

**Enroll for online courses via PASS. Courses will be available the next day in TAP up until the date listed. All online courses have the same date: the last day of the fiscal year.**

### FY23 Checklist for Online Training

<b>NEW HIRE MANDATORY:</b>		
All new hire employees hired after 9/1/2022 will <b>automatically</b> be enrolled and receive an email regarding following courses. This will meet the requirement for FY23 Mandatory Training.		
<b>SN2301</b>	FY23 New Hire Mandatory EEO Training	
<b>SN2302</b>	FY23 New Hire Mandatory FERPA Training	
<b>SN2303</b>	FY23 New Hire Mandatory Secure Our Systems Training	
<b>SN2304</b>	FY23 New Hire Mandatory Ethics, Compliance and Fraud	
<b>SN2305</b>	FY23 New Hire Mandatory UHS Data Agreement	
<b>SN2306</b>	FY23 New Hire Mandatory HAZCOM	
<b>SN2307</b>	FY23 New Hire Mandatory Safety Orientation	
<b>SN2308</b>	FY23 New Hire Mandatory HR Compliance	
<b>SN2309</b>	FY23 New Hire Mandatory Digital Accessibility Basics	
<b>MANDATORY:</b>		
All employees will <b>automatically</b> be enrolled and receive an email regarding following courses. SAM 02.A.26: It is the responsibility of each System employee to complete annual mandatory training.		
<b>SM2301</b>	FY23 Mandatory EEO Training	
<b>SM2302</b>	FY23 Mandatory FERPA Training	
<b>SM2303</b>	FY23 Mandatory Secure Our Systems Training	
<b>SM2304</b>	FY23 Mandatory Ethics, Compliance and Fraud	
<b>SM2305</b>	FY23 Mandatory UHS Data Use Agreement	
<b>SM2306</b>	FY23 Mandatory HAZCOM	
<b>SM2307</b>	FY23 Mandatory HR Compliance	
<b>SM2309</b>	FY23 Mandatory Digital Accessibility Basics	
<b>ROLE BASED MANDATORY TRAININGS</b>		
<input type="checkbox"/>	<b>HH2305</b> Child Protection Training	<ul style="list-style-type: none"> <li>Employees working with any campus program with minors (must also complete a background check)</li> <li>Any employee in Athletics, Student Affairs or the Charter School</li> </ul>
<input type="checkbox"/>	<b>SH2301</b> Texas Medical Privacy Act	<ul style="list-style-type: none"> <li>Employees with access to any medical record</li> </ul>
<input type="checkbox"/>	<b>SH2303</b> HIPAA	<ul style="list-style-type: none"> <li>Employees with access to any medical record</li> </ul>
<input type="checkbox"/>	<b>SS2301</b>	<ul style="list-style-type: none"> <li>Campus Security Authorities for UH Campus</li> </ul>

	CSA Training	
<b>FINANCE ANNUAL MANDATORY ROLE BASED TRAININGS</b>		
<input type="checkbox"/>	<b>SF2301</b> Petty Cash and Change Fund	<ul style="list-style-type: none"> <li>Petty cash custodians</li> <li>Change fund custodians</li> <li>Business administrators whose department has a petty cash fund</li> </ul>
<input type="checkbox"/>	<b>SF2302</b> Procurement Card Cardholder (see Note C)	<ul style="list-style-type: none"> <li>Employees who use P-Cards to make University purchases that are direct-billed to the department</li> </ul>
<input type="checkbox"/>	<b>SF2303</b> Procurement Card Business Office (see Note C)	<ul style="list-style-type: none"> <li>Employees who perform administrative tasks related to P-Cards, such as updating the bank's online system (GCMS) and preparing Expense Reports for signature</li> </ul>
<input type="checkbox"/>	<b>SF2304</b> Travel Card Cardholder	<ul style="list-style-type: none"> <li>Employees who use <u>Individual</u> Travel Cards to purchase airfare and/or make other University travel-related purchases that are direct-billed to the department</li> </ul>
<input type="checkbox"/>	<b>SF2306</b> Red Flag Rules	<ul style="list-style-type: none"> <li>Representative(s) from departments that have customer accounts for which they routinely (1) obtain or use consumer reports for a credit transaction, (2) furnish information to a consumer reporting agency for a credit transaction, or (3) advance funds to customers (i.e., provide loans). Everyone in the department is not required to take Red Flag Rules training. However, all department staff who have access to these accounts should receive in-house department training and updates on specific department procedures for preventing, detecting, and mitigating identity theft. See MAPP 01.03.04 for more information.</li> </ul>
<input type="checkbox"/>	<b>SF2307</b> Credit Card Processing (see Note B)	<ul style="list-style-type: none"> <li>Employees who process credit card transactions (i.e., receive, handle, or send credit card information) for departments that accept credit card payments</li> <li>Supervisors of the above employees</li> <li>Business administrators whose department accepts credit card payment</li> <li>Others who oversee credit card operations in a UH department</li> </ul>
<input type="checkbox"/>	<b>SF2308</b> Credit Card Accounting (see Note B)	<ul style="list-style-type: none"> <li>Employees who create journals to record credit card receipts for departments that accept credit card payments</li> <li>Supervisors of the above employees</li> <li>Business administrators whose department accepts credit card payment</li> <li>Others who oversee credit card operations in a UH department</li> </ul>
<input type="checkbox"/>	<b>SF2309</b> Credit Card Data Security (see Note B)	<ul style="list-style-type: none"> <li>Employees who have access to sensitive credit card information, such as the full account number received by their department for credit card transactions</li> <li>Supervisors of the above employees</li> <li>Business administrators whose department accepts credit card payment</li> <li>Others who oversee credit card operations in a UH department</li> </ul>
<input type="checkbox"/>	<b>SF2310</b> Cash Security Procedures (See Note A)	<ul style="list-style-type: none"> <li>Employees that handle cash (currency or checks)</li> <li>Petty cash custodians</li> <li>Change fund custodians</li> </ul>
<input type="checkbox"/>	<b>SF2311</b> Cash Deposit and Security Procedures (See Note A)	<ul style="list-style-type: none"> <li>Employees that handle cash (currency or checks) <b>and</b> process deposits in the Finance System</li> <li>Business administrators whose department handles cash</li> </ul>
<input type="checkbox"/>	<b>SF2312</b> Conflict of Interest and Procurement	<ul style="list-style-type: none"> <li>All Full time Faculty</li> <li>All Exempt Staff</li> <li>Non-exempt Staff with procurement responsibilities</li> </ul>
<input type="checkbox"/>	<b>HF2308</b> Asset Management: Business Managers	<ul style="list-style-type: none"> <li>Department Business Personnel</li> <li>Required biennially (even numbered years)</li> </ul>

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<input type="checkbox"/>	<b>HF2307</b> Asset Management: Property Custodians	<ul style="list-style-type: none"> <li>Designated Property Managers</li> </ul>
<b>FINANCE</b>		
<b>REQUIRED TRAININGS FOR SYSTEM ACCESS</b>		
<input type="checkbox"/>	<b>HF2301</b> Voucher Creation	<ul style="list-style-type: none"> <li>Employees who will be working with and/or processing vouchers</li> </ul>
<input type="checkbox"/>	<b>HF2302</b> Service Center Payment	<ul style="list-style-type: none"> <li>Employees working at a service center</li> </ul>
<input type="checkbox"/>	<b>HF2303</b> Purchase Req Training	<ul style="list-style-type: none"> <li>Employees who will be working with and/or processing purchasing requisitions</li> </ul>
<input type="checkbox"/>	<b>HF2305</b> Budget Entry Creation	<ul style="list-style-type: none"> <li>Employees who will be responsible for budget entry</li> </ul>
<b>HUMAN RESOURCES</b>		
<b>REQUIRED TRAININGS FOR SYSTEM ACCESS</b>		
<input type="checkbox"/>	<b>HH2301</b> HR View	<ul style="list-style-type: none"> <li>Employees needing access to PeopleSoft must complete the form and this course</li> </ul>
<input type="checkbox"/>	<b>HH2302</b> HR Query Viewer	<ul style="list-style-type: none"> <li>Required to run and view queries for HR PeopleSoft</li> </ul>
<input type="checkbox"/>	<b>HH2303</b> HR Query Manager	<ul style="list-style-type: none"> <li>Required to create queries for HR PeopleSoft</li> </ul>
<input type="checkbox"/>	<b>SH2302</b> TRAM Training	<ul style="list-style-type: none"> <li>Time Approvers TRAM Training</li> </ul>
<input type="checkbox"/>	<b>SH2304</b> Taleo Training	<ul style="list-style-type: none"> <li>Employees who will be creating postings and offers in Taleo. Training is required before access is granted</li> </ul>
<input type="checkbox"/>	<b>HH2308</b> Alternative Wrk Policy - Mgrs	<ul style="list-style-type: none"> <li>Employees with direct reports</li> <li>Required prior to requesting Alternative Work Arrangement</li> </ul>
<input type="checkbox"/>	<b>HH2309</b> Alternative Wrk Policy - Staff	<ul style="list-style-type: none"> <li>Employees requesting Alternative Work Arrangement</li> <li>Required prior to requesting Alternative Work Arrangement</li> </ul>
<b>OTHER</b>		
<input type="checkbox"/>	<b>HO2302</b> CMS Medicare Waste & Abuse	<ul style="list-style-type: none"> <li>Optometry</li> </ul>
<input type="checkbox"/>	<b>HO2303</b> CMS Medicare C D Compliance	<ul style="list-style-type: none"> <li>Optometry</li> </ul>
<input type="checkbox"/>	<b>HO2304</b> Golf Cart Training	<ul style="list-style-type: none"> <li>Anyone who operates a UH vehicle or cart</li> </ul>
<input type="checkbox"/>	<b>HO2305</b> Safety Awareness Training	<ul style="list-style-type: none"> <li>This course reviews safety awareness</li> </ul>
<input type="checkbox"/>	<b>HO2306</b> Bloodborne Pathogens	<ul style="list-style-type: none"> <li>This is a recertification course for those who have taken the classroom Bloodborne Pathogen training.</li> </ul>
<input type="checkbox"/>	<b>HU2301</b> Advance Database	<ul style="list-style-type: none"> <li>University Advancement database training</li> </ul>

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<input type="checkbox"/>	<b>HU2302</b> Gift Acceptance	<ul style="list-style-type: none"> <li>University Advancement Gift Acceptance training</li> </ul>
	<b>HU2306</b> Anonymous Gift Commitment Protocol	<ul style="list-style-type: none"> <li>University Advancement Anonymous Gift Acceptance Protocol</li> </ul>
<input type="checkbox"/>	<b>HO2307</b> SAXSIB: Managing Service Indicators	<ul style="list-style-type: none"> <li>Formerly SAXSIB</li> </ul>
<input type="checkbox"/>	<b>HO2308</b> SAXGRT: Graduation Tracking	<ul style="list-style-type: none"> <li>Formerly SAXGRT</li> </ul>
	<b>FH2301:</b> Phishing Awareness	<ul style="list-style-type: none"> <li>Facilities Personnel</li> </ul>
	<b>FH2302:</b> Essential Personnel	<ul style="list-style-type: none"> <li>Facilities Personnel</li> </ul>
<b>RESEARCH</b>		
<input type="checkbox"/>	<b>HR2301</b> RACP Module 1	<ul style="list-style-type: none"> <li>Research</li> </ul>
<input type="checkbox"/>	<b>HR2302</b> RACP Module 2	<ul style="list-style-type: none"> <li>Research</li> </ul>
<input type="checkbox"/>	<b>HR2303</b> RACP Module 3	<ul style="list-style-type: none"> <li>Research</li> </ul>
<input type="checkbox"/>	<b>HR2304</b> RACP Module 4	<ul style="list-style-type: none"> <li>Research</li> </ul>
<input type="checkbox"/>	<b>HR2305</b> RACP Module 5	<ul style="list-style-type: none"> <li>Research</li> </ul>
<input type="checkbox"/>	<b>HR2306</b> RACP Module 6	<ul style="list-style-type: none"> <li>Research</li> </ul>
<input type="checkbox"/>	<b>HR2307</b> RACP Module 7	<ul style="list-style-type: none"> <li>Research</li> </ul>
<input type="checkbox"/>	<b>HR2308</b> RACP Module 8	<ul style="list-style-type: none"> <li>Research</li> </ul>
<input type="checkbox"/>	<b>HR2309</b> RACP Module 9	<ul style="list-style-type: none"> <li>Research</li> </ul>
<b>UHD</b>		
<input checked="" type="checkbox"/>	<b>DF2301</b>	<ul style="list-style-type: none"> <li>UHD Cash Handling</li> </ul>
<input checked="" type="checkbox"/>	<b>DF2302</b>	<ul style="list-style-type: none"> <li>UHD Cardholder Recertification</li> </ul>
<input checked="" type="checkbox"/>	<b>DF2303</b>	<ul style="list-style-type: none"> <li>UHD Processor Recertification</li> </ul>

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<input checked="" type="checkbox"/>	<b>DF2304</b> • UHD Property Management
<input checked="" type="checkbox"/>	<b>DS2301</b> • UHD CSA Training
<b>UHV</b>	
<input checked="" type="checkbox"/>	<b>VF2301</b> • UHV Cash Handling
<input checked="" type="checkbox"/>	<b>VF2302</b> • UHV Pro Card
<input checked="" type="checkbox"/>	<b>VF2303</b> • UHV Purchasing
<input checked="" type="checkbox"/>	<b>VF2304</b> • UHV Property Management
<input checked="" type="checkbox"/>	<b>VH2301</b> • UHV Policy Review
<input checked="" type="checkbox"/>	<b>VS2301</b> • UHV CSA Training
<input checked="" type="checkbox"/>	<b>VH2305</b> • UHV Child Protection Training
<b>UHCL</b>	
<input checked="" type="checkbox"/>	<b>CF2302</b> • UHCL PCard
<input checked="" type="checkbox"/>	<b>CF2303</b> • UHCL Property Management
<input checked="" type="checkbox"/>	<b>CF2310</b> • UHCL Change Fund Cash Security
<input checked="" type="checkbox"/>	<b>CF2311</b> • UHCL Change Fund Cash & Deposit
<input checked="" type="checkbox"/>	<b>CS2301</b> • UHCL CSA Training
<input checked="" type="checkbox"/>	<b>CF2313</b> • UHCL Contract Creation
<input checked="" type="checkbox"/>	<b>CHR11</b> • TRAM for Managers – Part I
<input checked="" type="checkbox"/>	<b>CHR12</b> • TRAM for Managers - Part II

## FINANCE

Note A: Employees who are also involved in creating or approving cash deposit journals only need to take the Cash Deposit and Security Procedures training, since it includes information reviewed in the Cash Security Procedures training.

Note B: Credit Card Accounting, Credit Card Processing, and Credit Card Data Security are intended for departments that accept credit cards as a form of payment for goods or services they provide (e.g., auxiliaries, Bursar's Office, etc.). They are not intended for departments that only have P-Cards and/or Travel Cards.

Note C: P-Card cardholders who are also involved in updating the bank's online system (GCMS) only need to take the Procurement Card Business Office training, since it includes information reviewed in Procurement Card Cardholder training.

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Note D: As of FY23, CF2313 UHCL Contract Creation is mandatory for all UHCL employees and is part of the annual mandatory training list.

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## ENROLLMENT

- Log onto P.A.S.S.
- Click "Training"
- Click "Request Training Enrollment."
- Select "Search by Course Number" or "Search by Course Name"
- Enter the course number or a portion of the course name in the appropriate field and click "Search." The course (or list of courses) will appear.
- Click "View Available Sessions" of the course you are interested in.
- Click the session link of the course
  - All online courses have the same date: the last day of the fiscal year. You will be able to access the courses the day after you register up until the date listed.
- The "Session Detail" page appears. Review the information.
- To be added to the class, click "Continue."
- The "Submit Request" page appears. Review the Information. Click "Submit."
- Select OK when the "Save Confirmation" page appears.
- The "Confirmation" page appears. Review the information.
- You will be able to access the course the next day in TAP. (See accessing courses below)

## ENROLLMENT TROUBLESHOOTING

- A notification may pop up that you are registered for a course on the same date.
  - This is just a notification that you are enrolled in another course on the same date. Click ok to the message and continue with your registration. All online courses have the same date- the last day of the fiscal year. Once you register via PASS, you will be able to access the course in TAP 24 hours after you register up until that date.
- If a session does not appear:
  - You may already be enrolled. Online courses only allow employees to enroll once, since they are accessible until the end of the fiscal year. If there are not any sessions to select, you may be already registered. You are able to access the training via TAP (see below) 24 hours after you register in PASS.

## ACCESSING COURSES

- UH Central Employees can access the site via [AccessUH](#) by clicking on TAP Employee Online Training
  - Log into AccessUH using your Cougnet ID and password
- Log in directly by visiting: <http://login.tap.uh.edu>
  - Log into TAP with your PeopleSoft ID and PeopleSoft Password

***For more information regarding online courses or access, please visit the HR Website:***  
<http://www.uh.edu/human-resources/talent-development/>