Budget Manager’s Meeting Notes
August 16, 2018 (blue type indicates comments added during meeting)
UCC 3rd Floor Conference Room

1. **Introductions** (standard item)

2. **Report from Controller’s Office** –

Lisa Kunkler will discuss Agency Accounts in September. Liz added that starting in FY19, MRR budgets will now be in fund 50000 per a BOR change.

3. **Report from Human Resources** – Lindsay Sneddon and Tracy Williams

HR is here to answer any general HR questions that may come up.

4. **HCM Updates – Cole Stratton**

   a) **Reports To Data – Cole Stratton**

Supervisors (Reports To) of positions are based on the organizational structure of a department, unit, or division. Unless a reorganization is occurring, there is little need for a Supervisor change to occur. In OneUSG Connect (our new Payroll, Position Management, and Human Resource system), the Supervisor (Reports To) information is tied to a position and not an individual. The advantage of this approach is that changes do not need to be made to this data element when the positions become vacant. By design OneUSG Connect routes the approvals to the next “one up” or the supervisor next in line.

Also, we are reviewing options for improving the efficiency of updating the Reports To data field on the position and how that data element is impacting our ePAR/PAR processing. Since the Reports To field is considered a position attribute in OneUSG and is controlled by a position number not a person’s name, we are working on removing it from the Change section (bottom) of the ePAR and moving it to the Position Data (top) section. This means you would not be able to change the reports to using an ePAR and an erroneous name would not show when the employee that was a Reports To is gone. The advantage of this is reviewing the Reports To would not be a “stopping point” in the Budget Office review and initiators of the ePAR could see who it was and submit a change form if needed.

For ePAR processing, if the ‘Reports To’ position is vacant, leave the field blank and note the Time Approver (name and employee ID) in the ePAR summary and comments.

ePARs will be processed ‘as is’ in terms of the Reports To position. Whatever the Reports To position is in OneUSG at the time of processing will remain. To update this, please submit a Supervisor/Approver Change Request form effective the next payroll cycle.
b) **Time Approver Changes – Cole Stratton**

Time Approvers are responsible for approving leave requests in addition to hourly employee time cards. Unlike Supervisors, Time Approvers are tied to a person not the position. When a Time Approver leaves the university, a new Time Approver needs to be designated. When either or both of these data elements change, a Supervisor/Time Approver Change form needs to be submitted to the Office of Budget Services.

We are reviewing options to improve the efficiency of updating the Time Approver field on a person’s job with HR and Payroll as well. The options we will be presenting are using the Time Approver change request and delegation features of MSS (Manager Self Service) as well as adding a time approver field to the bottom of the ePAR. We will follow up once that decision has been made.

Additional guidance for completing the form for either of these two data fields is posted to our website at: [https://www.westga.edu/administration/business-and-finance/budget/budget-management-tools.php](https://www.westga.edu/administration/business-and-finance/budget/budget-management-tools.php) under “OneUSG Connect.”

Please start adding the Time Approver (Employee name and ID) to all multi-incumbent PARs/ePARs.

5. **FY19 Position Tracking Sheets – Kristin Smith**

As of last week, all FY19 Position Tracking Sheets should have been sent out to all areas. If you do not think you have received a sheet for your area or would like someone to walk you through this form, please let your analyst know.

6. **Customer Service Survey – Kristin Smith**

We are looking at adjusting the questions on the survey to provide an opportunity for more specific input. Additionally, links to the survey have been added to each analysts’ email signature. Please take just a few minutes to complete this survey. The survey is anonymous and we will be reviewing the results quarterly to guide office improvements. Also, we are looking into providing answers and/or updates for the items mentioned in the survey on our website.

7. **Budget Adjustment for Extra Day in FY2019 – Cole Stratton**

We require every full-time hourly position to be budgeted for 2088 hours. In the 7 year calendar cycle, we normally have 5 years that are 2088 hours and 2 that are 2080 hours. About every 10 to 15 years we have 2096 hours. Because the university funds the extra day for the 2096, we temporarily take back the one day in a year that is 2080 hours for E&G funded positions. Our current fiscal year has 2080 hours.

A Budget Amendment is being prepared by Budget to remove the additional 8 hours of budget from funds 10000/10500 and Institutional 10600 funds. The BA backup will be emailed to the budget managers.

8. **FY2020 Budget Request – Liz Baker**

About two weeks ago, the templates for the FY2020 budget request were distributed to PAC. Liz Baker will email the templates to the Budget Managers today. Please note the fringe rates should be set at
25% for FICA and retirement plus $7,700 for health insurance. If you are using a template that contains a different rate, please adjust your formula or transfer your data to the new templates. The deadlines for when each group is to prepare their portion of the requests are:

- August 1 - August 31, 2018: Departments, Centers and Units
- September 1 - September 15, 2018: Colleges and Major Units (Deans/Directors)
- September 16 - September 30, 2018: Divisions (Vice Presidents)
- October 1 - October 15, 2018: Institutional (President/VPs)

Please submit your templates to the Budget Office no later than September 30. Liz will aggregate the data for the Vice President’s discussions the following 2 weeks.

Additionally, UWG was one of just a few schools asked to submit an “Enhancement Funding” request for FY2020 up to $500,000. It has been several years since the Governor’s Office has allowed our system to request this type of funding. The decision was made to focus on Student Success by enhancing our Momentum Year, Adult Learner services, Advising efforts, and Student Safety. The New Funding requests mentioned above is how we would spend our formula allocation.

9. **Salary Rounding for Monthly Positions – Kristin Smith**

As you are all aware by now, our monthly staff and faculty salaries need to be evenly divisible by the number of payrolls for that pay group. We have now received confirmation that this same logic will apply to our monthly PT Faculty, Graduate Assistant, and monthly Student Assistant salaries as well. The salary for these employee groups will all need to be evenly divisible by the number of pay periods in the semester or annually for some of our monthly SAs. For GAs and PT Faculty, we have 5 payrolls in the fall so the salaries for these employee types should be evenly divisible by 5. The spring usually has 4 payrolls, however, that needs to be confirmed by payroll. The Budget Office will be reviewing PARs for rounded salaries in these pay groups and request additional budget funding if needed. HR will adjust the PAR salary if needed in order to process the PAR. If any PARs were processed with unrounded salaries before this salary confirmation was received, you do not need to submit change paperwork to correct that salary.

10. **Federal Work Study Process Changes**

Wednesday, August 1, the Budget Office met with Carla Powers and Jo Etta Miller to discuss changing the Reports To process for FWS positions. The result of the meeting is that Carla Power’s position (10045556) will now be the Reports To supervisor for all FWS position. We will continue to have one position for each home department that receives a FWS award. Departments can still initiate ePARs and should provide information on the ePAR to designate the appropriate time approver (that should not be Carla Powers).

The Budget Office changed the Reports To all the positions, inactivated multiple positions for a single department if it had not been filled, and sent the following email to Budget Managers and department contacts on August 3:
Hi Everyone,

Earlier this week our office met with Financial Aid to discuss the managing of positions for the Federal Work Study (FWS) allocation. In an effort to reduce the confusion with the allocation of the FWS dollars and the number of positions that we have for the FWS program we have decided that the Reports To Supervisor for all FWS positions will be Carla Powers’ position going forward. The time approvers will be out in the departments. The hiring decisions for the FWS students will still be made at the department level and the ePAR work flow will remain the same. The impacts of this change to you as a department are listed below:

- You will now only have one FWS position per home department. We have attached a list of the single FWS position you will use going forward for each Home Department. We have two departments that had ePARs in process for two separate positions so we will keep both of those positions until the end of the semester. Those positions have been highlighted on the attached sheet and both positions will have 10045556 as the Reports To position number.
- The Reports To Supervisor position that you need to use on your ePARs will be 10045556 (Carla Powers).
- For each FWS hire ePAR you submit, please provide the name and Employee ID of the Time Approver supervisor for your student in the PAR Summary section. We can have multiple Time Approvers for the same position number. This is important to remember as the Time Approver will default to Carla if another name is not indicated on the ePAR.
- During the year, should you need to change the time approver for an active student please submit a Supervisor/Approver Change Request Form. You only need to complete the Update Timecard Approver section of the form as the Reports To will remain Carla Powers’ position listed above.
- You will only need a new FWS position number if allocation is given to a department that does not currently have a position number.
- We have attached the FY19 FWS Allocation sheet with the updated position numbers and home departments for ease of use.

Our office will work with HR to refresh the positions of students who have already been hired into FWS positions for the fall that had the old Reports To supervisor listed. Additionally, if you have an ePAR in progress with the incorrect Reports To supervisor listed we will simply add a comment to note the new Reports To position so as not to delay the processing of that hire.

11. Hiring Retirees as PT Faculty

Last month we discussed the new process for hiring retirees in PT faculty positions. We need to clarify that a new position number is needed (due to the use of a different job code) for West Georgia retirees only. It does not apply if they retired from another USG institution.

Roundtable

Jill Drake is now the new Associate Vice President for Academic Affairs.

Per Data Management, not all summer termination rows have been added to Student Assistants because of the large amount of August paperwork coming through.
The Assistant Vice President of Human Resources/Chief Human Resources Officer position will be filled by Christina Brogdon effective September 5, 2018.