
HRS Staff Orientation Guide

Acknowledgments

The Administrative Support Team (AST) constructed this guide. It is meant for use as a reference guide for all staff and as a brief introduction to the HRS Program.

This manual is updated periodically. Please forward suggestions or changes to Joyce Sisung.

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Last Update: 06/10/2013 3:39:00 PM

Table of Contents

<u>ORGANIZATIONAL OVERVIEW</u>	3
INSTITUTE FOR SOCIAL RESEARCH	3
CENTER FOR INSTITUTE SERVICES (CIS)	3
SURVEY RESEARCH CENTER	4
ECONOMIC BEHAVIOR PROGRAM OVERVIEW	5
EBP-HEALTH AND RETIREMENT STUDIES PROGRAM OVERVIEW	5
EBP-HRS PROGRAM SPACE ASSIGNMENTS ISR-THOMPSON	7
<u>MAJOR RESEARCH EFFORTS</u>	9
HEALTH AND RETIREMENT STUDY (HRS)	9
MICHIGAN CENTER ON THE DEMOGRAPHY OF AGING (MICDA)	9
MICHIGAN CENSUS RESEARCH DATA CENTER (MCRDC)	10
BEHAVIOR ON SURVEYS AND IN THE ECONOMY USING HRS (WILLIS P01)	10
COGNITION AND AGING IN THE USA (COGUSA) STUDY	10
<u>STAFF</u>	11
<u>RESOURCES, SERVICES AND FACILITIES</u>	12
ACRONYMS	12
ADDRESS	12
BUILDING ACCESS	12
CLIMATE CONTROL	12
COMMON AREA REFRIGERATORS AND MICROWAVES	12
COMPUTING	13
COMPUTING SECURITY – DESKTOP	14
CONFIDENTIALITY PLEDGE	14
CONFERENCE ROOMS	14
ISR CONFERENCE ROOMS	14
HRS CONFERENCE ROOM (3038 ISR)	15

CONFERENCE LINE	15
CUSTODIAL SERVICES	15
DEPARTMENT ID	15
DUPLICATING/PHOTOCOPYING	15
FLOOR COPYING - HRS	16
DUPLICATING SERVICES	16
PERSONAL COPY REIMBURSEMENTS	16
ELECTRONIC TIMEKEEPING SYSTEM (ET)	17
WHAT IS ET?	17
ISR PAYROLL CONTACT INFORMATION	17
EMERGENCIES	17
BUILDING & WEATHER	17
FIRE WARNINGS.....	17
SEVERE WEATHER.....	18
EMERGENCY CONTACT INFO	18
ERGONOMICS	18
EXHIBITS	18
FACILITIES AND FURNITURE	18
FACSIMILE MACHINES	18
KEYS	19
MAIL/MAILBOXES	19
MAILBOXES	19
INCOMING MAIL (HRS)	19
OUTGOING MAIL (HRS)	19
REGULAR VS. CAMPUS VS. OTHER MAIL SERVICES.....	19
PERSONAL MAIL	20
MAILROOM SERVICES	20
PARTY FUND	20
PEERS CERTIFICATION	20
PRINTERS-HRS	20
NETWORK PRINTERS	20
PRINTER PAPER	21
PRINTER TONER CARTRIDGES	21
PROFESSIONAL DEVELOPMENT/TRAINING	21
PURCHASING SOFTWARE, EQUIPMENT, SUPPLIES OR SERVICES	21
GENERAL SUPPLIES.....	21
SPECIAL REQUESTS	22
RECYCLING	22
REFERENCE MATERIALS	22
DATA RESOURCES.....	22
LIBRARIES.....	23
REPORTING ABSENCES	23
SHREDDING	23
STAFF MEETINGS	23
STANDARD VOICE GREETING	23
TELEPHONE DIRECTORIES	23
ONLINE DIRECTORIES CAN BE FOUND AT:	23
ISR STAFF DIRECTORY HTTP://COMPUTE.ISR.UMICH.EDU/DIRECTORY/DEFAULT.ASPX	23

MCOMMUNITY HTTPS://MCOMMUNITY.UMICH.EDU/	23
UM & ANN ARBOR PHONE BOOKS	23
WATER COOLER	23
VOICEMAIL	24

Organizational Overview

Institute for Social Research

The University of Michigan Institute for Social Research (ISR) is the world's largest academic social science survey and research organization. We are a leader in developing and applying new social science methods, and we are committed to educating the next generation of social scientists. After a rich 60-year history, we continue to broaden our scientific reach through international ventures and new collaboration with federal agencies, foundations, corporations, and private individuals.

ISR serves as a telescope on society, bringing the attitudes and behavior of people into clearer focus. Our annual budget of more than \$80 million supports the research of more than 200 scientists from 20 disciplines, including psychology, business, economics, public health, demography, statistics, and engineering.

Our large survey studies include the Reuters/University of Michigan Surveys of Consumers, the Health & Retirement Study, the National Survey of American Life, the Monitoring the Future Study, the Panel Study of Income Dynamics, and the World Values Study. These studies—providing data on voting behavior, teen drug and alcohol use, consumer confidence, the health and economic status of Black Americans, and other topics—are among our most visible work. But we also develop and test survey methodologies; conduct experimental studies; maintain and distribute the world's largest archive of social science data; and train and educate researchers and students from around the world in survey methodology and survey research.

The ISR Research Centers are: Center for Political Studies (CPS), Population Studies Center (PSC), Research Center for Group Dynamics (RCGD), Survey Research Center (SRC), and Inter-university Consortium for Political and Social Research (ICPSR).

Center for Institute Services (CIS)

CIS provides numerous services for the benefit of the Institute and all its Centers. CIS Sections include:

Accounting	764-8354
Audit	763-6308
Facilities	764-8354
Human Resources	764-4408
Information Desk	764-8354
Management Information Systems	647-1294
Office of the Assistant Director	764-8363
Office of the Director	763-8364

Research Administration	647-1367
Security	763-6308
Duplicating	647-1406
Mail Services	764-0365
Offsite Storage	647-8272

Survey Research Center

The Survey Research Center is the largest of the five Centers of the Institute for Social Research (ISR). For more than 50 years, the Survey Research Center has been a national and international leader in interdisciplinary social science research involving the collection or analysis of data from scientific sample surveys. First, this involves conducting basic and applied empirical survey-based research that is theoretically informed. SRC and the Institute for Social Research are pillars of empirical social science, but seek to bring their empiricism to bear on problems that are of both social and scientific importance. Second, but no less important, SRC's leadership involves the development, refinement, and propagation of the scientific method of survey research through teaching and training.

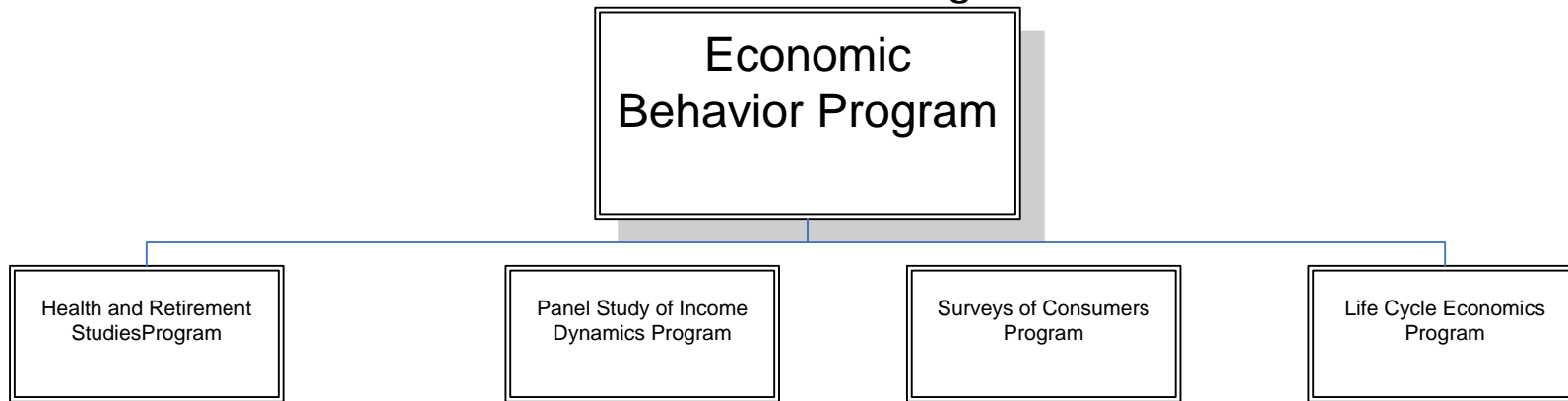
The research programs of the SRC are in continuing evolution. From the initial four programs in the 1940s and 1950s -- economic behavior, political behavior, organizational behavior, and survey methodology -- the SRC has grown to include a wide array of active research programs including:

- Economic Behavior
- Family & Demography
- Life Course Development
- Quantitative Methodology
- Social Environment & Health
- Socio-environmental Studies
- Social Indicators
- Survey Methodology
- Urban & Environmental Studies
- Youth and Social Issues

Each program is a national and international leader in theory and research in its respective area. Collectively the research programs have spawned, at a rate of about one per decade, a set of continuing major national data resources for social research and social policy: (1) the Survey of Consumer Attitudes; (2) the Panel Study of Income Dynamics; (3) the Monitoring the Future study of high school youth; (4) the Health and Retirement Study; (5) the Retirement Research Center; (6) the National Survey of Family Growth; and (7) the Youth, Education, and Society program.

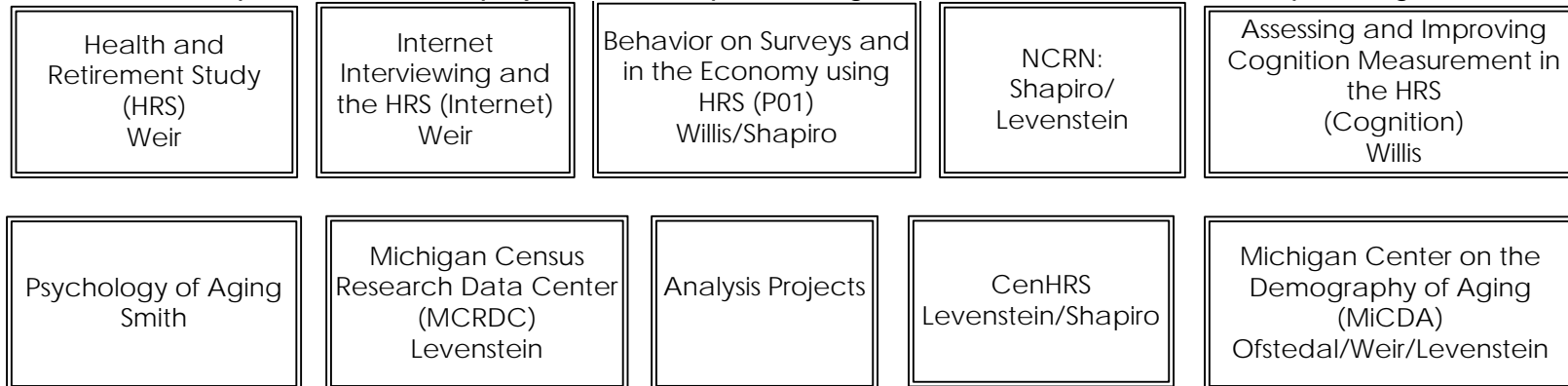
Survey Research Operations (SRO) is the operations branch of the Survey Research Center, providing a range of services in the areas of survey and statistical design, collection and processing of survey and other data, qualitative data collection, and data analysis. SRO is comprised of four technical sections: Data Collection and Processing Services, Project Services, Research Design & Development, and Survey Design & Analysis. Together they provide technical services to ISR, as well as to other departments within the University and organizations outside the University.

Economic Behavior Program Overview

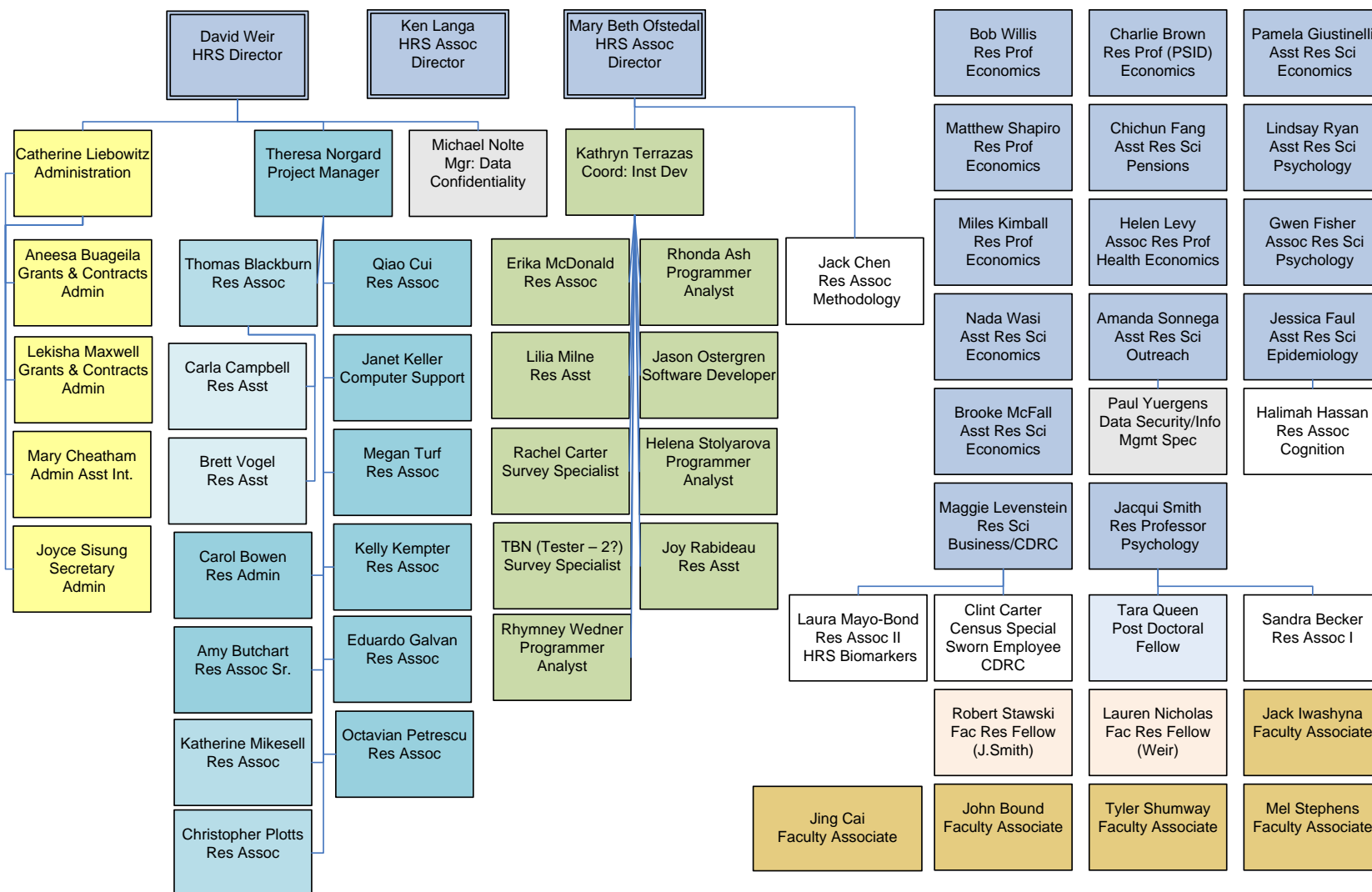


EBP-Health and Retirement Studies Program Overview

This is not a comprehensive list of projects, but will provide a general idea of the work we are pursuing.



HRS Program Administrative Reporting Relationships



Key

Blue = PRS

Lt Peach = Faculty Research Fellow/Research Investigator

Gold = Faculty Associate

EBP-HRS Program Space Assignments ISR-Thompson

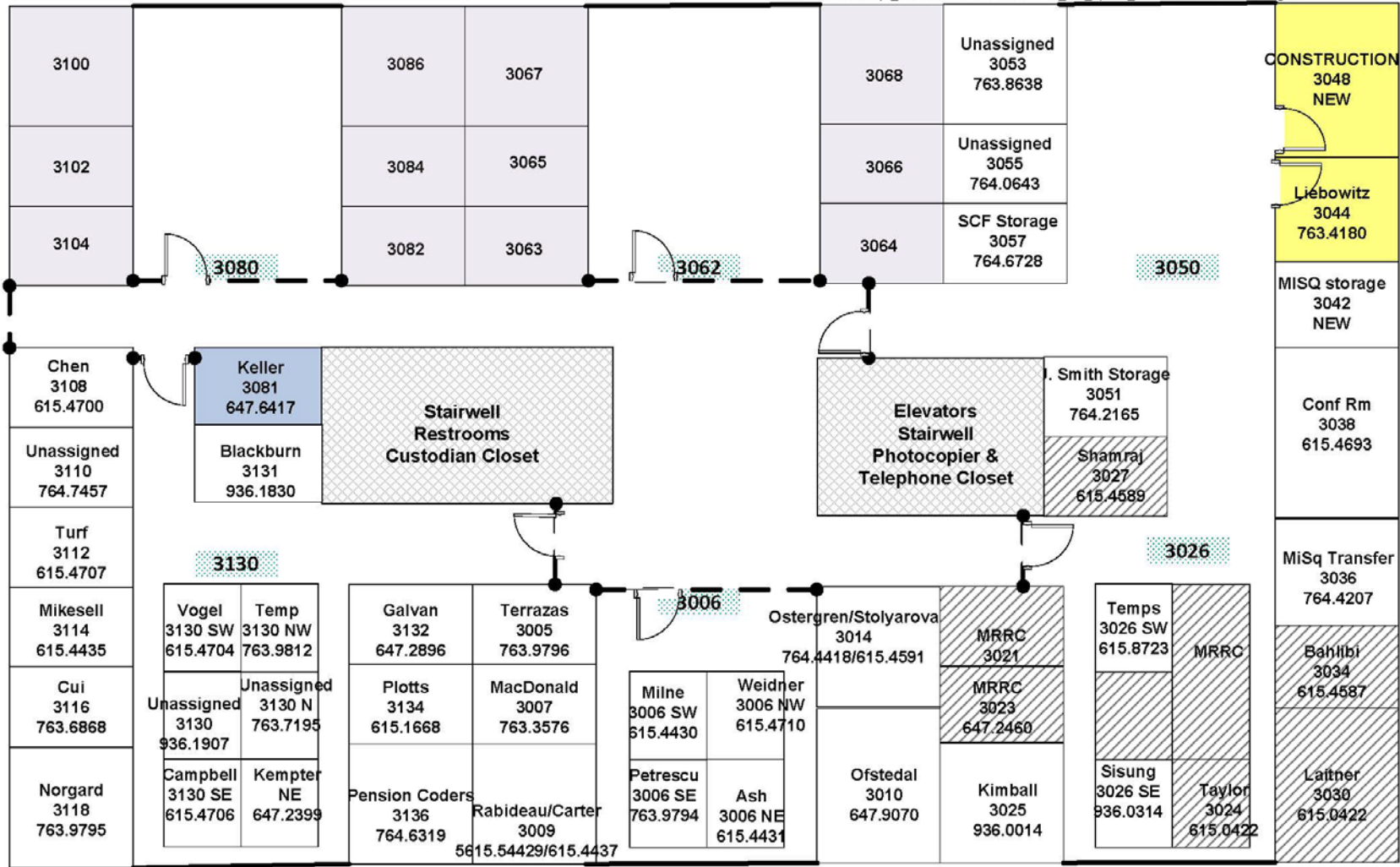
EBP-HRS THOMPSON Space Allocation

Assignments Summer 2013 – May 17, 2013

Key Legend

NEW	108B44	108B53 (3044) 108B51 (3048)	Default: 108B43
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V:\ADMIN\Cathys_Files\SPACE\2012-JUL-HRS_ISR_Space_Allocation.vsd 2011-Aug-15

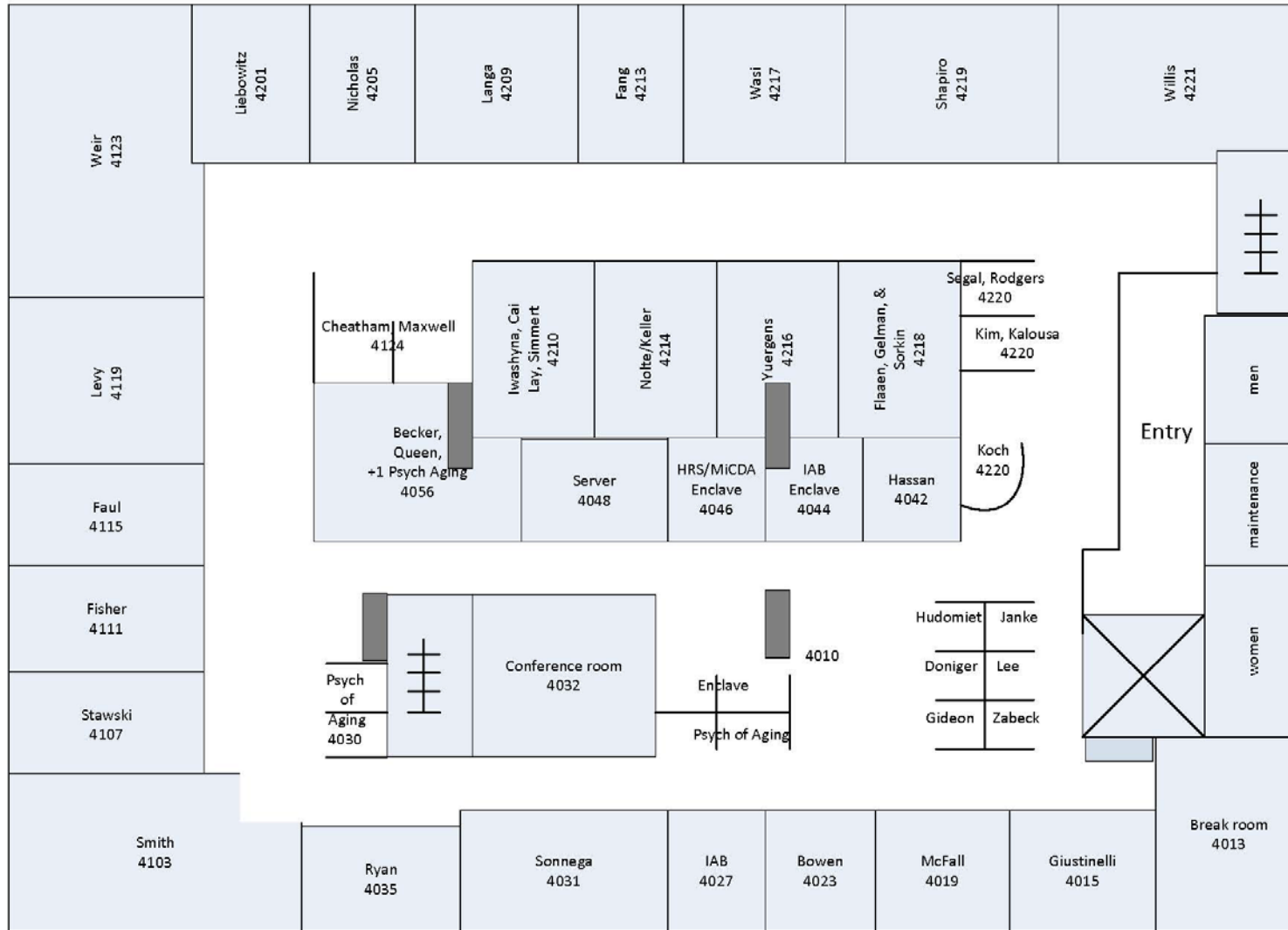


3201 Butchart (108B43; 763.2167); 3203 Mayo-Bond (108B43; 763.8856); 3205 Gouskova (108B43; 936.0307); 3257 Levenstein (615.9088)

EBP-HRS Michigan Square Space Allocation

Assignments Summer 2013

ALPHABETICAL LISTING



Cheatham	4124
Becker	4056
Bowen	4023
Buageila	4030
Cai	4210
Chen	4010
Doniger	4010
Dunbar	4056
Fang	4213
Faul	4115
Fisher	4111
Flaaen	4218
Gelman	4218
Gideon	4010
Giustinelli	4015
Giasson	4056
Hassan	4042
Hochfellner	4027
Hudomiet	4010
Iwashyna	4210
Kim	4220
Knapp	4010
Langa	4209
Lay	4210
Lee	4010
Levy	4119
Liebowitz	4201
Maxwell	4124
McFall	4019
Nicholas	4205
Nolte	4214
Park	4030
Parsons	4030
Queen	4056
Ryan	4035
Shapiro	4219
Simmert	4210
Smith	4103
Sonnega	4031
Sorkin	4218
Stawski	4107
Wasi	4217
Weir	4123
Willis	4221
Yuergens	4216
Zabeck	4010
Zhang	4010
Breakroom	4013
Conference Room	4032
Enclave	4044, 4046
Reception	4220

MAJOR RESEARCH EFFORTS

Health and Retirement Study (HRS)

The HRS is designed to provide a uniquely rich, nationally representative longitudinal dataset for the community of scientific and policy researchers who study the health, economics and demography of aging. The design and execution of the survey has involved the active participation of a large number of scientists from a broad array of disciplines including economics, sociology, demography, psychology, and medicine from institutions in all parts of the United States and other countries.

The steady state design of the HRS creates great analytic strength. It provides a research data base that can simultaneously support continuous cross-sectional descriptions of the U.S. population over the age of fifty-five, longitudinal studies of a given cohort over a substantial period of time (up to 18 years by 2010 for the original HRS cohort, following them from age 51-61 to age 69-79) and research on cross-cohort trends. By 2010 the HRS will be able to support cross-cohort comparisons of trajectories of health, labor supply, or wealth accumulation for persons who entered their 50's in 1992, 1998, 2004 and 2010. All these types of studies can be conducted utilizing variables of importance to the disciplines of economics, health, demography, sociology and psychology. The fact that data from all these domains are collected in the same survey creates opportunities for new types of interdisciplinary research that are now beginning to emerge. In addition, this design provides researchers with the capacity to study the effects of expected and unexpected changes in policy, the economy or the society in a timely way, taking advantage of the many "natural experiments" that occur over time. For example, researchers can study the effects of the run up of the stock market during the 90's and the stock market decline after 2001 on savings and retirement decisions. As another example, we are endeavoring to increase the ability of the HRS to measure the effects of changes in prescription drug policy by expanding our measurements of prescription drug use. During Yr. 17-22 (2006-2011), we expanded survey measurements of biomarkers and psychosocial measures, creating new research opportunities on the relationships between subjective and objective measures of well-being and health. We also expanded our minority representation with ARRA supplemental funding during the 2010 data collection. In Yr. 23-24, we continue to grow our administrative linkage and biomarker data collection efforts, as well as explore more efficient vehicles for assessing cognition and enrolling new cohorts.

Michigan Center on the Demography of Aging (MiCDA)

The Michigan P30 Center on the Demography of Aging is a joint program of the Population Studies Center and Survey Research Center, Institute for Social Research. The goal is to spur new research on the economics and demography of aging and encourage use of major datasets in the field.

MiCDA focuses on the scientific themes and approaches of health, work and retirement; interactions between health and economic status over time; health and economic status of diverse racial and ethnic populations; biodemography of aging; demography and economics of dementia; cohort analyses of current and future retirees; comparative

international research; and the value of linked data and methods for ensuring confidentiality in research.

The Center is organized by cores: Administration, Pilot Projects/Faculty Development, International Networks, Outreach, and, Statistical Data Enclave.

Michigan Census Research Data Center (MCRDC)

The Michigan Census Research Data Center (MCRDC) is a joint project of the U.S. Bureau of the Census and the University of Michigan. It enables qualified, confidentiality-abiding researchers with approved projects to access confidential, unpublished Census Bureau data under the provisions of Title 13, sec. 9 U.S.C.. The Census Bureau's Center for Economic Studies has developed and put into practice the concept of Research Data Centers (RDCs). The RDCs provide a secure Census Bureau environment where researchers may have limited access to confidential economic and demographic microdata, with appropriate safeguards to protect data confidentiality. This controlled environment ensures that the Census Bureau's standards for ensuring the confidentiality of data by its census and survey respondents is rigorously maintained.

The ability to analyze data on individuals, households, establishments, and firms has enormous scientific benefits. These include the ability to make full use of the information collected by government agencies; to analyze the behavior of individuals and firms taking into account the heterogeneity of behavior and characteristics; and to combine sources of data at the individual level to study relationships obscured by more aggregate data.

Behavior on Surveys and in the Economy Using HRS (Willis P01)

This program project (or P01) is designed to combine several heretofore disciplinarily separate, but rapidly advancing theoretical and empirical lines of research in economics, econometrics, cognitive psychology, social psychology and survey methodology to study connections between people's behavior on surveys and their economic behavior in the real world and the consequences of this behavior for subjective measures of well-being and objective measures of economic welfare.

Cognition and Aging in the USA (CogUSA) Study

In 2006, the National Institute on Aging funded an initiative entitled "Assessing and Improving Cognition Measurement in the HRS." The Principal Investigator is Jack McArdle, a quantitative psychologist at USC and HRS Co-Investigator. We aim to assess practice effects as well as evaluate other change in cognitive test performance across the three waves. The major activity of the project is the collection of in-person cognitive measures on a large nationally representative sample of about 1700 persons born in 1956 or before, measured longitudinally at up to three separate occasions with varying intervals. In the first phase, respondents completed a portion of the existing Health and Retirement Study (HRS) survey (demographics, health, and cognition) and a new set of cognitive measures based on the Woodcock Johnson-III (WJ-III) cognitive test battery via telephone. In the second phase, respondents completed a more lengthy battery of measures (including cognitive tasks based on the WJ-III, WAIS, and additional measures of memory, executive functioning, affect, and personality) administered face-to-face in the respondent's home. The study involved initial interviews (telephone and face-to-face) with a telephone interview within 1 to 24 months of their

face-to-face interview. The data collected in this study generated a public-use dataset to be analyzed for improving existing HRS cognitive measures.

STAFF

The HRS program houses a large staff within the Survey Research Center's Economic Behavior Program. This staff is divided into various groups by function. There are 3 major groups: the Primary Research Staff (PRS), or faculty; the research support staff; and the administrative support team (AST). We also house pre- and post-doctoral trainees, listed below as Research Fellows. (Individuals are listed below alphabetically within each of the functional groups.)

Primary Research Staff:

Charles Brown (PSID)
Chichun Fang
Jessica Faul
Gwenith Fisher
Pamela Giustinelli
Miles Kimball
Ken Langa
Maggie Levenstein
Helen Levy
Brooke McFall
Mary Beth Ofstedal
Bill Rodgers (emeritus)
Lindsay Ryan
Matthew Shapiro
Jacqui Smith
Amanda Sonnega
Nada Wasi
David Weir
Robert Willis

Faculty Research Fellows:

Lauren Nicholas
Robert Stawski

Research Investigators:

Faculty Associates:

John Bound
Jing Cai
Jack Iwashyna
Tyler Shumway

Research Support Staff:

Rhonda Ash
Tom Blackburn
Sandra Becker
Amy Butchart
Carla Campbell
Clint Carter
Rachel Carter
Jack Chen
Qiao Cui
Eduardo Galvan
Halimah Hassan
Mohammed Kabeto
Janet Keller
Kelly Kempter
Erika MacDonald
Ryan McCammon
Laura Mayo-Bond
Kate Mikesell
Lilia Milne
Michael Nolte
Theresa Norgard
Jason Ostergren
Octavian Petrescu
Chris Plotts
Joy Rabideau
Helena Stolyarova
Kathy Terrazas
Megan Turf
Brett Vogel
Rhymney Weidner
Paul Yuergens

Administrative Support:

Carol Bowen
Aneesa Buageila
Mary Cheatham
Cathy Liebowitz
Lekisha Maxwell
Joyce Sisung

There are also many students and temporary staff who work on the various projects.

RESOURCES, SERVICES AND FACILITIES

Acronyms

The University seems to run on acronyms. A list of common acronyms can be found on the SRC Network – <\\k:\vol1\share\acronymall.doc>

Address

University of Michigan, Survey Research Center
[Room #] ISR
426 Thompson Street
Ann Arbor, MI 48106-1248

HRS Main Telephone Number: 734-936-0314
HRS Facsimile Number: 734-647-1186

If you are housed at our temporary Michigan Square space, please add [Room # MS] to the ISR line in your address.

Building Access

The building is accessed by swiping your picture I.D. M-Card. Requests for building access and/or room keys should be directed through your supervisor to Cathy Liebowitz. An ISR Key and Card Access Authorization Form will be completed, and it must be approved by the SRC Director's Office. Once the form is complete, staff may pick up their key(s) from the ISR Reception area on the first floor. For Michigan Square: an additional key card is required to enter the space – Cathy Liebowitz may approve these requests.

Climate Control

Each office and most bays have some degree of climate control. Although the Institute controls the actual temperature, there are thermostats that can be adjusted warmer or colder. Note: the thermostats typically control the temperature/airflow for several work spaces and should be adjusted only in extreme circumstances, or with the consent of all affected parties.

For Michigan Square: There are four quadrants controlled by separate thermostats for each. These are very temperamental. Please see Mary Cheatham for Michigan Square facilities issues.

Common Area Refrigerators and Microwaves

Refrigerators are available for use by staff: one is located in the hallway outside the HRS conference room (3038 ISR), and smaller ones are in bay 3006 and the hallway leading from the 3130 bay to the Wing I elevators, and in room 4013 MS. Please label all food with your name and the date when you put it in one of these refrigerators. Unlabeled food that has been sitting around for a while is subject to disposal without warning.

Staff are responsible for cleaning and defrosting the refrigerators periodically. Volunteers for this duty are welcome. A cleaning schedule is posted on the front of the refrigerator; the

person(s) designated for a given month are responsible for setting the cleaning date and notifying staff.

Microwave ovens are located near the refrigerators. Staff share these microwaves. Please keep these areas clean by wiping up any spills or splatters that occur during use. Please note that the microwave across from 3038 should not be used to cook or re-heat fish or seafood due to food allergies in the area.

If you use refrigerators or microwaves you will be asked to help with periodic cleaning.

Please be respectful of shared, public spaces, such as the conference room, bay areas, restrooms etc. Clean up after yourself upon exiting these areas.

Computing

Janet Keller and Tom Blackburn can assist you with basic computer questions, so feel free to ask either of them for help.

You will be given an ISR login and University of Michigan Google email account. Your username is usually set up to be the same as your UM unickname. The systems have separate passwords, although you can set the passwords to be the same if you wish. When you first log onto your ISR computer, you must change your default Windows password. To do this, press ctrl-alt-delete, and select Change Password.

You will be made a member of one (or more) of the following groups: HRS Program Affiliates, HRS Program GSRAs, HRS Program MISQ, HRS Program PRS, HRS Program Regular, or HRS Program Temps. These groups are maintained in MCommunity by Janet Keller and SRC CMT.

Your UM gmail account can be accessed from a web browser anywhere:
<https://email.umich.edu>.

You should find your machine mapped to the HRS server **\\sr-Hrs\HRS (V:)**, as well as any additional areas relevant to your job duties. You will receive a detailed message from Janet Keller with more information about network folders.

Your personal folder **\\sr-Hrs\HRS\u\[isrlogin]**. Only you (and Janet Keller as our local network manager of the project Windows file server, and network administrators in Computing Support) can see this folder. You can put personal files there instead of on your hard drive, depending on how much space you have and your backup situation. All files on the network are backed up every weekend, and files that have changed are backed up every night. These backup tapes are overwritten after several months, so can't be used as a long-term recovery strategy if the files are deleted from the network, but for the short-term, are a very reliable source of disaster recovery. Please clearly mark any personal folders as PERSONAL.

In addition, all SRC users have a home directory on **\\SRC-Kahn\users\[isrlogin]** This will be mapped to J. This home directory is also private, inaccessible to other users, and backed up to tape by Computing daily if files have changed and weekly regardless of whether files have

changed. It's limited in size, but you can request more space by contacting Help Desk via the Web at <https://footprints.isr.umich.edu/MRcgi/MRentrancePage.pl>, or via phone at 3-7699.

We prefer to use Mozilla FireFox as the default browser for security reasons, and have set up your browsers with the home page set to the ISR Intranet website, which has a lot of useful information: <http://www.compute.isr.umich.edu/>

You may find the following section especially useful for quick tips. Follow these links: SRC Computing Support - > Computing Survival Guide.

The HRS staff web page is located here: <http://hrs-staff.isr.umich.edu/>. It is maintained by Michael Nolte, with Janet Keller as backup.

Our public HRS Web page is located at <http://hrsonline.isr.umich.edu/>

Each bay houses a shared network printer for large jobs. You may have up to 5 printers set up on your desktop pc; the nearest non-color printer to your office location will be assigned as your default printer. We do have one color printer, HRScolor8560dn, which is in the hall between bay 3050 and bay 3026. As color ink cartridges are quite expensive, please use this resource judiciously.

Computing Security – Desktop

Your workstation should be locked when leaving your station. This is done by keying in “Ctrl-Alt-Delete”. Upon returning, to unlock your workstation, again key in “Ctrl-Atl-Delete” and your password.

Confidentiality Pledge

All staff members are required to sign an annual Pledge to Safeguard Respondent Privacy, in accordance with ISR policy which can be found on the ISR Intranet web page <https://sites.isr.umich.edu/privacypledge/>

Conference Rooms

ISR Conference Rooms

Most ISR conference rooms can be booked using online reservations at: <http://compute.isr.umich.edu/> -> Facilities -> Reserve Room, which launches a separate webpage for AsureSpace Meeting Room Manager. This site allows you to book a conference room from your own computer. No special authorization is required to reserve a room in this system. The Admin Team can assist you if necessary.

To have the Mailroom set up tables and chairs for your meeting use the link on the ISR intranet homepage under Facilities for “Request Room Set Up” http://fop.isr.umich.edu/conference_room.cfm

We have our own A/V projection equipment or use what is already installed in the room. Janet and Joyce can assist you.

HRS Conference Room (3038 ISR)

HRS has a conference room located on the north side of the building between bays 3050 and 3030 for use specifically by project staff. There is additional conference space at Michigan Square (4032 MS). These rooms can be used for any project specific meeting. The conference room schedule is accessible on-line through Google calendars. Please be sure to sign up for the space before using it.

Staff are responsible for keeping the conference room neat and orderly.

Conference Line

The conference line schedule is accessible on-line through Google calendar – if you do not have access, please ask a member of the Administrative Team – we can help. **All use of this line must be reserved. No recurring reservations should be placed on the system without HRS Executive Committee approval.** The number is 1-877-593-3266 for external callers, or (61)5-2087 for local or UM callers. If a non-HRS project wishes to use this line, arrangements should be made through a member of the Admin Support Team – including a request for date/time and a project/grant to which charges for the call can be made.

At Michigan Square, we have a audio/video conferencing system. If you wish to use this system, please reserve the conference room – 4032 MISQ – and then request a reservation of the MAGOR conference system with Mary Cheatham. CMT assistance may be required for setting up the conference.

Custodial Services

Trash pickup is provided on a daily basis, Monday-Friday, for the bay areas. Office trash pickup is once a week. If you would like your trash picked up on another day of the week, place your bundled trash outside your office door and the custodians will empty it with the next pickup. Vacuuming is done on a regular basis. If you have immediate need of a vacuum cleaner, MRRC has an upright model that can be borrowed. Any problems with custodial services should be communicated to ISR Facilities, Operations and Planning via e-mail (isrfacilitiesandsupportservices@umich.edu), or call ISR Reception at (76)4-8354.

For Michigan Square: Trash and recycling are emptied daily Monday-Friday for bay and office space. Vacuuming and bathrooms cleaning also occur daily Monday-Friday. MISQ building issues should be communicated to ISR Facilities and Operations

Department ID

The Health and Retirement Study Program department ID is 585031. The Survey Research Center department ID is: 585000.

Duplicating/Photocopying

There are two methods of photocopying: the Floor Copier, located in the electrical closet and Duplicating Services (see below for more information), located in the basement – Room 160.

Floor Copying - HRS

HRS staff may access floor copiers in the Wing I telephone closet between the MRRC bay and the elevator area, or in the elevator bay in Wing II. For Michigan Square, there is a small copier/scanner near the mailboxes.

The floor copier/scanner is to be used for small or “rush” jobs, as the cost of these copies is higher than using Duplicating Services (\$.10/page - floor copies; \$.035/page - Duplicating). To use this copier a “copy code” is required. There are laminated forms with frequently used codes next to the fax machine. Please keep this form at your desk, or take it to the electrical closet, but do not leave it there for anyone to use. A floor-copying log is located in bay 3050 by the fax machine. Please complete the log each time you use a floor copier.

An additional floor copier is located in Wing II outside the PSID bay. This copier also requires the use of “copy codes”, however, NOT the same codes that are used for the copier in the electrical closet. A ‘cheat sheet’ of copy codes is also provided for this machine, and are located by the fax machine; again, please do not leave this form lying around for anyone to use.

Duplicating Services

Duplicating is located in the basement (Room 160). They provide additional services at reduced costs as compared to the floor copiers. Large jobs should always be taken to Duplicating. Additional services include: colored paper, 3-hole paper, binding, faxing, coverstock, bond paper, folding, booklet printing, lamination, etc. An online form should be filled out for all Duplicating jobs. This form can be accessed from the ISR Intranet page (<http://www.compute.isr.umich.edu/>).

Sending print jobs to Duplicating electronically:

Adding the printer:

- 1) Open Printers and Faxes window:
- 2) Double click on ADD PRINTER
- 3) Click NEXT
- 4) Select A NETWORK PRINTER...and click NEXT
- 5) Select CONNECT TO THIS PRINTER...and in the NAME box insert: \\isr-print\duplicating, you must also add DupcolorC550 to print color copies
- 6) Click NEXT
- 7) Click NO as default printer
- 8) Click FINISH
- 9) Open the Printers and Fax window again and check for correct install

Select the Print command as you normally would to print a job, but in your choice of printers select the duplicating printer (DupcolorC550 for color) and hit okay. An Online request for must be filled out for the job.

Personal Copy Reimbursements

We realize that at times, personal copies need to be made. When making personal copies, please indicate on the log sheet your name and “personal” under the account # column. When the log sheet is reconciled, a slip with the # of copies made and the amount owed (\$.10/copy)

will be deposited in your mailbox in the Admin Bay. Personal copying can also be taken to Duplicating Services and paid for in cash.

It is your responsibility to reimburse the account. See “Reimbursing for Personal Calls” under *Telephone Charging* of where/how to reimburse the account.

Electronic Timekeeping System (ET)

What is ET?

Every staff member (regular and temporary) is required to record their time electronically using Work Breakdown Structures (WBS) in a web-based timekeeping system. ET lets your supervisor review and approve your timesheet on-line as well. Each WBS is associated with project account. In general, WBS codes do not change, although new ones may be added and old ones deleted. If you need assistance with ET or a WBS, please see Carol Bowen.

See <http://compute.isr.umich.edu/form/Accounting/ET%20version%209%20training.pdf> for more detailed instructions. Deltek timesheets are at <https://timesheet.isr.umich.edu/DeltekTC/welcome.msv>

Note - all exception time (overtime and vacation) must be pre-approved by your supervisor. If you are planning on working additional hours for any reason, you must have prior approval.

ISR Payroll Contact Information

ET Mailbox	isr-etmailbox@umich.edu
Christy Cogan	647-1296
Jessica Torrentz	764-8371

Emergencies

In case of emergency, immediately dial 911 from any internal phone. UM Public Safety or Ann Arbor will respond to emergency calls.

Building & Weather

An alarm will sound in the event of a building or weather emergency. Staff should exit the building or take shelter in the basement via the stairways when the alarm sounds. The alarm sounding should not be ignored; staff should assume an actual emergency exists. Building Watch volunteers will direct you and will communicate the end of the alarm and the “all clear” to return to your office.

ISR conducts two fire drills a year. Staff are informed of the week the drill will take place, but not the actual day or time. Staff should exit the building via the stairways and congregate across Thompson Street by the open parking lot and wait for the “all clear” from Building Watch volunteers before re-entering the building.

Fire Warnings

An alarm will sound in the event of a building or weather emergency. Staff should exit the building or take shelter in the basement via the stairways when the alarm sounds. Assume

every alarm is an actual emergency. Building Watch volunteers will direct you and will communicate the end of the alarm and the “all clear” to return to your office.

ISR conducts two fire drills a year. Staff are informed of the week the drill will take place, but not the actual day or time. Staff should exit the building via the stairways and congregate across Thompson Street by the open parking lot and wait for the “all clear” from Building Watch volunteers before re-entering the building.

For Michigan Square: Staff should congregate at the North East corner of Liberty Plaza (intersection of Division and Liberty – same side as Michigan Square)

Severe Weather

Alarms will sound in the event of threatening weather. Staff should immediately take shelter in the basement until the “all clear” is announced. Every alarm should be treated as an actual emergency.

Emergency Contact Info

We request that you make sure your emergency contact information is up to date in Wolverine Access, under Employee Information. We also ask that you provide your supervisor with emergency contact information for our local personnel files, as well as share any allergies (food, exposure, medicine, etc) that would be good to keep in mind when organizing events, or in the event of an emergency. This is not a requirement, but can be useful.

Ergonomics

The University supports a healthy work environment, and provides ergonomic assistance. For ergonomics assistance, with your supervisor, see <http://hr.umich.edu/mhealthy/programs/ergonomics/how.html>

Exhibits

HRS staffs exhibits at several professional conferences throughout the calendar year. If you are potentially interested in staffing the booth, please discuss this with your supervisor. Supervisors are invited to forward recommendations of potential exhibit staffers to the HRS Executive Committee for consideration.

Facilities and Furniture

If you encounter any facilities problems (e.g., maintenance, lighting needs), these should be communicated directly to ISR Facilities, Operations & Planning via e-mail or by calling ISR Reception at 4-8354.

Furniture requests should be made through your supervisor. An AST member will likely be brought into the decision-making process to assist. The University has fairly strict purchasing guidelines. There are also established norms in SRC and ISR that will need to be followed.

Facsimile Machines

If your tasks require use of a fax machine, there is one in each building. At Thompson, the program fax line is 734-763-4180, and the machine is located near the printers across from the

3038 conference room. At Michigan Square, the printer on Mary Cheatham's desk (4124 MS) can be used as a fax, and the line is 734-615-5433.

Keys

Requests for building access and/or room keys should be directed through your supervisor to Cathy Liebowitz. An ISR Key and Card Access Authorization Form will be completed, and it must be approved by the SRC Director's Office. Once the form is complete, staff may pick up their key(s) from the ISR Reception area on the first floor. File/desk keys can be requested through Joyce Sisung. If HRS doesn't have the file/desk key you need on hand, it will be requested and delivered to you.

Mail/Mailboxes

Mailboxes

Each staff member at ISR Thompson has a mailbox in the HRS Admin bay (3050). For Michigan Square: Mailboxes are maintained in the recessed area to the right of the main entrance.

Incoming mail (HRS)

Mail at ISR is delivered to the "Incoming Mail" bin once a day at approximately 9:00 am. From there the mail will be distributed to individual mailboxes. For Michigan Square: Mail is delivered and picked up daily by the ISR Mailroom around 2:00pm.

Outgoing mail (HRS)

The ISR Mailroom delivers mail to the US Post Office twice a day (at noon and 5:00 pm). Outgoing mail may either be taken to the Mailroom or left in the "Outgoing Mail" bin to the right of the HRS mailboxes for pickup. Personal mail with postage affixed, campus mail, or project mail can be placed there for pickup. Any project mail that goes out must have an account number on the envelope. Note that mail left in the "Outgoing Mail" bin is only picked up during the regular morning delivery (at approximately 9:00 am). Any outgoing mail left in this bin after 9:00 am will not go out until the next day. You can take your post down to the Mailroom for the afternoon run to the US Post Office. There is also a mail chute across from the entrance to bay 3062 that will accommodate letter-sized mail.

Regular vs. Campus vs. Other mail services

There are several types of mail within the University community. The first is regular mail (US Postal Service). The second is campus mail, which usually comes in a manila campus mail envelope with places for name, department, room number and campus zip. Campus Mail does not require postage. Incoming Federal Express, UPS, DHL, and other express mail require the street address (426 Thompson) and different zip (48104) for quicker delivery to ISR.

UPS or express mail should be delivered directly to the ISR Mailroom. The last UPS pickup is at 7:00 pm (call Mailroom (4-0365) to confirm the others). Outgoing UPS, and express mail must include an "Internal Billing Reference" (project account number) for accounting purposes. In addition, UPS customer invoices should be removed before sending and given to Joyce. In the afternoon, it is probably best to walk the package, letter, box, etc. down to the Mailroom to insure that the package makes the last pickup. UPS has a pick up box in the hallway just

outside the mailroom; other carriers have their own slots in the unit just inside the Mailroom door, against the wall on the right hand side.

Personal mail

Personal mail can be sent and received at ISR as long as required postage is affixed to the package or letter. Postage stamps may be purchased from the ISR Receptionist office. USPS postal regulations require that any package over 16 oz. be sent directly from the post office, and ISR will not accept these packages. Personal items can also be sent via FedEx or UPS using your own credit card for the charges.

Mailroom Services

The ISR Mailroom is located in the basement of the ISR Thompson building. They provide several services including mail pickup and delivery, messenger services, and mail supplies (boxes, UPS and express mail envelopes and blank waybills, etc.). The messenger makes 2 trips daily to all campus locations for delivery and pickup of time sensitive materials. An online messenger request form must be filled out. Messenger requests can be made online through the ISR Intranet page (ISR-Center for Institute Services –Online Request for Services [Messenger Services]).

The mailroom may also be contacted to assist with moving furniture, such as desks or filing cabinets as well as conference room set-ups.

Party Fund

The HRS program has an established “party fund” to support staff social activities and special occasions such as staff birthdays, staff welcomes and farewells, and the sending of flowers and cards for life transitions (weddings, graduations, babies, family bereavement, long-term or serious illnesses, etc). These activities cannot be paid for by other funds, in contrast to staff meetings with speakers or the large staff events such as the summer picnic and winter party, which are not paid for by the staff party fund. Maintaining a fund eliminates the need to constantly request contributions for each individual staff event.

Participation in the party fund is strictly voluntary, but it should be noted that this is one of the ways we share in creating a sense of community in the workplace. The suggested contribution from each staff member is calculated to be .05% of your yearly salary (i.e., your salary multiplied by .0005, or your annual salary in thousands divided by two), to be renewed each calendar year (Jan 1).

PEERRS Certification

HRS staff members must complete the University of Michigan PEERRS (<http://my.research.umich.edu/peerrs/>) training on the following modules: Foundations of Good Research Practice and Human Subjects. Other modules are optional. The PEERRS certification meets NIH’s Human Subjects Training certification.

Printers-HRS

Network Printers

Most printers within the HRS area are a network printer, which means you must be logged onto the ISR network in order to be able to print to these. Each of the HRS work bays has a primary printer. Most of the printers are defaulted to run duplex copies. As a courtesy to other

staff members who share these printers, please promptly pick up your printout and refill the paper trays as needed.

The HRS color printer should be used judiciously, as the printer cartridges are quite expensive. If your work requires you to print in color frequently and you do not have a local color printer, let the HRS Computing Group know. If there is sufficient justification, there may be a more cost effective option than using the network color printer.

Printer Paper

A small supply of paper for each printer is located in each bay. A larger supply of printer paper is in bay 3050. If you notice that this supply is running low (less than 3 reams) please let Joyce Sisung know for printers at ISR Thompson, and let Mary Cheatham know for printers at Michigan Square.

Please remember that filling the paper trays is everyone's responsibility. If you are picking up a job and see a 'tray empty' notice on the printer, please fill that tray.

Printer Toner Cartridges

If the toner low message is on, then you should change the cartridge, asking for help from the HRS Admin Team or HRS Computing Group. If needed, inform Joyce Sisung of the need to order new cartridges, and return the empty cartridge for recycling.

Professional Development/Training

Professional development and training opportunities exist and are typically encouraged in the HRS program. All training should be discussed and cleared with your supervisor. In some instances, it may be necessary to obtain HRS Executive Committee approval depending on costs, project needs and other circumstances.

The Survey Research Center provides frequent and useful training. SRC offerings may be found on the SRC Training webpage on the Intranet. In addition, HRD (<http://www.umich.edu/~hrd/>) and ITCS (<http://www.itd.umich.edu/education/>) offer training.

In addition, regular staff may wish to take advantage of the UM Tuition Support Benefit (see the SPG 201.69 for more information).

Purchasing Software, Equipment, Supplies or Services

General Supplies

General office supplies can be found in the first cabinet to the left upon entering the 3050 bay at ISR Thompson, and in the cabinets under the mailboxes and printers at Michigan Square. If you notice an item becoming low, notify Joyce Sisung at Thompson or Mary Cheatham at Michigan Square; she will restock the cabinet. All supply requests should go through Joyce or Mary.

If supplies are for **projects other than the Health and Retirement Study**, please let Joyce or Mary know what project/grant should be charged for replacement items.

Special Requests

If a task requires a large quantity of a particular supply (e.g., mailing envelopes, labels, etc.) please inform Joyce Sisung at least 5 working days in advance so that necessary arrangements can be made to get the supplies in time.

Standard procedure for purchasing non-general office supplies or a service:

- (1) Determine need to purchase item, obtain supervisor approval.
(Note: If the item is computer-related, request a cost estimate and specifics from SRC Computing or via the web)
- (2) See Cathy Liebowitz, Carol Bowen, Aneesa Buageila or Lekisha Maxwell to determine if your request can be supported from a project budget. Please provide the timing required for the purchase (i.e. needed by next week, special limited offers, etc.)
- (3) If cost is > \$100, the staff member should see Cathy Liebowitz to obtain approval to purchase **IF** the budget can support the purchase. Computer related requests (hardware and software) should be forwarded to the HRS Computing Group. They will review the request and forward to the HRS Executive Committee, as necessary.
- (4) If cost is < \$100 see Carol Bowen, Aneesa Buageila, or Lekisha Maxwell. For smaller expenses, a member of the Admin Support Team can use the U of M Purchase Card (PCard) to order the item directly from the supplier. If purchase is approved and over \$5,000, AST completes an on-line purchase order. You will be asked to provide sole source justification, or the procurement transaction will need to be processed for bidding. Please supply supporting documentation (order form, specifics to the product/service) including a justification for completing the purchasing requisition.

Please be aware that the University of Michigan purchasing **requires** a specific process before items or services can be purchased.

- (5) UM Purchasing reviews the PO for completeness and issues the PO which is sent out to the vendor. Item(s) are sent.

Recycling

We make an effort to be as green as we can, and so we recycle as much as possible. The rule here is if you can rip it, you can recycle it. We are on single-stream recycling, which means that in addition to paper, plastics can also be added to the recycling bins. Individual bins should be available at each work location. Larger bins are located in each bay, and in the common area near the elevators of Wing I. Recycle bins are placed throughout Michigan Square.

Reference Materials

Data Resources

Questionnaires and codebooks are available via the HRS website

Libraries

The Population Studies Center Library is located on the first floor of ISR. More information can be found at <http://www.psc.isr.umich.edu/dis/infoserv/>

Reporting Absences

Staff should notify their supervisor prior to the beginning of shift of inability to work (SPG 201.11). A supervisor may request a physician's statement.

Shredding

We often work with confidential data. Any hardcopies that are no longer needed should be shredded. In the telephone closet, next to the floor copier, there is a shredding drop box. Any paper shredding may be deposited here. For Michigan Square, the confidential shredding container is located near the mailboxes.

Near the printers outside of the HRS conference room is a small shredder for managing the appropriate destruction of data disks and credit cards. Likewise at Michigan Square, there is a small shredder near the recycling and trash bins next to the mailboxes.

Staff Meetings

All-HRS staff meetings are scheduled periodically. All regular staff members are expected to attend.

Additionally, many individual work teams have standing meetings. Please check with your supervisor or the team leader for more information about these meetings.

Standard Voice Greeting

In-coming phone calls are answered as follows:

“Health and Retirement Study” OR “Economic Behavior Program” Optional: This is [NAME]

Telephone Directories

Online Directories can be found at:

ISR Staff Directory <http://compute.isr.umich.edu/directory/default.aspx>

MCommunity <https://mcommunity.umich.edu/>

UM & Ann Arbor Phone Books

Each fall the University distributes updated UM phone directories. Additional copies of the UM directory can be obtained from ISR Personnel. Ann Arbor phone books are also distributed each fall to the area. Usually a message is sent out to staff to retrieve a copy for their workspace. Additionally, the AST obtains copies of the UM & Ann Arbor phone directory for the temporary workspaces.

Water Cooler

There is a water cooler which dispenses hot or cold water across from the HRS conference room (3038 ISR), and one in the Breakroom (room 4113) at Michigan Square. A new supply of

water is delivered by Arbor Springs weekly. If the dispenser is empty, please refill it, or ask for help in refilling it. Please do not leave the dispenser empty.

Voicemail

ISR uses UM ITCS voicemail. Most phone lines have voicemail enabled. Dial 615-4242 to retrieve messages. If your line does not have voicemail, please consult with your supervisor. If approved, supervisor will forward request to C. Liebowitz, who will process through SRC Facilities.