

Finance Business Operations Forum

February 15, 2023



California State University
MONTEREY BAY

Agenda

1. Accounting
 - Accounting & Payroll staffing changes
2. Business Support Services
 - Contract Tracking
 - Procurement Training
3. Information Security Updates
4. Next BOF & Finance Office Hours
5. Q&A



Accounting

Susan Koch, Director - Accounting



Business Support Services

Reyola Carlisle, Lead Senior Contracts Analyst



Contract Tracking

File Automation Forms Contracts_Tracking ☆

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	Contract#	Amendme	Vendor Name	Department Number	Primary Dept Contact	As
10	CID0000005	None	Gothic Grounds Management Inc.	1085-FMD	Tammy Bishop/Mark Bennett	R
11	CID0000006	None	GreenWaste Recovery Inc.	1084-FMD	Tammy Bishop/Mark Bennett	R
12	CID0000007	None	A.E.T Services Inc., dba Orkin Central Coast	1085-FMD	Tammy Bishop/Mark Bennett	R
13	CID0000008	None	IPM Specialist LLC	1085-FMD	Tammy Bishop/Mark Bennett	R
14	CID0000009		SP Plus Corporation	1111-S&TP	Sloan Campi	E
15	CID0000010		Frank M. Booth Inc.	1024-FMD	Tammy Bishop/Steve Pichler	R
16	CID0000011	None	Donald C. Urfer & Associates Inc.	1024-FMD	Tammy Bishop	R
17	CID0000012		CSU Chancellor's Office	1049-Office CIO	Luisa Dizon	S
18	CID0000013		Blue Beyond Consulting	1009-CAHSS	Juanita Cole	E
19	CID0000014		ABMS Solutions	1187-Physician Asst.	Christopher Forest	
20	CID0000015		Anthology	1049-Office CIO	Chip Lenno	
21	CID0000016		Naz & Co Inc., dba True Blue Automation Service:	1030-Maintenance & Opert.	Andy Sierra	M
22	CID0000017		EndTab LLC	1183-Title IX Admin.	Amy Gessler	



Contract Tracking

Contract_Type	Contract Effective Date	Contract End Date	Contract Options Years	Contract Value	Cost Savings
(i)	(i)	(i)	(i)	(i)	(i)
Service	10/27/22	10/27/23	0	See PO	0
Service Order	07/01/21	06/30/23	1	See PO	0
RFP	07/01/19	06/30/25	2 - 2 year	See yearly POs	0
RFP	07/01/20	06/30/23	1 - 2 year	See yearly POs	0
RFP	04/01/20	06/30/25	3	See yearly PO's	0
RFQ	07/01/21	06/30/22	4	See yearly POs	0
Service	04/12/19	06/30/24	0	See yearly POs	0
RFP	08/01/22	07/31/27	5		0
IFB	10/19/22	08/11/23	0	\$3,155,000	0
Service	11/30/22	11/30/23	0	See PO	0
Service	11/10/22	04/30/23	0	\$67,200	0
Service	12/01/22	12/01/23	0	\$45,000	0
Service	11/18/22	11/18/23	0		0



Contract Tracking

- This Smartsheet is a stop gap until the campus transitions to CSU Buy.
- Procurement and Contracts staff are responsible for tracking expiration dates and any amendments for multi-year contracts.



Comprehensive Procurement Training

Available in March, a comprehensive review of procurement.

For those interested in training, please send a request to procurement@csumb.edu.

The 4 hour session will cover requisition to payment options, in an effort to provide the campus with information to demystify the procurement process.



Procurement Training Objectives

Raise awareness and proficiency in procurement, contract standards, policies and procedures

Maintain integrity of procurement and contracting process

Understanding Responsibilities of both the department and the PCS staff during a procurement process



Procurement and Contracts Team

Reyola Carlisle, Lead Senior Contracts Analyst,
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Calista Gasbarri, Property Specialist,
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Becky Martinez, Student Assistant,
831-582-4073 bemartinez@csumb.edu



Procurement Open Office Hours

Every other Thursday at 11:00 a.m. to be added to the invitation, please email procurement@csumb.edu



Information Security Updates

Mary Mauro

Senior Director Enterprise Data Management and Information Security Officer
Division of Information Technology



Information Security @ CSUMB

- Campus Information Security
- Data Quality
- IT Contract Approval Process
- Accepting Payment Cards - PCI
- Sensitive Data Inventory
- File Storage
- Data Security Training
- Security Awareness
- Security Awareness Knowledge Base References
- Tech Tip Tuesdays



Campus Information Security

Data and information are valuable campus assets

- Security is distributed across IT
 - Network, Technology Support, DataBase, Access Control, Application Security
- Includes other campus personnel
 - Physical and environmental security, personal and financial information (PII), health information (PHI)
- Email: InformationSecurity@csumb.edu
- Web: csumb.edu/it/security



ISO Responsibilities

- Risk assessments
- President's annual IT risk mitigation plan
- Audits
- Policies
- Compliance
- Business impact analysis
- Data loss prevention
- Awareness
- [CSU Information Security Roles](#) defined



Data Quality (Integrity)

CIA - Confidentiality, integrity and availability

Record creation is critical - [Tech Tip Tuesday Episode 14](#)

- Data entry is the front-line for data quality
- Data quality is essential for our success

Data entry errors

- Propagate and create risk
- Impact student success
- [System Problem Ticket](#) (Report an Issue)



IT Contract Approval Process

1. Provide your vendor with:
 - a. Accessibility info and forms
 - i. [Accessibility Conformance Report](#) (VPAT)
 - ii. [Equally Effective Alternate Access Plan](#) - *limited option for department accepting responsibility when VPAT is not available*
 - b. [Higher Education Community Vendor Assessment Tool](#) (HEISC)
 - i. Risk assessment when using sensitive information ([Educause definition](#))
 - c. [CSU General Provisions](#) (for all contracts)
 - d. [IT Supplemental Provisions](#) (if using sensitive data)
2. Submit an [IT Contract Approval Ticket](#)
3. *Then* communicate through the ticket.



Accepting Payment Cards

Credit cards → Payment Card Industry (PCI) standards

- Submit a [PCI Equipment or System Review](#) ticket for review and approval

Recent gap analysis for PCI compliance and procedures

- Campus is transitioning to more compliant and less network dependent PCI processes
 - → Point to point encryption (P2PE) devices for most campus merchants
 - → Departmental annual attestations
 - ↑ Campus PCI governance
 - ↑ Departmental policies for PCI
 - ↑ Annual training required for PCI merchants



Level 1 Data - Confidential

- Passwords
- Personal Identification Numbers
- Birth date combined with last four digits of SSN and name
- Credit card numbers with cardholder name
- Driver's license number
- Social Security number



Sensitive Data Inventory

CSU policy requires an annual inventory of Level 1 Data

- [Classification Description: Level 1 - Confidential](#)
- [Asset Management Policy](#)
- [Data Retention and Disposition](#)

Do not store Level 1 Data outside the system of record

Level 1 Data users should routinely scan their assigned assets for sensitive data

- [Spirion - Data Loss Prevention \(DLP\)](#)
- [Spirion - Quick Start Guide](#)

Level 1 Data should never be accessed by personal devices



File Storage Changes Coming

- Quotas on file storage
 - Fall 2023 - Google Workplace storage limitations (e.g. Email, Drive, etc.)
 - **csumbinfo** may be retired - security, shared access, and backups
- Options - sensitivity of the data stored, requirements
 - System of Record
 - Sensitive file storage - should be limited and inventoried
 - Retention and appropriate storage considerations
 - Large file storage needs
 - Long term file storage and retrieval
 - File archive
 - Shared access



Data Security Training Compliance

- [SumTotal](#) Data Security and FERPA Training assigned to all active campus employees
 - Assigned on hire
 - Every October for CyberSecurity Awareness Month
 - Special training for students in classes requiring access to sensitive data
- Level 1 data access?
 - Required annual training
 - Retain access privileges

Source: [CSU Policy - Campus Security Awareness and Training Program](#)



Security Awareness

October is National CyberSecurity Awareness Month

- Data Security and FERPA training assignments renewed (employees only)
- Campus events with activities for students
 - October and April
 - Shared activities with other CSU partner campuses (webinars, contests, etc)
 - [CyberSecurity Awareness Heroes](#) (October 2022)



Security Awareness (cont.)

- Phishing awareness - four campaigns/year
- [Latest phishing campaign stats](#) (1/30 - 2/4)
- 'Clicked' training material available to all campus

EMAILS	delivered	opened	clicked
staff	1,059	67%	3%
faculty	902	57%	3%
students	11,783	49%	9%



Security Awareness Knowledge Base

Phishing and Online Security:

- [Top 10 Internet Safety Rules & What Not to Do Online](#)
- [How to Spot a Phish](#)
- [How to Report a Phish](#)
- [So you've been Phished, now what?](#)
- [15 Tips to Help Keep Your Mobile Devices Secure](#)
- [Staying Secure on Your Smartphone or Tablet](#)
- [Smishing \(Text Message Phishing\)](#)

IT Contract Approval (Accessibility, Security):

- [IT Contract Approval Process](#)

Passwords and MFA:

- [Password Security Tips](#)
- [Okta MultiFactor Authentication](#)
- [How to Set Up and Use a Security Key](#)
- [How to Set Up and Use Okta Verify](#)

Data Loss Prevention (DLP):

- [Spirion - Data Loss Prevention \(DLP\)](#)
- [Spirion - Data Loss Prevention \(DLP\), A Quick Start Guide](#)

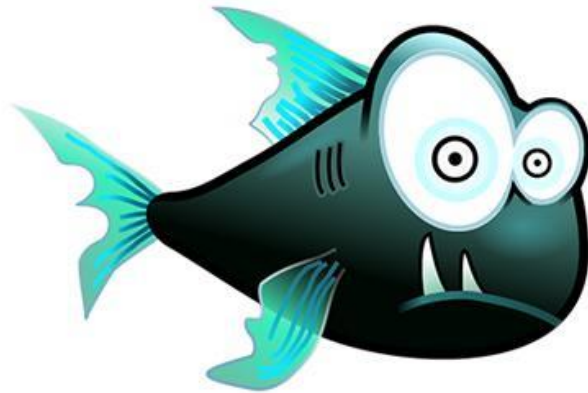


Security Related Tech Tip Tuesdays

Tech Tip Tuesdays frequently focus on security awareness!

- [Learn about information security at CSUMB](#)
- [What is cybersecurity and what can you expect from Cybersecurity Awareness Month at CSUMB](#)
- [Multifactor authentication and password strength](#)
- [Spot the Phish and other scams](#)
- [Staying safe in Cyberspace](#)
- [Multifactor Authentication and Why Okta Verify](#)





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Next BOF

03/15/2023



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Finance Office Hours

Accounting

- Weekly on Fridays (02/17) at 10:30 a.m.
- <https://csumb.zoom.us/j/85920601537>

Budget

- Bi-weekly on Wednesdays (03/01) at 11:00 a.m.
- <https://csumb.zoom.us/j/87856562232>

BSS

- Bi-weekly on Thursdays (02/16) at 11:00 a.m.
- meet.google.com/jbt-vrps-ofz

Please contact bof@csumb.edu for details.





Questions??



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