Finance

Business Operations Forum

February 15, 2023
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

<table>
<thead>
<tr>
<th>Contract#</th>
<th>Amendment</th>
<th>Vendor Name</th>
<th>Department Number</th>
<th>Primary Dept Contact</th>
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<td>None</td>
<td>Gothic Grounds Management Inc.</td>
<td>1085-FMD</td>
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<td>1111-S&amp;TP</td>
<td>Sloan Campi</td>
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<td>CID0000012</td>
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<td>CSU Chancellor's Office</td>
<td>1049-Office CIO</td>
<td>Luisa Dizon</td>
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<td>Blue Beyond Consulting</td>
<td>1009-CAHSS</td>
<td>Juanita Cole</td>
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<td>1187-Physician Asst.</td>
<td>Christopher Forest</td>
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## Contract Tracking

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<tr>
<th>Contract Type</th>
<th>Contract Effective Date</th>
<th>Contract End Date</th>
<th>Contract Options Years</th>
<th>Contract Value</th>
<th>Cost Savings</th>
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<td>07/01/19</td>
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<td>06/30/23</td>
<td>1 - 2 year</td>
<td>See yearly POs</td>
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<td>06/30/25</td>
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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, 831-582-3506  rcarlisle@csumb.edu

Eva Salas, Strategic Procurement Specialist, 831-582-3751  esalas@csumb.edu

Miguel Silva, Contracts Analyst, 831-582-5058  msilva@csumb.edu

Calista Gasbarri, Property Specialist, 831-582-4619  cgasbarri@csumb.edu

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

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<th>EMAILS</th>
<th>delivered</th>
<th>opened</th>
<th>clicked</th>
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</thead>
<tbody>
<tr>
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<td>67%</td>
<td>3%</td>
</tr>
<tr>
<td>faculty</td>
<td>902</td>
<td>57%</td>
<td>3%</td>
</tr>
<tr>
<td>students</td>
<td>11,783</td>
<td>49%</td>
<td>9%</td>
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## 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)

### 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

### IT Contract Approval (Accessibility, Security):
- IT Contract Approval Process
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
BEWARE
OF THE
PHISH
Next BOF

03/15/2023
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??