleSoft by the employee upon return to work.

- Only faculty members on 12-month appointments earn vacation. Because our work is grant funded 12-month faculty will not be reimbursed for any vacation time left unused at the time of termination of their duties at CDCI.

- Both faculty and staff, after notifying their direct supervisor of vacation, will enter this vacation time in the CDCI Vacation Calendar on Oracle. See Appendix 13 for instructions.

- Vacation days for non-12-month faculty are the official University holidays and the time from December 23 to January 2. All faculty members are to be available for work assignments one week before semester and one week after commencement.

- In addition to the UVM holidays, CDCI may close at noon the day before the Thanksgiving, Christmas and New Year Holiday at the discretion of the Dean. If granted, Staff and Faculty working that day do not have to take a vacation day to cover this additional half-day off.

- The CDCI Staff Vacation Internal Practice found on the following page guides CDCI staff.

- The CDCI Vacation Request Form should be submitted to your supervisor for approval before vacation is taken: [http://www.uvm.edu/~cdci/employees/files/vacationrequest.pdf](http://www.uvm.edu/~cdci/employees/files/vacationrequest.pdf)
Reason for Practice
This internal practice is required to be accountable and responsible to the Center on Disability and Community Inclusion, the funding sponsor, and the ongoing ability to accurately predict the staffing levels of CDCI. It also is a practice to ensure staff are able to use and enjoy their benefit of vacation time.

Business Practice Focus
Staff will: (a) take their vacation within the grant funding period under which they are funded; and if their grant(s) continue the next year (b) not carry forward more than 5 days from the current budget period end.

Strategic Direction
This strategy supports the direction and goal of CDCI to be programmatically and fiscally responsible to all grants and contracts.

Application of the Practice
This internal CDCI practice outlined in this document applies to all CDCI grant funded staff. It is intended to be applied by all project directors/coordinators and overseen by the Business Manager.

- Employees are expected to request approval for time off to their director/coordinator well in advance of the dates, and copy the Business Manager to track the time.

- Directors/coordinators are expected to meet with the employees more than once a year to discuss vacation dates.

- Whenever possible, vacation dates should be established (approval) at least a month prior to the absence.

- Business Manager will notify Directors/coordinators at monthly of balances higher than 5 days.

- A written plan for using vacation days will be submitted to the Business Manager at least once a month.

Related Documents
Attached documents include Plan for Use of Vacation Days (see Appendix 14).
Computers
Computer Communication

Email

- CDCI follows the UVM standard email format: firstname.lastname@uvm.edu

- This standard clearly identifies your name, is usually easier to remember, and is generally regarded as more professional in appearance.

- The standard email format will be used for all CDCI listservs.

Listserves

- The Human Resources support person maintains the listservs for the CDCI personnel. Please notify if there are changes to your email address that need to be reflected in one or more listserv.
  - There are two listservs commonly used at CDCI. They are:
    - CDCl@list.uvm.edu: all CDCI faculty, staff and affiliates
    - cdcimanhall@list.uvm.edu: all CDCI staff and faculty with offices on Mann Hall 3rd floor.

Web Site

- Our Dissemination Coordinator maintains and updates the CDCI website. Anyone who wants to add information to the site can call or email to make an appointment to discuss the content and format of the information.

- Dissemination collaborates with IT on the content of the website, including posting the latest CDCI news. Please let the Dissemination Coordinator know if you have any information you’d like included in the news updates.
PURPOSE: The purpose of connecting to the UVM VPN is so that you can access resources within the UVM network, such as the SHARED drive. So when do you need to be connected to VPN? When you're on campus and connected to the UVM WiFi -- Cat's Paws and when you on the road or at home. The only time you won't need to connect to the VPN is when you're on the UVM campus and hardwired into the Internet.

1. Make sure the Cisco VPN client software is installed. If it's not, then visit the UVM software download site to download and install it (http://www.uvm.edu/software/). You will need to provide your Net ID and password to access the download section. If you're not sure if it's installed have a look in your Applications folder, there should be an application called "VPNCclient".

2. Once you've verified that you have the Cisco VPN software, open it. Click on the Connect button.

3. A dialog box will come up asking for a username and password. Input your UVM Net ID information and hit Ok.

4. You are connected!

For further information on connecting to the CDCI Share Drive from off campus please see the CDCI Employee Resources Page:
http://www.uvm.edu/~cdci/employees/files/ConnectToCDCIShared.pdf
UVM GuestNet::About

What is UVM GuestNet?
UVM GuestNet is an easy way for current UVM students, faculty, and staff to grant (or "sponsor") temporary Internet access to their visiting colleagues, families, and friends.

http://www.uvm.edu/it/wireless/?Page=guestnet/guestnet.html

How does it work?
There are a few possible variations, but most often, it works like this:

- Guests who would like to use their own computer to access the Internet while visiting UVM's campus ask the person they are visiting to sponsor temporary access for them.
- That UVM affiliate logs into this system using their Net ID and creates a "sponsored account" for their guest, then gives the resulting Login Name and Password to the visitor. This sponsored account will have a finite lifetime. For most UVM affiliates, the maximum is seven days from the date of creation.
- The visitor uses their computer to connect to a wireless network called "UVM Guest" and attempts to visit a website. At this point they are asked to enter the Login Name and Password given to them by their sponsoring affiliate.
- After successfully entering the Login Name and Password, the visitor is able to access most of the Internet resources they are accustomed to using from elsewhere (websites, webmail, instant messaging, etc.).
- Once the sponsored account's lifetime has expired, the visitor is no longer able to use the Internet from the UVM Guest wireless network. If appropriate, their sponsor may choose to create a new account for them at this time.

Who can use the UVM Guest wireless network?
Visitors to UVM's campus who are the guests of current UVM students, faculty, and staff and who have their own laptop computer may use the UVM Guest wireless network. This is an open network, and users must take appropriate precautions to protect their own communications, if those communications are sensitive. Users must take appropriate precautions to protect their own computers from intrusion. UVM disclaims all responsibility for any data loss, security compromise, or other harm suffered by guests' computer hardware, firmware, and software while connected to the UVM Guest network.

Who can sponsor access?
Current UVM students, faculty, and staff can sponsor temporary guest access.

What are the sponsor's responsibilities?
UVM students, faculty, and staff who elect to sponsor temporary Internet access for their guests are entirely responsible for those guests' use of the system and the Internet. The creation of every sponsored account and its use of the UVM Guest wireless network is logged, and your Net ID is in every one of those log messages. Please carefully consider the implications of this when sponsoring visitors' access.

How do I sponsor guest access?
Visit the Manage Your Sponsored Accounts page and fill in the form titled "Create a New Sponsored Account". A few notes:

- Be sure to enter something meaningful (to you, that is) in the "User's Full Name or Description" field: if a complaint investigation leads the Enterprise Technology Services staff to your sponsored account, this information must help you remember the visitor for whom the account was created.
- The automatically generated password for your sponsored account is case-sensitive. (In other words, your guest must enter their password with exactly the combination of capital- and lower-case letters shown.)
- The login information for your current sponsored accounts is always visible on the Manage Your...
Sponsored Accounts page under the section titled "Your Sponsored Accounts".

If your position requires that you sponsor more than the maximum number of concurrent guests (five), or need your sponsored accounts last longer than seven days, please contact the ETS Helpline through Footprints or by calling (802) 656-2604.

What kind of access do guests get?

Users of UVM GuestNet will have controlled, bandwidth-limited access to the Internet. GuestNet will NOT allow access to UVM's on-campus services. UVM's public services (www.uvm.edu, Webmail) are accessible to users of GuestNet, but this access will be treated as though it originates from a remote site. Consequently, GuestNet is not an appropriate vehicle for users who have a valid, current Net ID. Current UVM students, faculty, and staff must use the "Cat's PAWS" wireless network and the appropriate virtual private network (VPN) software in order to access UVM's campus resources and receive support.

Certain Internet resources may not be available to users of UVM GuestNet. Notably, these include:

- The ability to send mail using an email program like Microsoft Outlook, Mozilla Thunderbird, or Apple Mail unless the visitor's ISP supports the "SMTP Submission" protocol and the visitor's email program is correctly configured to use this service; support for email clients is beyond the scope of UVM's support for the GuestNet service, and visitors experiencing such problems should be directed to either use their ISP's webmail service or contact their ISP's technical support for assistance; and
- The ability to use certain virtual private network (VPN) software.

I am planning an event or conference, and want my attendees to have Internet access. What do I do?

If your event is being handled by UVM Conference & Event Services, you may request that they provision temporary access for your guests. Otherwise, if you need to sponsor more than the maximum number of concurrent guests (five), or need your sponsored accounts last longer than seven days, please contact the ETS Helpline through Footprints or by calling (802) 656-2604.

Where can I (or my visitors) get help using GuestNet?

GuestNet sponsors may contact the ETS Helpline through Footprints or by calling (802) 656-2604. Visitors should start by asking their sponsors for assistance, and then call the Helpline at the number above if necessary.
File Transfer Service

University Communications
Sharing Large Files with the File Transfer Service

Author: Dean Jay Williams
Email: Dean.Williams@uvm.edu
Phone: 802/656-1174 Fax: 656-0872 or 656-8148

Most email providers, including UVM, restrict messages to a certain maximum size, or prohibit certain types of attachments. It can be frustrating or impossible to share files ranging from PowerPoint presentations to multimedia files via email. Fortunately, there is an easy way to exchange files large and small without resorting to email attachments.

The File Transfer Service is a good way to share individual files up to 1 GB in size. This file transfer method is perfect for collaborating with people in other educational institutions, vendors, departments, and professional organizations.

UVM affiliates can send large files to other UVM affiliates or to recipients outside of the UVM email community. Also, people outside the UVM email community can use the File Transfer Service to send large files to UVM affiliates. The sender can request a confirmation that the recipient has received the file.

To use the service, simply visit http://www.uvm.edu/filetransfer.

Your comments and suggestions on this service, as with other ETS services, are always welcome at ets@uvm.edu.

For help with the File Transfer Service or other technical questions, please contact the UVM Computing Help Line at 802-656-2604 or online.
Active Directory / Shared Files

- Faculty and staff of CDCI have access to the Active Directory on the UVM server, which contains folders of information that can be shared.

- The Business Manager is responsible for overseeing access to the folders. Each folder, sorted by topic or Project name, is associated with a set of allowed users. This list of people, provided by the creator of the folder, can view, save, edit and add to the files in the folder.

- The steps to accessing the Shared Folders are:
  1. Check that your name has been given to the IT Specialist for access to the file you wish to open.
  2. On your Mac, select “Connect to Server” from the menu bar and type the following server name: `cifs://files.uvm.edu/shared`
  3. On your PC, choose Start → Run and type: `cifs:\files.uvm.edu\shared`
  4. Type in your net ID (where it asks for “name”) and Password in the boxes indicated.
  5. Choose the folders `CESS, Departments`, then `cdci`
  6. Open the desired folder.

- Be patient, the server can sometimes get bogged down or run slowly.

- If you want to work with a document (e.g. open and read it, save a copy of it, make changes to it), click and drag it to your desktop first. This will create a copy of it so that you do not tie up the document on the server.

- As a rule, do not edit documents that you have not created. If you are asked to view and give feedback on a form, determine how the creator would like that done. If various people are making edits to the same document the original will be lost and there may be conflicts on the server.

- The Shared Folders are a convenient and cost effective way to distribute information, such as meeting minutes, agendas etc. All Projects, boards and groups will have a folder to which they can upload these documents.
PURPOSE: The SHARED drive allows you to store files on a remote server so that you can access them from any computer that's connected to the Internet. You can also use it to share files with other people (so long as you store them into a folder where both have access). Files you might want to store on there could be Word documents, images/pictures, Excel spreadsheets, and any other files you might want shared amongst people within your project.

1. While in Finder hit Apple/Command + K. This brings up the Connect to Server dialog box.

   You can also get to the Connect to Server dialog box by clicking on Go within the menu bar (that white bar at the top of your screen) and then selecting "Connect to Server" from the menu that comes down.

   (If you are not on campus you will have to be connected to VPN to access the shared drive - see instruction for Connecting to VPN.)

2. In the Server Address field input: cifs://files.uvm.edu/shared. You might want to add it to your favorites so you don't have to type it in every time. You can do this by clicking on the "+" button to the right of the address field. Now click on the "Connect" button.

3. A new dialog box will pop up after you hit Connect asking for a username and password. Input your UVM Net ID information.

4. Once authenticated you'll want to navigate through the following folders to get yourself into the CDCI folder: cess --> Departments --> cdci.

For further information on connecting to the CDCI Share Drive from off campus please see the CDCI Employee Resources Page:
http://www.uvm.edu/~cdci/employees/files/ConnectToCDCIShared.pdf
ACCEPTANCE OF COMPUTER FOR PROJECT USE:

(Your Name)_____________________________ acknowledges receipt of computer hardware or software as described below:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

These materials were purchased through the sponsored agreement __________________

________________________________________________________________________

and will be used solely for that agreement’s benefit. Should you leave the project supported by the agreement, you agree to return these materials to the University of Vermont, Center on Disability and Community Inclusion.

________________________________________________________________________
Signature of Recipient/Date

________________________________________________________________________
Signature of IT Specialist/Date

________________________________________________________________________
Signature of Business Manager/Date
Office Equipment

Office Equipment

- Copiers, lamination equipment, and other Center owned equipment is available for use in the common area (conference room area).

- Repairs made to office equipment owned by CDCI as a whole (e.g., copier, fax) are arranged by the Business Office.

- In some instances, where the repair may be major (e.g., computers, cameras), the request is made by the Business Office.

Other Equipment

- Equipment to be purchased for a specific Project is paid for out of individual budgets and should follow the following procedures:
  1. Project Coordinator approves purchase and completes a Purchase Request Form.
  2. The Business Manager ensures the funds are available in that project's budget, and then signs the request form.
  3. A copy of the signed form is given to the person designated on the form to place the order: the Project support staff (see CDCI Personnel List in Appendix 2) or the Project Coordinator.

Repairs to equipment specifically related to a current Project should follow the same procedure as equipment purchase, above.
Transfer Call

1. Press Transfer Button
2. Dial Extension#
3. Press transfer button again

To Forward Phone Line

1. Press forward
2. Enter phone number of person that will be answer the phones
3. Press forward again

Telephone Conference Call Procedures

1. Get everyone's phone numbers that are to be included on the Conference Call

2. Pick up phone and call the first number, once you reach the first person, hit conference, this places the first person on hold then...

3. Call the next number, hit conference again this places the first person and all others together. Say..."Susan, I have Marie on the phone...etc. for each person that is added to the conference call.

4. When all parties are connected hit conference for the last time and everyone should be there.

NOTES:

1. Phone in conference room will not work in other phone jacks.
2. If you want to be on a speaker phone you can use hands free mute
3. When placing calls you must use UVM phone policy to dial out e.g. long distance 8 - 0 - 1 - area code .... and your access code; 800 numbers are 9 - 1 - 800...; if you get a busy signal hit conference and go to the next number and come back later to that number


Copiers and Fax Machines

- Please use the copy code associated with your project. The cost of the copies is deducted from each project’s budget. If you do not know your copy code, ask the Business Office.

- Please let the Business Office know if you are planning to make a large number of copies (e.g. 3-4+ reams of paper) so that they can ensure that there is sufficient quantity of paper for your job as well as for the general Center use.

- Please be courteous and try not to tie up both printers/copiers at the same time for large print/copy jobs as this prevents your co-workers from being able to use these machines.

- If the copy machine malfunctions or shows an error message, please attempt to fix it on your own before making sure to tell the Business Office immediately so that we can call for repairs if needed.

- Faxing requires a phone access code for long distance faxing. If you do not have one, please see the Business Office.

- See the Business Office if there are any problems or questions about copying or faxing.
Office Supplies

Office Supply Procedure:

- Supplies or materials for a specific Project, including conference supplies, are paid for out of individual budgets and should follow the following procedures:
  1. Project Coordinator approves purchase and completes a Purchasing Request Form see below.
  2. Business Manager ensures the funds are available in that project's budget, and then signs the requisition form.
  3. A copy of the signed form is given to the person designated on the form to place the order: the Project support staff or the Project Coordinator.

- Large Print Orders: When a PMC Card is used to order a print job, please fill out a Purchasing Request Form (see Appendix 12) with the Print and Mail Center as the vendor, and the quantity and item information. The Project Coordinator needs to sign off on this form and then it should be submitted to the Business Manager for approval prior to the order being placed. Furthermore, all receipts sent from Print and Mail should be forwarded to the Business Office.
## Purchasing Form

![Purchasing Form Image]

### Center on Disability and Community Inclusion Manual

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**Vendor:**

- **Name:**
- **Address:**
- **Phone #:**

**Requisitioned by:**

- **Name:**
- **Phone #:**

**Type of Payment:**

- **Purchase order**
- **PurCard**
- **Internal**

### Item Table

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**TOTAL:** $  

**Project Director:**

- **Name:**
- **Signature:**
- **Date:**

**Address:** Mann Hall 3rd floor, 208 Colchester Ave, Burlington VT 05405

**Authorized Signature:**

- **Date:**

**If Technology, IT and Web Specialist:**

- **Signature:**
- **Date:**

**Business Manager:**

- **Signature:**
- **Date:**

**Items Received by:**

- **Signature:**
- **Date:**

---

Macintosh-HD:FORMS:REQUISITION FORM 9 23 10.xls Purchase sheet
Shared Materials
Software

- Each piece of software owned by the Center can be downloaded onto a limited number of computers, depending on the number of licenses purchased. IT specialist keeps track of these licenses, but each person is responsible for ensuring they have legally licensed versions of the software on their computer.

- All software purchased by CDCI is inventoried, logged, and stored with IT. To ensure that programs are available when they are needed, anyone borrowing software will need to sign it out with the business office.

- Requests for software programs that are for the Center (a program used across projects) should be directed to the Business Office for initial approval.

- Software to be purchased for a specific Project is paid for out of individual budgets and should follow the following procedures:
  1. Project Coordinator approves purchase and completes a Budget Request Form.
  2. Business Manager ensures the funds are available in that project's budget, then signs the request form.
  3. A copy of the signed form is given to the person designated on the form to place the order: the Project support staff (see CDCI Personnel List in Appendix 2) or the Project Coordinator.
Adobe Connect

Adobe Connect is a computer based web and video conferencing tool.

For information on how to plan and conduct a CDCI webinar using Adobe Connect, please see the CDCI Employee Resources page “How To” instructions under the heading How to Plan and Conduct a CDCI Webinar:

http://www.uvm.edu/~cdci/employees/?Page=howtos.html

Microsoft Exchange:

Microsoft Exchange is the UVM supported email and calendaring software. Visit this link for more information: http://www.uvm.edu/it/email/

Audio-Visual Equipment

- For those who wish to sign out equipment (laptops, projectors, digital camera, flip video camera, tripod, speakers and digital recorder) please see the IT Specialist here at the Center. If not at their desk, the next person to see is Business Office.

- Equipment can be signed out for a week at a time, but should be returned after that. RETURN TO A PERSON PLEASE! Your equipment is not considered returned unless one of us has signed it back in. Under no circumstance should you leave it in Steve’s office, or anywhere else unattended.

- Equipment in our Central Copy Room area is not meant to be available for sign out.
NIRS Database

- National Information and Reporting System (NIRS) is a database system developed to ensure UCEDD compliance with Federal data reporting requirements. These data are also used to support program management, long-range planning, yearly reports and information sharing efforts.

- CDCI has a NIRS Data Coordinator (see CDCI Personnel List in Appendix 2 for current coordinator).

- We must report specific data, in a specific way, if we want to continue to receive federal Core funding. All faculty and staff must enter their data for any grant or project or university related activities.

- Data must be entered monthly and before the end of the fiscal year. The Executive Director may need to generate a report at any time and needs to be sure that the information entered is current.

NIRS Data Entry

New employees should contact the NIRS Data Coordinator to obtain a user id and password and for initial instruction on how to enter data into NIRS.

Also contact the NIRS Data Coordinator if you have forgotten your NIRS user id and/or password, or need a refresher on how to enter data into NIRS.

“Data Dictionaries” are available in the pull-down menus for both Activities and Products and are quite helpful on defining the fields for data entry and the choices for field selection.

For step-by-step “How To” guides for entering NIRS Data please see the CDCI Employee Resources Page: [http://www.uvm.edu/~cdci/employees/](http://www.uvm.edu/~cdci/employees/)
Money
**Purchasing**

- The **Purchasing Request Form** can be found under “Office Supplies” in this manual.

- Each Project has its own budget and allocation of funds within the budget. The Center runs on grant funding and there is no system for handling unexpected expenses or overages, so it is critical that all Projects stay within their allotted funds.

- Monthly budgets will be generated for each Project. These will be sent to the Project Coordinators and a copy will be kept in the Business Office.

- When a **Purchasing Request Form** is submitted, the Business Manager will check the Project’s budget statement on the computer and determine if there is sufficient money to cover the request. The request will be approved, denied, or the submittor will be asked for additional information.

- Project expenses are paid for out of individual Project budgets and should follow the following procedures:

  1. Project Coordinator approves purchase and completes a **Purchasing Request Form**.

  2. Business Manager ensures the funds are available in that project’s budget:
     - If the money is available, the request will be approved.
     - If the money is not available, the request will be denied.
     - If there is some question about the availability of funds or the nature of the request, the Business Manager will contact the person submitting the request.

  3. A copy of the signed form is given to the person designated on the form to place the order: the Project support staff or the Project Coordinator.
     - The complete form and receipts will be forwarded to the Business Office.

- The purchasing request form contains space for indicating the exact items for purchase. If desired, the form can be forwarded to the appropriate person for ordering once it is approved. The Project
Coordinator can also choose to have the form returned to them for next steps.

- For CDCI personnel using PurCards they should follow the same procedures as above for pre-approval of the Project’s available budget. Receipts for these purchases should be kept with the Purcard documentation and given to the Business Office for PurCard Reallocation.

- ALL PURCHASES THAT CAN BE MADE VIA PURCARD NEED TO BE MADE VIA PURCARD. This includes but is not limited to:
  - Office supplies
  - Other supplies
  - Hotels
  - Car Rentals
  - Airfare
  - Conference Registrations
Travel
CDCI Travel Guidelines

- Travel is often necessary for the conduct of University business and therefore the University expects to incur reasonable and necessary, travel expenses. Travel expenses paid by UVM must be properly authorized, appropriately documented with a clear business purpose, and comply with the CDCI and UVM guidelines.

- The Out of State Travel Notification is completed for all faculty and staff traveling out of state, and submitted to the Project Coordinator, then Business Manager, then Executive Director for approval. A link to this form can be found here: [http://www.uvm.edu/~cdci/employees/files/FacultyoosNotification.pdf](http://www.uvm.edu/~cdci/employees/files/FacultyoosNotification.pdf)

- All CDCI faculty and staff should complete the travel training with the Business Office PRIOR to initiating travel on University business. No travel should be entered into Peoplesoft. Send the completed expense form and receipts to the CDCI Business Manager.

- Requests for travel are paid for out of individual grant budgets and should follow the following procedures:
  1. Project Coordinator approves travel request and completes a *Purchasing Request Form* with ticket information.
  2. Business Manager ensures the funds are available in that project's budget, and then signs the request form.
  3. A copy of the signed form is given to the person designated on the form, the Project support staff or the Project Coordinator.
    - The complete form and receipts will be forwarded to the CDCI Business Office. The CDCI Business office will verify the chartstring and then send the form and receipts to ABSC for processing.

MILEAGE

- Mileage is now paid out at $0.54 per mile.
- Airport parking cost will only be reimbursed for the duration of the UVM business. Parking fees incurred beyond the conference dates for personal reasons will not be reimbursed.
RENTAL CAR

- UVM employees must use Hertz (802-859-3601)
- Cost for car rentals must not exceed the cost of a coach airfare ticket to your destination. The cheapest mode of travel must always be used.
- Traffic violations are not reimbursable.
- Subcompact, compact or midsize cars are allowable. Anything beyond this will need additional approval.
- UVM insurance covers for liability, but employees must purchase a collision damage waiver.

AIRFARE

- Coach airfare is the only allowable airfare. Only the cost of the direct route, no indirect or interrupted itineraries, will be reimbursed.
- Please review terms and conditions for cancellation or service fees. Provide documentation and explanation for these charges.
- Reasonable baggage fees are allowable.

LODGING

- Reasonable hotel lodging is reimbursable.
- No paid TV or Internet charges for other than UVM Business are allowed.
- All hotel costs should be charged to the traveler's personal credit card.
- Lodging expenses are the only expenses that may be charged to the purcard. Any additional expenses (such as room service or parking etc.) must be paid by the traveler and submitted for reimbursement on a travel expense report.

TRAVEL MEALS

- Meal Allowance is up to $60.00 per day, maximum, only on travel that requires an overnight stay.
- CDCI requires all original itemized receipts.
- Groceries in lieu of meals are allowable but the same daily maximum applies.
- Alcohol is not allowable
- You will not be reimbursed for any meals that are already provided by the conference you are attending.
- Conference agendas are required as part of documentation.
GRATUITIES

- Gratuities should be limited to 15-20% for a meal. Excess gratuities are not reimbursable.
- Gratuities must be on pre-tax amount on receipt.

CDCI RECEIPT REQUIREMENTS

- Original itemized receipts are required for all reimbursement requests. (Traveling in Developing Countries allows for tracking expenses with a daily log.)
- All receipts should be mailed to the CDCI Business Manager along with the completed expense form.
- Please do not highlight any areas as they scan as black and are unreadable.

NONALLOWABLE EXPENSES

Landry, dry cleaning valet, spa, fitness center, paid TV, personal travel insurance, child care, guest travel.
Please remember to follow these steps.

Travel that is completed without first obtaining the signed approval of funds available from the Business Manager or Project Coordinator will not be reimbursed!

- If you will be out of state, even for a day, you must complete the out-of-state notification form described above and submit it to the Business Office prior to travel. This is a safety measure, ensuring that faculty and staff are accounted for in the case of an emergency.

- It is not necessary to complete a travel form if the trip is not part of your job and you are not seeking reimbursement.

- Travel arrangements (e.g. lodging, flights, rental cars) and reimbursement (e.g. submitting receipts) are the responsibility of the traveler. The Business Office will collect your completed forms and documentation but are not equipped to act as travel agents.

- If travel is being charged to a sponsored project or grant and the terms of the project are different from UVM’s, the more restrictive terms will apply.

- To ensure accurate tracking of grant expenses the traveler must complete and submit the expense form and receipts to the CDCI Business Manager within twenty days of the travel.

- In addition to the CDCI requirements, travel by CDCI personnel must adhere to all travel requirements of UVM. This Travel section contains just some of the highlights of the Travel Policy (https://www.uvm.edu/policies/travel/travel.pdf) PeopleSoft Reimbursement procedures that are important to CDCI.
In-State Car Travel

- Use of personal automobiles is reimbursed on a mileage basis and covers gas, oil, maintenance, and depreciation of the vehicle. Travel for personnel who have an office at the Center can only be clocked from the Center to the destination and return. Personnel who have an office somewhere other than the Center would calculate mileage from their usual place of work to the destination and return.

- Reimbursement for frequent or regular instate travel (e.g. mileage reimbursement) must be done within twenty days of the travel in order to be reimbursed.

- Center Personnel are encouraged to carpool and find alternatives to on-site meetings and visits when appropriate to reduce fuel costs.
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Travel Cash Advance

- It is possible to collect funds prior to travel, called “cash advance”, if you have submitted your request at least 10 days before your travel. The cash advance should be processed through the Disbursement Center prior to travel.

- Cash advance payments take 7-10 days to process. You can check the status of your payment at:
  
  http://www.uvm.edu/~training/peoplesoft/guides/AP_Review_Payments_Information_11-16-06.pdf

- If you receive a cash advance, you are responsible for submitting receipts that add up to the amount received. If you do not have the receipts needed, you will need to write a check for the difference.

- If you cancel your travel for any reason, you must contact the Cashier’s Office to cancel the cash advance.

- Processed checks are printed at an off-site location and brought to Waterman at 1pm each day. Checks received that day are available in the Cashier’s Office after they are retrieved from the mailroom and logged (best to call or stop in after 3pm, but before they close at 4pm).
Travel Receipts

Once travel is completed, a signed printed Expense Report and receipts must be submitted to the Business Office within 20 days. Original, itemized receipts are required for all expenses and should be taped to an 8 ½ x 11 page in chronological order. Allowable expenses are numbered below, along with their restrictions:

1. **Hotel/Motel** CODE: 60502
   - All personal expenses such as laundry, dry cleaning, pressing, valet services, hotel spa or fitness center, paid television, personal travel insurance, internet, child care, pet care, guest travel, etc. are not reimbursable.
   - Always ask for corporate or educational discount rates before renting a room. No paid TV or other personal entertainment items will be paid for or reimbursed.
   - Reimbursable phone expenses are limited to UVM business phone calls. Personal phone calls are not reimbursable.

2. **Rental car and associated gas** CODE: 60504

3. **Rail, taxi, parking, tolls or bus fare** CODE: 60505
   - Select the least expensive mode of ground transportation that is appropriate.

4. **Meals while on travel status** CODE: 60503
   - Actual meal expenses, including reasonable tips, are not to exceed $55 per day. This is a guideline and not a fixed per diem and is updated as needed
   - Meals in lieu of those included in conference registration fees are not reimbursable.
   - Meal expenses incurred on trips that do not require an overnight stay are not reimbursable.
   - **Alcoholic beverages are not an allowable expense** and will not be reimbursed. Receipts including alcoholic beverages will not be accepted, so please obtain separate receipts for food and drink.

5. **Airline Tickets and luggage expense** CODE: 60501
   - A copy of the e-mail receipt with itinerary, passenger's name, cost and transaction date is acceptable
   - If you take an indirect route or interrupt your travel for other than University business, any resulting additional expense is your responsibility

6. **Non-travel supplies while on travel status** CODE: 60001 for office supplies.
APPENDIX 1

CDCI Annual Report

To obtain a current copy of the CDCI Annual Report please go to the website listed below.

http://www.uvm.edu/~cdci/reports/
APPENDIX 2

UVM Calendars

UVM Administrative Holidays

To view a list of current Administrative Holidays please visit:

http://www.uvm.edu/~uvmpr/?Page=adm
inholidays.html&SM=eventssub.html
Payroll Schedule

To view a current UVM Payroll Schedule please visit:

https://www.uvm.edu/~cntrllrs/?Page=payroll/schedules.html&SM=payrollmenu.html
APPENDIX 3

Voicemail (Callpilot) Instructions
Using standard commands

In CallPilot Multimedia Messaging, many keypad commands are common to all features. For example, Play is always 2, Record is always 5, and Help is always 9. If you learn these standard commands you can use all the CallPilot Multimedia Messaging features without memorizing every step.

When you are playing your messages, recording greetings, and recording messages, use these commands:

- Play
- Skip back
- Skip forward
- Go to previous message or return to messages
- Go to next message
- Record
- Delete/Restore
- Help
- Stop playback or recording
- Cancel menu selection
- End data entry or addressing

Logging in to your mailbox

You need a CallPilot Multimedia Messaging access number, a mailbox number, and a password to log in to your mailbox.

To log in for the first time

Your system administrator will give you a temporary password that you change the first time you log in.

1. Decide on a new password. See page 6 for help with choosing passwords.
2. Follow the login steps below, using your temporary password.
3. When you are asked to enter a new password, follow the prompts. See page 6 for instructions on changing your password.

To log in

You can log in to your mailbox from any touchtone phone. When logging in from your own phone, you may be able to press a message key instead of dialing the access number.

1. Dial the CallPilot Multimedia Messaging access number, or press the message key on your phone.
2. Enter your mailbox number, then press #. If you are at your own phone, just press #.
3. Enter your password, then press #.

You are now in your mailbox and can use all the message list commands.

To log in from a faxphone

You can log in to your mailbox from a faxphone using the Multimedia Messaging faxphone access number. Follow the steps for logging in, as described above. For details on printing at a faxphone, see Printing fax messages, page 10.

To log in using Autologin

Autologin is an option that makes login easier because you don't have to enter your mailbox and password. Your system administrator can allow secure numbers such as your office or home phone for Autologin. See Turning Autologin on or off, page 8.

To access your mailbox when Autologin is turned on, dial the Multimedia Messaging access number or press the message key at one of your specified Autologin numbers.

To disconnect

When you have finished your CallPilot session, press 83 to disconnect, or hang up.
Changing your password

When you log in for the first time, you must change your password from the one you were first assigned. After that, you can change your password as often as required.

Your system administrator sets the minimum length for a password.

To change your password
1. While logged in to your mailbox, press 84.
2. Enter your current password, then press #.
   You may see dashes instead of numbers if you have a display phone.
3. Enter your new password, then press #.
4. Enter your new password again, then press #.

If your password expires, follow the steps for changing a password.

If you forget your password, your system administrator can assign you a temporary password. Log in with the temporary password, then change it immediately.

Choosing a secure password

CallPilot prevents you from using some passwords if they are too short or too simple, or if you have used the same one recently. Also, CallPilot requires that you change your password on a regular schedule set by your system administrator.

Keep your mailbox secure by choosing passwords that are not easily discovered. Decide on a system for choosing passwords that is easy for you to remember but hard for anyone else to guess. For example, you can create a unique and easy to remember password by combining letters and numbers on your telephone keypad.

Deleting and undeleting messages

CallPilot Multimedia Messaging allows you to delete and undelete messages before, during, or after playing the message. Deleted messages are removed from your mailbox at the end of your CallPilot session. You cannot undelete a message after you disconnect.

To delete a message
While at a message, press 76 to delete it and move to the next message.

To undelete a message
Before disconnecting, return to the deleted message and press 76 to restore it.

Recording greetings

You can record external, internal, and temporary greetings. Callers from outside your organization hear your external greeting, callers within your organization hear your internal greeting. If you don't record an internal greeting, all callers hear your external greeting.

You can record a temporary greeting to tell your callers that you are away from the office. All callers hear your temporary greeting if you record one. Tell your callers the times or dates of your absence, and if you will retrieve your messages while you are away.

Keep your greetings brief and informative, and speak clearly. Check each greeting by playing it after you record it. Call your number from an external phone to check if your organization has a system greeting that plays to external callers before your greeting.

To record your greeting
1. While logged in to your mailbox, press 82.
2. Press 1 for external greeting, 2 for internal greeting, or 3 for temporary greeting.
3. Press 8 to record. Wait for the tone, then record your greeting.
4. Press # to end the recording.

To play, delete, or rerecord your greeting
While at your greeting, you can play, delete, or rerecord it.

To play your greeting, press 2.
To delete your greeting, press 76.
To rerecord your greeting, add to the end of it, or rerecord part of it, press 5 at the point in the greeting where you want to start. Record the new greeting, then press #.

The new recording erases the old one from the place where you start to re-record.

To set the expiry date for your temporary greeting

You can set an expiry month, day, and time for your temporary greeting. When the temporary greeting expires, your callers will hear your external or internal greeting.

1. While at your temporary greeting, press 9 to set the expiry date.
2. Enter the month, day, and time, pressing # after each entry.
   ➤ For the current month or day, press # only.
   ➤ For a time setting of 9:00, press 900#. For a.m., press 1; for p.m., press 2.
   ➤ For the standard expiry time of one minute after midnight on the date you specified, press # for time.
   ➤ For no expiry, press ##.

If you do not set an expiry date, or if you press # for month, day, and time, your temporary greeting will remain in effect until you delete it.

To return to your messages

When you have finished recording your greetings, press 4.
Recording your name

Your personal verification is used in your greetings and addressed messages, and in Express Messaging, Name Dialing, and Remote Notification announcements. Keep your personal verification as brief as possible, and speak clearly.

To record a personal verification
1. While logged in to your mailbox, press 89.
2. You hear your current personal verification if there is one.
3. Press 5 to record. Wait for the tone, then record your name.
4. Press # to end the recording.

To play, delete, or rerecord your personal verification
You can play, delete, or rerecord your personal verification the same way as your greetings. See Recording greetings, page 7. If you delete your personal verification, your callers hear just your mailbox number or your name spelled one letter at a time.

To return to your messages
When you have finished recording your personal verification, press 4.

Assigning a custom operator
You can offer your callers the option of leaving a message or speaking to one of your assistants or colleagues. In your greeting, tell callers to press zero if they wish to speak to this person in your absence. The custom operator number is the number of the person your callers reach when they press zero.

Ask your system administrator if you can change this number.

To review and assign your custom operator number
1. While logged in to your mailbox, press 80 for mailbox options, then press 1 to review the custom operator number.
2. A prompt tells you the current custom operator number.
3. Enter the new custom operator number.

Turning Autologin on or off
Ask your system administrator if Autologin is available to you. See To log in using Autologin, page 5.
1. While logged in to your mailbox, press 80, then 4 for Autologin.
2. Press 1 to turn Autologin on, or 2 to turn it off.

Playing your messages
CallPilot Multimedia Messaging lets you know when you have new messages. Your phone may have a message waiting light, or you may hear a special dial tone when you pick up the handset. Messages may be voice, fax, or voice and fax.

When you log in to CallPilot, your mailbox summary tells you the number of new messages in your message list and if any of them are urgent. The summary also tells you if any recorded messages are urgent and if fax messages have been printed.

Each message header tells you the sender's name, and the date and time of the message. Faxes have an ID and a print status.

To play your messages
After logging in to your mailbox, you hear the mailbox summary, then the header for your first new message. (If Autoplay is enabled, your messages play automatically.)
1. While you are in your message list, you can go to any message and play it.
   - To play the current message, press 2.
   - To go to the next message, press 6; to go to the previous message, press 4.
   - To go to a specific message, press 86, enter the message number, then press #.
   - To start over at the first message from the end of your message list, press 6.

2. When you have played your messages, press 83 to disconnect from CallPilot, or hang up. Or, you can remain logged in to use other messaging features.

To review and respond to your messages
Before, during, or after playing a message, you can use these message commands:
- To play the message envelope, press 72.
- To delete the message and move to the next message, press 76. To restore the deleted message (before disconnecting), return to the message and press 76.
- See Deleting and undeleting messages, page 10.
- To print a fax message, press 77. See Printing fax messages, page 10.
- To respond to the message, see Calling the sender, Replying to the sender, Replying to the sender and all recipients, and Forwarding a message, pages 11-12.
- Press 7 for Help on message commands.

While you are playing a message, you can use these message commands:
- To skip back five seconds in the message, press 1; to skip forward five seconds in the message, press 3.
- To speed up message playback, press 23; to slow it down, press 21. You can increase the speed up to three times, and decrease it to normal.
- To pause, press #; to continue, press 2.

Message storage
Empty your mailbox by deleting messages as often as possible. The fewer messages you have, the easier it is to find the important ones. Your played messages may be automatically deleted on a schedule set by your administrator.
Forwarding a message

You can forward a message to another mailbox, to a distribution list, or to a telephone number. You can also record an introduction to the original message. You cannot forward a message marked Private.

To forward a message
1. After listening to a message or while it is playing, press 73 to forward the message.
2. Enter the number to which you want to forward the message, then press #. Repeat this step for each additional number to which you want to forward the message.
   - For details on addressing your message, see Addressing a message, page 14, and Addressing by name, page 15.
   - If you need to cancel an address, see To cancel an address entry, page 13.
3. When you have finished entering addresses, press # again to end the list.
4. Press 5 if you want to record an introduction. Wait for the tone, then begin recording.
5. Press # to end recording your introduction.
   - To review your message, see Checking and editing your message, page 15.
   - To add options, see Adding message options, page 16.
   - To add attachments, see Adding message attachments, page 17.
6. Press 79 to send the message.

To forward a fax
You can forward a fax the same way as you forward a voice message, including recording an introduction. The recipients must have the fax option at their mailbox to receive a fax message. CallPilot tells you if your fax message was not delivered.

Follow the same steps as above. When you send the fax, CallPilot sends a fax forward header page showing the new recipient and your name or number as the sender.

Composing a message

To compose a message, you first address it, then record your message, and then send it. You can address a message to one or more people or distribution lists. Before you send a message you can edit it and add message options. You can also attach other messages, including faxes, to your new message and send them together.

To address, record, and send a message
You address a message to one or more recipients before you start recording. An address is typically a mailbox number or a distribution list number. You may also be able to address messages to other numbers. See Addressing a message, page 14. You can also address a message by spelling a person's name. See Addressing by name, page 15.

1. While logged in to your mailbox, press 75.
2. Enter the first address, then press #.
   - Continue to enter addresses followed by #.
   - See Addressing a message, page 14, and Addressing by name, page 15.
   - If you need to cancel an address, see To cancel an address entry, below.
3. When you have finished entering addresses, press # again to end the list.
4. Press 5 to record your message. Wait for the tone, then start recording.
5. Press # to end the recording.
   - To review your message, see Checking and editing your message, page 15.
   - To add options, see Adding message options, page 16.
   - To add attachments, see Adding message attachments, page 17.
6. Press 79 to send the message.

To cancel an address entry
You can cancel an address you entered while you are at step 2 above. After you have pressed the final # at the end of the list, you cannot cancel any entries. If you cancel a distribution list number, the entire distribution list is deleted from your address list.

1. Press # to cancel the last address you entered in the list.
2. Repeat this step for each address you want to cancel, erasing entries one at a time from the end of the list.
3. Return to step 3 above.