



Harris County Auditor's Office Newsletter



Michael Post, CPA
County Auditor

July 2020



Auditor's Office

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The Impact of STARS on the Supplier Payment Process

With the rollout of the STARS PeopleSoft system March 1, 2020, there are two different methods for the payment of goods and services sold to Harris County. The following explains at a high level how each of these processes work in the new STARS environment.



Reginald Yancey, CPA
Director
Accounts Payable

STARS vs. IFAS...A Historical Perspective

Historically, the payment for the purchase of goods and services provided to Harris County was paid for in one of two ways; Purchase Orders or Request for Payments (RFP). In both cases, invoices or RFPs were sent to the Auditor's Office Accounts Payable Department (AP) and entered into IFAS for payment. Purchase order invoices were subsequently routed to respective departments for their final approval. Although there was no formal receiving process in IFAS, the department's final approval served as their "de facto" acknowledgment of receipt. Since RFPs were wet signed by department heads, AP entered them directly into IFAS and posted them for payment. This had been the practice for the past twenty years, but effective March 1, 2020, that all changed.

With the implementation of STARS,

RFPs were eliminated and replaced with Payment Requests. Unlike RFPs, Payment Requests are entered directly into STARS by departments, their supporting documentation is attached, and the request is then routed via a workflow for department approval before being sent to AP. Once in AP, the information is reviewed for accuracy and proper support. If all

INSIDE THIS ISSUE:

- **The Impact of STARS on the Supplier Payment Process**
- **Changes to STARS Supplier Set-Up**
- **Update from the Auditor's Office Payroll Department**
- **Continuous Audit Advancements in STARS**
- **Making the Most of Your STARS Training Resources**
- **The County Auditor's Fraud, Waste or Abuse Program**
- **Grants: Common Errors with STARS PeopleSoft**
- **The Collections Workbench**
- **New STARS SWAT Team**
- **Employee Service Anniversaries**

is in order, a voucher is created, the budget is checked, and a payment is made. See the list at the end of this article for items that are allowed to be paid using a STARS Payment Request.

Receiving/Three & Four Way Matching

Another major change that took effect March 1, 2020, was the requirement that departments begin explicitly receiving goods and services purchased on a PO prior to the suppliers getting paid. This facilitates the three way (invoice, PO, & receipt) and sometimes four way match (invoice, PO, receipt, and inspection). Receiving can be by quantity or amount, depending on how the PO is created. Departments are encouraged to receive only the amount or quantity that was physically received. Receivers have the ability to enter comments, invoice information, and packing slip information when they receive. Making this information available helps AP personnel when manually matching invoices to receipts and processing payments to suppliers. Only one receipt should be created per invoice. Detailed training regarding how to receive will be provided during the coming months.

One requirement that has not changed is the need for supplier invoices to contain the key information needed to help facilitate payment. For a comprehensive listing of these requirements, visit <https://auditor.harriscountytexas.gov/Pages/APIInvoiceRequirements.aspx>.

Supplier Set-up

The process for setting up suppliers has also been modified and now involves two teams. Vendor Management (Purchasing) and Vendor Verification (Auditor's Office). This structure ensures the separation of duties and guards against potential malfeasance.

All new supplier and existing supplier change request forms are submitted to the Vendor Management Team (VMT) and are assigned to a team member within 24 hours of receipt. Once entered into the STARS system, the supplier package is routed through the VMT for approval. Upon full approval by the VMT, the supplier package is routed to the Vendor Verification Team (VVT) in the Auditor's Office for their review. This review consists of:

- Review package for completeness
- Completion of the TIN/SSN verification process with the IRS
- Confirmation of the validity of the supplier information by independent research (Texas Secretary of State, Bloomberg, White Pages, Dun and Bradstreet, etc.)
- Verbal confirmation of critical data (banking information, address, email, etc.) with supplier

Upon completion of their review, VVT approves or denies the creation/modification of the supplier. It must be noted that changes made to an existing supplier places that supplier in an "unapproved" status until the supplier has been fully approved again by VVT. During the period the supplier is in the "unapproved" status, requisitions cannot be entered by departments, purchase orders cannot be established in Purchasing, and any payments that are pending in AP are systematically put on hold by the STARS system until the supplier is made active again.

Invoice, Receipt, Capture, and Distribution for Payment

Invoices are received in AP via US Mail, Interoffice mail, and PDF copies emailed to the vendorinvoices@hctx.net mail box. Once received, images are centrally scanned into folders on a shared drive by department number. AP processors select from these folders the various images that are saved, and input them into the STARS system. As each invoice is entered and attached in STARS, the image is moved from the pending entry folder to a folder labeled "Processed". The Auditor's Office strives to enter all invoices into STARS within seventy two hours of receipt. It should be emphasized again the importance of requiring suppliers to make sure each invoice submitted has a valid PO number and a clear indication of the county department receiving the goods or services.

List of Non-Purchase Order Expenditures

There are specific types of expenditures where the use of a purchase order is not required. For these expenditures, other types of documents should be used in order to authorize the disbursement of Harris County funds. Listed below are the acceptable documents that may be used to make certain types of purchases or authorize the disbursement of County funds.

1. Utility invoices must be expediently paid in order to avoid a disruption in services. Therefore, utility bills are processed using the utility company's billing statement. Reports are available to the user department to review the amount of funds expended and services provided.
2. Payment Requests (formerly known as Request for Payments Form 1268), are now entered directly into STARS by department personnel. Form 1268 is no longer required, however departments may want to use this form for internal tracking purposes when submitting expenditures. Supporting documentation is required to be attached to the request in order to pay the following types of claims:

Seminar fees	Professional membership fees and dues
Publications and subscriptions	Postage
Tort claims, court settlements	Refunds (lost books, park facilities, licenses, fees and tax deposits, etc.)
Taxes	Bank charges and fees
Book loan fees	Booth rentals
Courier and shipping charges	Juror Meals
Land and right of way purchases	Inter-local agreements (funding agreements for county partnerships in joint projects)
Flood Control-relocation expenses	Transfer of forfeited assets
Travel expenses	Visiting judge expenses
Grant/rents	Grant/client reimbursements
Grant/living allowances	Grant/mortgages
Grant/stipends	Gift Cards
Certain procurement card purchases, as allowed by the rules and procedures prescribed for the use of County purchasing cards as adopted by the County Purchasing Agent under L.G.C. 262.011 (o)	

3. A Department Imprest Account - Funding/Reimbursement Request & Reconciliation Form 1267 and supporting documentation are required to obtain reimbursement for authorized petty cash fund expenditures. (County Auditor's Petty cash procedures D.3). Once entered into STARS, the form along with all supporting documentation is attached and routed to Accounts Payable.
4. Travel Expenses formerly submitted on Claim Form 1263 are now entered by employees via the STARS Expense Module, with supporting documentation attached. Although Form 1263 is no longer required, some departments are continuing to use this form for internal purposes when tracking and submitting expenditures. Out of county travel that has been authorized by Commissioner's Court is submitted in this manner.
5. Automobile expenditures formerly submitted on the Automobile Expense Claim Form 1241 are entered by employees via the STARS Expense Module. Supporting documentation is required to obtain reimbursement for in-county travel and related parking expenses. Although Form 1241 is not required, departments may use the form for internal recording purposes.

6. Court Services - Court Appointed Attorney Fees and related expenses, Substitute Court Reporters, Statement of Facts, Expert Witness Fees, Guardianship and Ad Litem expenses must be submitted on specific forms prescribed by the Auditor's Office.
7. Payments to outside entities not involving the purchase of goods and services which have been appropriated in Harris County's budget must be supported by invoices and an executed contract/agreement setting forth payment dates, and other appropriate information. For example, payments to the following entities fall into this category:
 - The Harris Center for Mental Health and IDD
 - Harris County Appraisal District (HCAD)
 - Economic Development Agreements
 - Greater Houston Convention Bureau Agreement
 - Cultural Arts Council

Emergency expenditures will be handled in accordance with current purchasing rules and procedures.

Changes to STARS Supplier Set-up

With the implementation of STARS, the process for vendor set-up and approval has changed. The first major change is the terminology – Vendors are now called Suppliers in STARS! In addition, the primary function of entering supplier information has moved from the Auditor's Office's Vendor Verification Team (VVT) to the Purchasing Department's Vendor Management Team (VMT).



Jolanda Smith, CGFM
Director
Revenue Accounting &
Financial Controls

Purchasing's VMT consists of the Supplier Creation Team and the Purchasing Approval Team. Departments should submit all required documentation to set up a supplier to the Purchasing VMT. The Supplier Creation Team will review the information, notify the department of any issues and enter the information into STARS. Once entered, the supplier is routed via workflow to the Purchasing Approval Team. The Purchasing Approval Team reviews the information and if everything is in order, approves the supplier. If errors are discovered, the supplier is denied and sent back to the Supplier Creation Team for corrections.

After approval by the Purchasing Approval Team, STARS workflow routes the supplier to the Auditor's Office's VVT. The VVT verifies pertinent information for new and existing suppliers and performs independent research utilizing various sources. Depending on the specifics of each submission, verbal verification with the supplier may also be required. If errors are found or appropriate verification cannot be obtained, the supplier is denied and sent back to the Purchasing VMT for corrections.

Once corrections are made and suppliers are verified, the VVT performs the final approval of the supplier. Generally, the process from submission to final approval should take two to four days. This timeframe, however, is completely dependent on the accuracy of the information submitted, the ability to verify the information, and the volume of suppliers in the pipeline.

One additional significant change is that when requests for changes to suppliers are being processed, the supplier is changed in STARS from "Approved" to "Unapproved." When a supplier is in an "Unapproved" status, STARS will not allow any transactions – requisitions, purchase orders, voucher approval, payments – to be processed until VVT reapproves the supplier. Because many suppliers are used by multiple departments, it may be a surprise to learn that a supplier with an "Approved" status yesterday is now "Unapproved" today. If you encounter this situation, please reach out to the Purchasing Department's VMT. They will be able to provide the STARS status of any supplier at any given time and help discern where any bottleneck may be.

Update from the Auditor's Office Payroll Department

As you are aware, the County implemented STARS in March of this year. As of the end of June 2020, 11 payrolls had been processed within the new system (9 of which were processed after the Work Safe, Stay Home Order) with approximately 98% accuracy. This is a direct reflection of the hard work and dedication of the Auditor's Office Payroll Department and Universal Services teams.



Nancy Cook
Assistant Director
Payroll

Since implementation, the STARS payroll system has experienced the following:

- Pre-population of timesheets for several departments has resulted in more timely posting and processing of time.
- Reduction in the volume of special check requests each pay period reflects a better understanding by departments of time and labor functions.
- Increased efficiency in payroll processing has allowed the Payroll Department to return to processing payrolls on Mondays of pay weeks, as in the legacy IFAS system.

Looking ahead, the STARS Project Team will kick off the Time Entry Project. This project will allow employees to take ownership of their own timesheet and submit electronically through STARS for approval. The slated implementation is Fall 2020. More information to come!

Continuous Audit Advancements in STARS

During the transition from IFAS to STARS the Auditor's Office Information Systems Audit team developed a list of scenarios as potential continuous audit routines for various business activities. Following are a few selected Accounts Payable examples:

- Review usage of inactive vendors or vendors that haven't been paid for a long period of time. (Zombie vendors)
- Monitor vendor master data for missing items that are either required or considered critical (e.g., Taxpayer identification number)
- Identify vendors that may already exist but under a slightly different name (Duplicate vendors)
- Test multiple data points to identify vendors that may be connected to each other or to employees or contractors (Conflicts of interest)
- Identify multiple changes to vendor master data within a short time period (e.g., a bank account change quickly changing back again)



Patrick Rodriguez,
CIA, CFE, CISA
Director
Information Systems
Audit

To facilitate monitoring of these and other activities, Information Systems Audit acquired a technology application, Alessa. Alessa allows analysis routines developed by Information Systems Audit to be packaged, scheduled, and a workflow developed to route items of interest for further review.

Information Systems Audit appreciates any ideas or scenarios from departments that potentially can add value to their operations. Please contact the team at Patrick.Rodriguez@aud.hctx.net or 713-274-5686.

Making the Most of Your STARS Training Resources

Did you know there are over 240 STARS role based training resources online and available to employees while logged in to the system? Training resources are documented on live workspaces like the STARS Website, and within the STARS PeopleSoft application itself. Several are considered "favorites" as they are among the most requested information. In addition, there's a video to assist County employees with learning how to utilize STARS.



**Merle Ray, SPHR,
IPMA-SCP, CCP**
ERP Support
Specialist

You can find this video and other great training materials on the Training page of the STARS Website. The materials are organized by STARS Modules. For example, if you are looking for hiring information, click the Human Resources link under the HR & Payroll section.

Each link on the STARS website includes the following type of materials for each topic:

- **Job Aid/Quick Reference Guides** which provide step by step written instructions;
- **PowerPoints** which can be used for Train the Trainer sessions and/or review of face to face training materials;
- **Videos** which provide the ability for you to see the action performed in STARS;
- **Simulations** called User Productivity Kits (UPKs) provide hands-on examples which allow a user to perform STARS actions in a safe training environment

If resources are not available for a specific module/topic, employees can make requests for training tools using the communication links provided on the STARS Webpage. The STARS ERP Communications team welcomes all questions and suggestions.

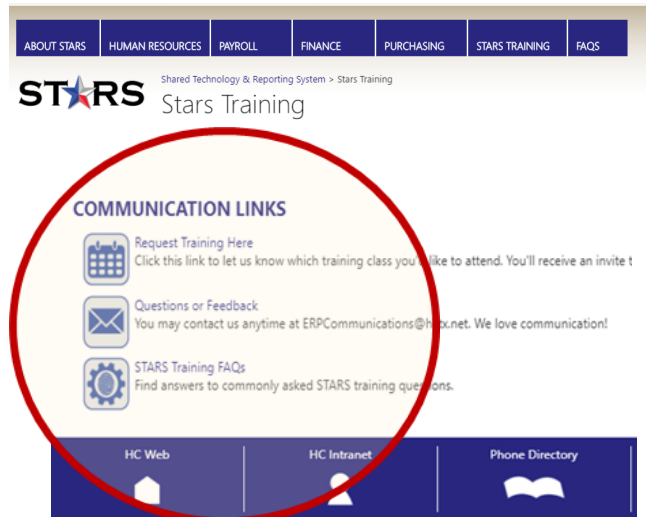
There are several ways to get in touch and keep in touch with STARS! Simply remember these three key points:

1 **Know how to get in.**
<https://stars.webhc.hctx.net/SitePages/Home.aspx> from within Harris County network

3 **Stay in touch through Communication channels.**

User ID = Employee ID
Contact your Department HR Representative for initial password information

2 **Know where to access Help.** Click on STARS Training tab to view video on where to access Help with STARS



Hands-on Practical Favorites

As mentioned, **Job Aids** and **Quick Reference Guides** provide step by step written instructions. Job aids range from those that assist in performing the simplest of tasks as well as those that detail the steps to perform complex tasks. Job aids, like all of the other reference materials, are organized according to module. From the STARS training website, users can choose the category or module they are looking for, and select from the list of resources, including job aids, PowerPoints, videos, and more.

Some of the most requested STARS information from departments has been turned into hands-on practical quick reference guides or job aids including:

STARS Password Expiring or Forgot Your Password (*on the STARS Training Page*)


Project Costing – FAQs on Creating Projects in STARS (*under Accounting, Finance, & Grants*)



How to change your Password – QUICK REFERENCE GUIDE on the STARS Home Page

Forgot Your Password?

If you forgot your password, simply click the Forgot your password screen and follow the onscreen instructions. You will receive the STARS HR and Payroll site and log in using the temporary change your password.



Changing Your Password

Follow the steps below from within the [STARS HR and Payroll](#) your password, the new password will apply to the STARS HR Procurement site.



Project Costing Info – JOB AID on the Projects & Grants list found under Accounting, Finance, & Grants

Project Costing **STARS**
Shared Technology & Reporting System

FAQs on CREATING PROJECTS IN STARS - JOB AID

The following are some frequently asked questions on creating and managing projects in STARS. The responses are from the Harris County Project Team. Be sure to review the latest information under the Finance and Procurement on the [STARS Training](#) page.

Setup Questions

Q: Can the Project ID or Activity ID be changed?
A: No, they cannot be changed once established. If you need a different ID a new project and/or activity must be created, and the old ID must be made inactive. Only the Auditor's office can make a project inactive. However, departments can make any of their activities in their project inactive.
 Go to the Details tab on the Project Activities page and change the Processing Status to "Inactive" in the drop down box. Save the project. The activity is no longer usable on transactions.

Project ID	Activity Name	Activity Type	Project Status	Activity Status	Open	Active	Inactive
11	Transfer to Debt Serv	SL	IS	IS	Open	Active	Inactive
11	Transfer to Debt Serv	SL	IS	IS	Open	Active	Inactive

Q: How do I close a project?
A: An email must be sent to the Auditor's office requesting that the project be closed. Once it has been verified that there is no remaining budget on the project, they will change the status to "Closed". The project will no longer be available to use. Projects can always be re-opened.


Q: I used a grant fund on a transaction, but it is not appearing on the items to bill the grantor.
A: Most likely the project was not set up as a grant project and attached to a grant contract. Check with your Grant Accountant in the Auditor's Office for assistance.

Q: Why is my project not open yet?
A: Most likely all of the required steps have not been completed and the project is therefore not yet in the Auditor's queue to complete the setup.
 Here are two useful tools in the [PROJECTS FOR USERS GUIDE](#). Review the **Project Setup Steps Checklist** found on page 7. See Section 15 on the Monitor Project Setup Status. This discusses using the STARS query

All departments and employees can benefit from the tools and resources offered for STARS by increasing awareness, expanding knowledge and exercising their ability to perform the required actions in STARS. By continuously keeping abreast of what's available in the system, users can reinforce and sustain the changes resulting from the implementation.

Remember to keep enjoying these hot topics by referring to the helpful resources found on the STARS Training Website! Be sure to bookmark <https://stars.webhc.hctx.net/SitePages/Home.aspx> in your County network browser window.

ABOUT STARS
HUMAN RESOURCES
PAYROLL
FINANCE
PURCHASING
STARS TRAINING
FAQS


Shared Technology & Reporting System > Stars Training

Stars Training

The County Auditor's Fraud, Waste or Abuse Program

Harris County (the County) is committed to ensuring transparency, accountability, and integrity in all of its activities. This requires lawful and ethical behavior from County officials, employees, and affiliated parties through compliance with the Harris County Code of Conduct. The County Auditor's Fraud Waste or Abuse (FWA) Program and the Harris County Code of Conduct defines misconduct that would be reportable as fraud, waste or abuse and what actions will be taken when these types of allegations are reported.



Errika Perkins,
CPA, CIA, CFE
Chief Assistant
Audit Division

The County has contracted with EthicsPoint, a third-party vendor that provides a comprehensive and confidential reporting tool to assist the County in addressing fraud, waste or abuse. Through EthicsPoint, the County has a confidential hotline and website that allows employees, vendors, grant applicants, and the general public to anonymously report allegations of fraud, waste, or abuse of County funds (including all federal, state, and local sources), resources, and projects. All reports made to the hotline are investigated by the Compliance Department's Investigation Team within the County Auditor's Audit Division in conjunction with the County Attorney's Office. All reports received are kept confidential to the extent provided by law.

Although the County's FWA Hotline is intended for fraud, waste or abuse, we do sometimes receive employee abuse or personnel policy violation allegations which we transfer to the County's Human Resources and Risk Management Department (HRRM) for investigation.

**Reporting is easy, safe and secure.
Here are two ways to report:**

Phone: 866-556-8181

Internet: harriscounty.ethicspoint.com

Examples of items that should be reported to the hotline include, but are not limited to:

- **Fraud** – includes wrongful or criminal deception intended to result in financial or other personal gain, such as:
 - Falsifying information on grant applications, billings, test results, reports, etc.
 - Forgery or alteration of documents such as invoices, checks, contracts, etc.
 - Using government funds to purchase items that are not for County business use
 - Misappropriation of funds, equipment, supplies, or County assets
 - Soliciting or accepting gifts from outside sources
 - Illegal bribes or vendor kickbacks
- **Waste** – includes the extravagant, careless, or needless expenditure of government funds, or the consumption of County property that results from deficient practices, systems, controls, or decisions.
- **Abuse** – includes the excessive or improper use of assets or information to unfairly gain benefit, such as:
 - Intentional destruction of County equipment
 - Inappropriate use of County-provided computers or email
 - Abuse of power for illegitimate personal gain

Harris County FWA Hotline Frequently Asked Questions

Question: Are the reports of fraud, waste or abuse confidential?

Answer: Information identified, researched, or obtained for or as part of a suspected FWA investigation is considered confidential. Any information used and/or developed by participants in the investigation is maintained solely for this specific purpose and no other. The County assures the anonymity of complaints to the extent permitted by law.

Question: Will department heads be notified of all allegations related to their departments?

Answer: All allegations received are investigated. As appropriate, departments may be made aware of allegations and may be asked to assist with investigations.

Question: Does the County have Whistle Blower protections?

Answer: Yes, per the Harris County Code of Conduct Policy, "Harris County will not discharge, demote, or otherwise discriminate against an official or employee who makes a good faith report of a violation of this Code of Conduct."

Question: Will the County Auditor's Office provide a report of the results of the investigation?

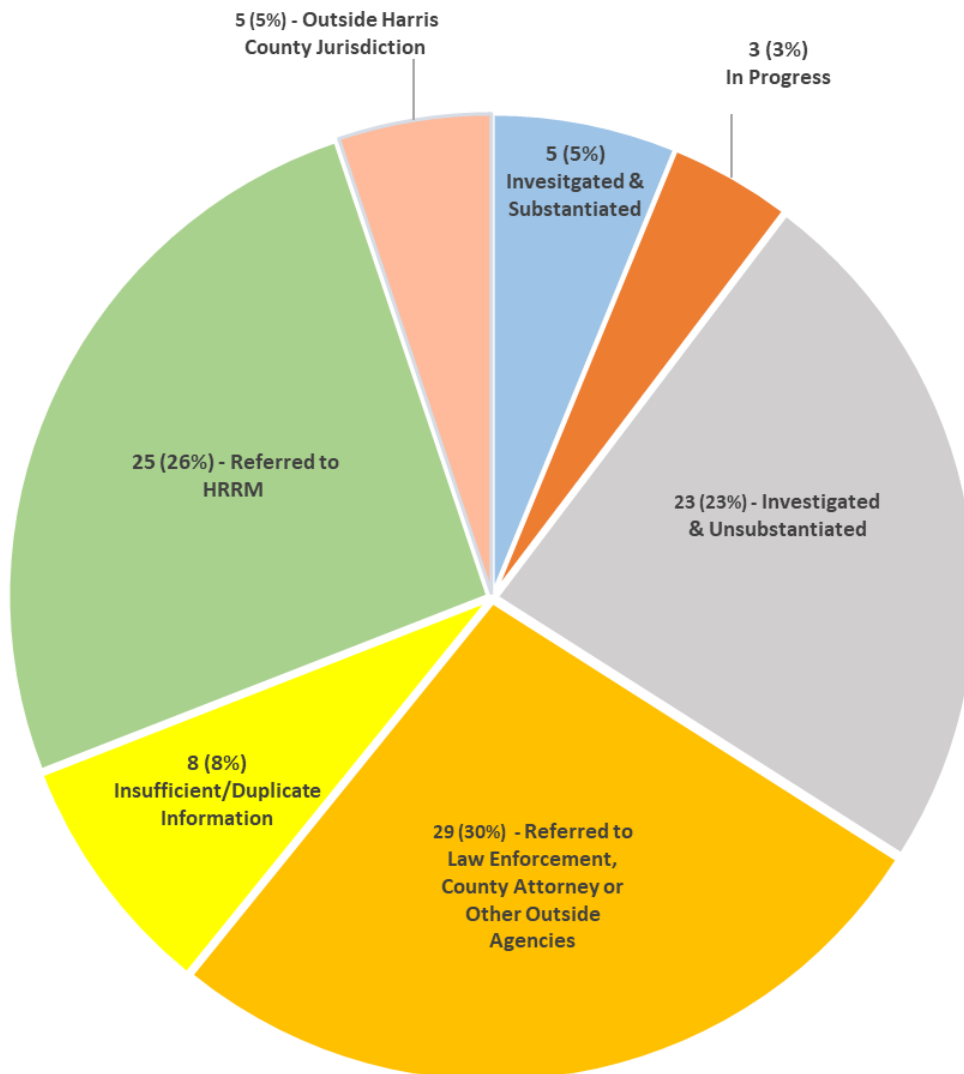
Answer: No, however the County Auditor investigates all allegations.

Question: How will allegations be tracked?

Answer: Allegation outcomes are tracked as (1) insufficient information, (2) substantiated, (3) unsubstantiated, or (4) referred. A summary of allegations is provided at the Auditor's Office quarterly Audit Review Committee meetings.

Summary of FWA Case Results

As of July 20, 2020, a total of 98 allegations have been received through the Fraud, Waste or Abuse Hotline. Below is a summary of the case resolutions:



Grants: Common Errors with STARS PeopleSoft

With the implementation of PeopleSoft on March 1, 2020, grants has been one of the most significantly impacted areas. Prior to PeopleSoft, grant transactions were recorded in separate stand-alone funds. In PeopleSoft, grant transactions are recorded in unique projects within the PeopleSoft Project Costing Module. During the initial four months of using PeopleSoft, there has been some trial and error along the way. Following is a list of some of the common errors that have arisen and tips to prevent them from reoccurring:



Paul Wilden, MBA
Manager
Grants Accounting

Incorrect fund used for grant projects

There have been several cases where grant projects have been used with General Fund 1000. A grant project should only be used with the six established grant funds which begin with a 26:

- 2601 = Federal Grant
- 2602 = State Grant
- 2603 = Local Grant
- 2604 = Other
- 2688 = Program Income
- 2699 = Matching Funds

Grant cash match expense charged to the incorrect grant fund

Previously in IFAS, matches or cost shares were tracked in object codes ending in XX, ZZ or YY within the same org-key. In PeopleSoft, cash matches are now tracked in fund 2699 with accounts ending with 97, 98 or 99. Using the incorrect fund on a transaction can result in a budget block.

Incorrect project used

Incorrect project numbers are being used either because the user does not know which project to use or because there is a typo in a payroll or accounts payable transaction. This results in the need for a correcting journal entry.

Departments should contact the respective grant accountant if they are unsure of which project to use.

Missing chart field strings

There have been numerous cases in which payroll transactions, journal entries, and accounts payable transactions have been coded to grant projects with either an incorrect or missing chart field string. When a grant fund is used, which must begin with 26, chart field strings such as Project Cost Business Unit, project and activity are required in addition to the fund, department and account.

Grant budget loaded by budget journal entry instead of utilizing the Grant Module

There have been numerous cases where departments have sent budget requests to be loaded through a budget journal entry. These have created budget variances between project level and department level budgets. All grant related budgets should be loaded from the grant module and not by a budget journal entry.

In any new ERP implementation there will be errors or "growing pains" as we all become familiar with the new system and develop new reports, processes and procedures. If you have questions related to the Grants Project Costing Module please contact Tom Ngo, Grants Subject Matter Expert Tom.Ngo@aud.hctx.net or Paul Wilden, Grants Accounting Manager, Paul.Wilden@aud.hctx.net.

The Collections Workbench

The Receivables Collections Workbench in PeopleSoft is a central workspace that presents a complete view of each customer and is also a great resource for information. Collectors can perform their day-to-day activities, including accessing and completing action items directly from the Collections Workbench, and Department personnel can also access it to view outstanding invoices, deposit information, statements, invoice copies, and view specific collection or dispute status with a customer.



Ron Foster, CPA, MBA
Manager
Accounts Receivable

The Collections Workbench page can be used to closely track and manage customer data from the day the customer receives a statement until

it is paid. You can find the Collections Workbench by going to [Main Menu > Accounts Receivable > Collections Workbench](#).

Users must first determine which Set ID to use. The most common ones used and ones that also have an associated Business Unit (BU) are:

HCNTY (HARRIS COUNTY)
 FCNTL (FLOOD CONTROL)
 HCMBI (HARRIS COUNTY BENEFITS)
 CSUPR (COMMUNITY SUPERVISION)
 JVBRD (JUVENILE BOARD)

Users then select a customer by entering or searching for a customer ID. If unknown, simply click on the magnifying glass next to Customer, which provides an Advanced Lookup option where users can search by all or part of the customer's name. Click the drop down arrow next to "Name 1" and choose from several search options. Selecting "contains" and then typing the customers often yields the best result. After the customer number is found, click "search" in the gray box.

Other more specific search options include Contract, Contract Line, Contract Type, Billing Specialist, Billing Authority and Reference Award Number. A contract line can only be used if you pre-select a Contract number.

In the Collections Workbench header, searches can be by values for contracts only, or by both customers and contracts. If you search data by contract, a value must be included in at least one of these fields; Contract, Billing Specialist, Billing Authority, or Reference Award Number.

Users can click on the Personalize Content link to access the Personalize Content page, where tabs can be personalized as well as the sections a user can see on the Collections Workbench. After a customer is selected, there are many options. The following tabs are available to review customer related information:

Payments tab provides all payments received for a customer. There is also a More Info column where users can drill down to see additional information related to a payment including date processed, the invoice the payment was applied against, check number and amount.

Items tab lists all invoice items associated with the customer, determined by filtering applied by the user. For instance, Open will show all customer open items outstanding while Closed will show all items related to the customer that have been closed. Other common filters include disputed, doubtful, and past due. If there are a large number items available that meet the desired criteria, users may scroll

through or click view all. Users can also click on the blue hyperlink of each item to see details for that item such as date processed, due date and contact information of who the responsible accounts receivable person is and address information for the customer. There are also various Detail sub-tabs where one can drill down to find if an item is associated with a contract and further drill down to see a copy of the invoice. Another useful option is to email a copy of the invoice to anyone with a couple clicks.

Aging tab provides an onscreen aging view of all outstanding items and the **Contracts** tab provides a listing of all associated contracts for the Customer. The current Aged Date appears and is updated by clicking the Update Aging button, along with the aging amounts in the Customer Aging grid.

Use the **Update Contracts** page to view a list of all contacts with the contact information for the selected customer.

Use the **Maintain Contacts** page to modify information about the selected contact. Users can also access the customer information for a contact, the contact's phone and type, the contact's user profile, and any applicable staffing information regarding this contact.

The **Correspondence** tab enables users to search and access statement and dunning collection letter details for the selected customer. Users can drill down to details, view an online image of a statement, and send a statement by email from this page. This functionality is only available to Accounts Receivable, but users can view the Correspondence from here.

In the **Statement History** group box, you can use the Statement Number field to search and display a specific statement and the Statement Date field to search and display any statements created on the selected date.

Use the **Send Statement** button/page to send the statement as an attachment by email through the Collections Workbench. The email address of the primary contact of the customer appears by default in the "To" field. The user's email address appears by default in the "BCC" (blind copy) field. Users can change information in the Email fields depending on business processes and record keeping. Views are by inquiry only.

Use the **Contracts** tab to view balance and past due amounts by contract or contract lines.

Use the **Filter Contracts** page to add more filters to select for specific contract data in the Contracts grid.

New STARS SWAT Team — Knowledge, Tools, and Resources

Long before STARS went live in March 2020, the Auditor's Office began working with project management partners in Universal Services, Budget Management, Purchasing and Treasury to fully implement the new Enterprise Resource Planning (ERP) system. This article discusses some of the training strategies and behind the scenes deployment of our new Project Management SWAT Team since Go Live implementation of STARS. It also examines some of the most recent county-wide feedback and activities on training, and promotes awareness of what's happening in STARS, so everyone can tap in and get connected to some of the efforts and resources for employees working within STARS.



**Merle Ray, SPHR,
IPMA-SCP, CCP**
ERP Support
Specialist

Formulation of Project Management SWAT Team

Now that Harris County departments have had some experience in using the STARS modules, the project partners formed a "SWAT" team to further support Harris County stakeholders and departments in ensuring a successful STARS post-implementation experience. No war boots, fatigue uniforms, battle machinery, or threats to life or limb here, the STARS Project Management SWAT team is an industry best practice technique increasingly used as a formal process to respond to mission-critical projects and situations. The focus of our STARS Project Management SWAT team is on resolving and minimizing project or business risks using powerful "knowledge, tools, and systems" that support departments and more fully enable staff inside the County to accomplish their daily tactical and strategic long-term mission. As a special purpose team created to respond, resolve, and minimize business-critical STARS difficulties or challenges, one of the initial post-implementation focuses for the SWAT Team has been continued training for users on the STARS PeopleSoft system. Following is a look at some of the work being done by your Harris County lineup of SWAT members and some of the crucial behind-the-scenes actions they and their departments have been working on to support your experiences in STARS.

Team members include both the Audit and Accounting Divisions of the Auditor's Office, Purchasing Department, Treasurer's Office, Universal Services, and members of CherryRoad Technologies, the County's ERP consultant.

Virtual STARS Post-Implementation Training

Training a lineup of over 80 departments across County government structure is not an easy task. Add to that the emergence of a global pandemic threatening the health, wellness, and life of over 17,000 employees in the third largest county in the United States, and you have a major significant public business challenge. To respond to this challenge, the Project Management SWAT team has deployed a full range of post-implementation virtual training sessions reaching departments across and throughout the County.

Procure to Pay Training and Live Session Q&A

Taught by subject matter experts, July 2020 saw post-implementation of the Procure to Pay Training and Live Session Q&A. These sessions were of high interest to every department throughout the County. ERP Communications reported that it understands additional training is necessary to help address questions and issues that have arisen regarding the end-to-end processes from procurement to payment. In response to these needs, STARS Procure to Pay online facilitated training sessions began in July for Harris County departments. These half day sessions covered the overall process flow including walking attendees through the process of Entering Requisitions, Receiving, Invoicing, all the way through to Payments. Because these were online sessions, the number of participants from each department was not limited. Participants from departments were grouped together where possible to attend the same session which gave workgroups the opportunity to hear the same information, questions, and answers at the same time to hopefully improve understanding.

Surveys were deployed after the training sessions to gather continuous feedback regarding training and reinforcement. It is important to note that training for STARS didn't just begin in July 2020. The ERP Project Management and Organizational Change team began working together to provide awareness, knowledge, and information to lay the groundwork for STARS as early as 2016. Groups of subject matter experts, management, and County Officials have continued in the endeavor to replace the County's legacy IFAS system with the Oracle PeopleSoft system, branded as STARS.

Now that departments have had at least 90 days of STARS utilization, a lot of useful feedback has been received on the system.

Several surveys have been conducted on business issues including a survey related to Accounts Payable:

Data Points from Harris County Departments Accounts Payable Survey

- The majority of respondents were hopeful and indicated that additional training efforts would help them to get over the learning curve, with 86% advocating for more training videos, 87% wanting additional job aids for reference, and 90% feeling they would benefit from interactive Q&A sessions.
- The need for additional training was the most cited issue in the comments to the survey.
- 82 comments were received on the open ended questions "What additional resources can be provided for the vendor payment process?" and "Please share any additional thoughts or concerns you may have." See chart below.

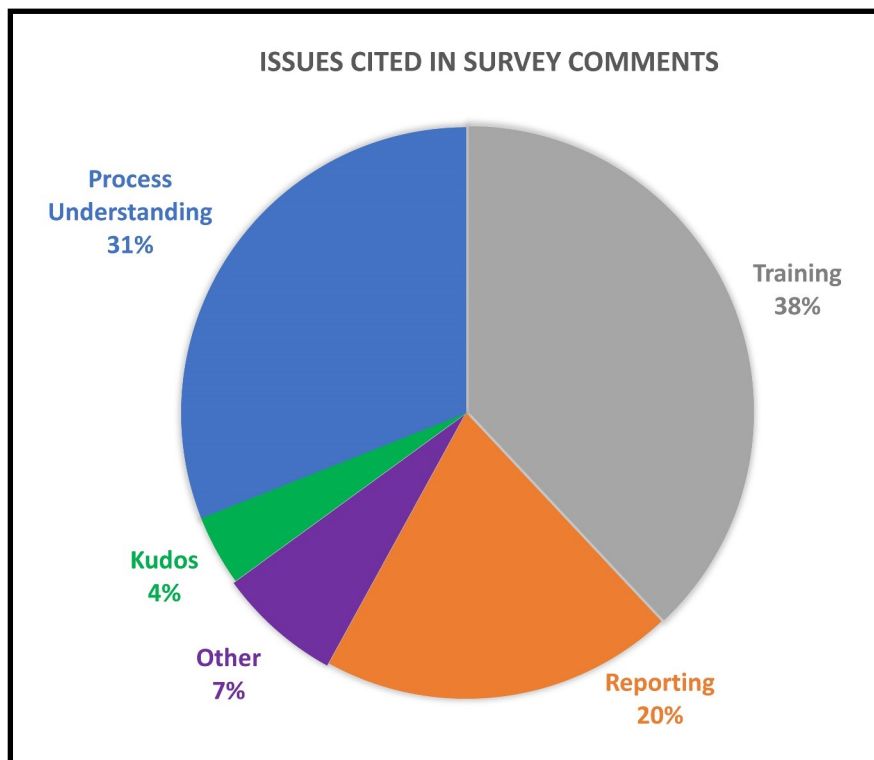
Armed with this information, the SWAT Team worked to build a strategy for post implementation STARS training available to the 80+ Harris County Departments. Information, results, and

feedback from the county-wide post-implementation training efforts will be available in the future.

Time Entry Refreshers

As of July 2020, time entry is still entered in STARS by time entry staff from each department. In-person classes were held for these employees in 2019 and early 2020 prior to go-live. Since Go-Live in March 2020, the Universal Services Training Team has been hard at work assisting and engaging departments informally on their daily needs by answering questions, creating new training resources, and building an online training plan for continuous learning opportunities. Pilot sessions for time entry began in June 2020 and sessions open to all departments began in July 2020. There will be a Time Entry Refresher as well as introductory sessions for new time entry staff, or for those who want to go back to the basics again.

During this critical STARS post-implementation time coinciding with the advent of COVID-19, time entry staff and managers can reach out for one-on-one help from a Training Specialist on departmental time entry questions by contacting: ERPCommunications@hctx.net. Details on the Online Time Entry Classes will soon be sent out to all departmental STARS contacts.



Employee Service Anniversaries

Congratulations to the following Auditor's Office employees who have reached anniversary milestones with Harris County as of July 31, 2020

Over 30 years

Yolanda Anderson	33
Steve Hoza	30

Over 15 years

Tijuana Smith	15
Ronald Foster	15
Eric Pertl	15

Over 5 years

Angela Billard	8
Ingrid St. Cyr	8
La'Sha Kelly	8
Sharonda Cato	8
Simone Mergerson	7
Felipe Alvarado	7
Derryle Simpson	7
Justin Alexander	7
Michelle Ramsey	7
Jolanda Smith	7
Damodar Tripathee	7
Athena Reece	7
Davina Hewitt	7
Yolanda Gentry	7
Maricela Barrera	7
Sonia Johnson	7
Veronica Kanode	6
Richard Pena	6
Penney Kazee-Davis	6
Kirk Mashue	6
Valerie Pena	6
Danielle Davillier	6
Carol Chatman	6
Marie Xefteris	6
Joan Wu	6
Destinee Lester	6
Dora Sanchez	6
Felicia Okatta	6
Reginald Yancey	6
Arlen Alanis	6
Merle Ray	6
Argentina Vazquez	6
Francis Garcia	6
Gregory Johnson	6
Ganel Sykes	6
Mario Galvan	6

Over 20 years

Wendee McCain	29
Synithia Jacquet	27
Michael Post	23
Kimberly Lewis	23
Connie Kirkpatrick	23
Timothy Leonard	20
Patricia Mata	20

Over 10 years

Winfred Iles	14
Betty Lew	13
David Tish	13
Sylvia Mercy	13
Patricia Moreno	13
Wai Leung	13
Marie Cary	12
Yesenia Cantu	12
Porter Broyles	11
David Clark	11
Mellanie Tostado	11
Robert Jones	11
Velia Chavez	11
Edgar Serrano	10
JoAnn Lloyd	10
Tera Thompson	10
Ada Rodriguez	10

Over 15 years

Toya Edwards	19
Paul Wilden	19
Filomeno Vilorio	19
Tom Ngo	19
Jacqueline Ards	18
Nicholas McGee	18
Jose Mendoza	17
Carol Market	17
Anna Spalding	17
Brenda Tucker	17
Martha Abdullah	16
Connie Sanders	16
Clarese Brown	16
Cynthia Smith	16
Jennifer Pham	15

Over 5 years

Sonja Lewis-Jones	9
Yang Liu	8
Marie LaGrone	8
Bobby Cato	8
Jacqueline Roney	8
Kimberlyn Olison	8

Congratulations to each of YOU!!!

Over 5 years	
Paul Witt	6
Maria Alfaro	6
Sherrie McClenon	5
Carmella Sanford	5
Lorraine Wright	5
John Rowan	5
Jeffrey Boso	5
Carolyn Phillips	5
Jenny Ly	5

Less than 5 years	
Amy Yarbrough	4
Patrick Rodriguez	4
Shannon Norman	4
Tenishia Brown	4
Terence Drew	4
Craig McFarlin	4
Tien Nguyen	4
Steven Mathews	4
Ana Flores	4
Shaleeta Mitchell	4
Wanda Rodriguez	4
Douglas Chemaly	4
Elizabeth Garcia	4
Melissa Villalobos	4
Rebecca Dupree	4
Axel Nieves	4
Carmen Garcia	4
Silvia Diaz	3
Anthony Li	3
Alfred Rodriguez	3
Joshua Sadler	3
Ola Ogundipe	3
John Steen	3
Amanda Rich	3

Less than 5 years	
Angela Fu	3
Shawn Varghese	3
Reagan Sharkey	3
Mary Drugovich	3
Leslie Wilks Garcia	3
Owanda Runnels	3
Dan Baumel	3
Tachia Smith	2
Sharlene Cate	2
JoAnn Guerrero	2
Apryl Erwin	2
Grant Griffin	2
Patricia Sanchez	2
Brandy Shaw	2
Rebecca Luis	2
Yanhua Qiu	2
Krissi Boggess	2
Andrew Walters	2
Eddie Juarez, Jr.	2
Christina Hollie	2
Tracy McChristian	2
Ann Payne	2
Alma Figueroa	2
Alina Valtierra	2
Shelby Hylton	2
Delores Perez	2
Nina Harris	2
Mayra Tello	2
Darya Trapeznikova	2
Anthony Dunn, Jr.	2
Gynel Irakoze	2
Tishondria Williams	2
Taneka Seals	2
Moheb Raoufi	2
Christopher Meek	2
Alexandra Gonzales	2
Chad Sussen	1
LeRoy Mayers	1
Emelia Suarez	1

Less than 5 years	
Anthony Tran	1
Omar Johnson	1
Kelly Aubrey	1
Tracy Smith	1
Jade Butcher	1
Adriana Sanchez	1
Jayell Scott	1
ShaKeshia Leday	1
Errika Perkins	1
Imran Khan	1
Bruce Tran	1
Sharon Brantley Smith	1
Shirley Evans	1
Nathan Bingham	1
Destiny Carter	<1
Vince Varkey	<1
Kris Hall	<1
Jennifer Whitton	<1
David Perez	<1
Cassadara Johnson	<1
Jennifer Leal	<1
Denita Vidrine	<1
Kristopher Goodly	<1
Ashley Fowler	<1
Jessica Sevilla	<1
Nancy Cook	<1
Cynthia Dillard	<1
Ronda Risley	<1
Sheerah Walker	<1
Keisha David	<1
Rhonda King	<1
Tam Lam	<1
Veronica Kasdorf	<1
Felecia Wilmore	<1
April Johnson	<1

Congratulations to each of YOU!!!



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