Budget Manager's Meeting Notes

July 19, 2018 (blue type indicates comments added during meeting)
UCC 3rd Floor Conference Room

1. Introductions (standard item)

Jackson Johnson – Budget Analyst Intermediate, Office of Budget Services
Jackson will work with budgets in the following areas:

- Facilities
- College of Art & Humanities (COAH)
- College of Science & Math (COSM)
- Library
- Federal Work Study Program

Please keep in mind that Jackson may not be processing all of your paperwork at this time so you may still hear from Daron and Matt on benefitted issues. Also, while he is training, Jackson may process paperwork for other departments as well.

2. Report from Controller's Office – *Lisa Elliot, Jennie Ingram & Angela Rowell*

a) Reconciliation of Budgets (watching for Open PO's)

- Status in "Managing Requisitions" will change to "Created"
- Cycles work at 2 hour time intervals (8, 10, 12, 2, 4)
- You can edit until the status changes to "PO Created" (edit quantities, amounts, shipping lines) except marketplace orders. You cannot change anything from the marketplace after issuing a requisition.
- PO Created assigns the number, and then it dispatches once Purchasing approves, checks budget, and signs it and it's ready to go to the vendor.
- After PO has been dispatched and marked as "Received" AP can pay it.
- If you see something as "Received" and it hasn't been paid out, get an invoice from the supplier and get it to AP to get it paid and close out the end of the year.
- If you don't disencumber before the year end: 10000, 10500, and 10600 funds goes back to the state, other funds goes into university reserves.

b) Hiring of Consultants (UWG employees and non-employees)

A consultant that is already a UWG employee needs to be paid in a different way than external consultants, talk to HR to get them paid. Please try to avoid this.

c) Food Purchases with State funds

Do not buy food in the marketplace. You must have a food form and prior approvals to purchase it, but you cannot attain these in the Marketplace. We can't turn the food options off in the Marketplace at this time.

PO for food will need food forms completed by Rhonda McCrary before creating a PO. If you order before getting a food form filled out, AP will not pay the invoice due to state funds regulations. Dine West is internal billing which does not fall under this rule.

d) Personal Packages

Central stores is no longer delivering personal packages to departments if they arrive to the warehouse. State funded employees cannot deliver personal packages. You will have to come pick it up at the warehouse.

e) P-Card Common Issues

- Sales tax is still being charged to P cards. If it is going to be charged on the billing cycle for which you are reconciling, it can be taken care of. If it is charged in a different cycle, documentation will be needed. Sales tax should be removed within 30 days.
- Split transactions are being continuously audited by the state. Do a PO if possible. Many of the instances being audited are when you are charging to the same vendor during the same billing cycles or when you are charging the same vendor in consecutive cycles. Leave lots documentation explaining the circumstances. For example: “Conference could only accept single registration”. Same with Amazon, need to see documentation that you’ve checked state contracts to support your purchase. You will be issued a minor violation for buying outside of state contracts without proper exception.
- There will be a blue button bottom portion of the screen that say Sign Off to click to complete signing off on Works transactions.
- Looking to add training on Develop West for DOAS.
- Develop West training is available for fuel cards. Completion certificates go to Jennie and she signs off on the fuel card agreement to be issued a pin. Let Jennie Ingram know when you have students no longer working so we know when to shut off a pin.

f) Scanning invoices into requisitions:

AP does not receive invoices scanned into requisitions.Please continue to submit paper copies.

g) Changing the Check Request Form:

Adding a line to print approver’s name

3. Report from Human Resources – *various*

a) Payroll Distribution Reports – *Lisa Kunkler*

These reports are now ran by Payroll. Departments cannot run these themselves due to the security settings in OneUSG. The access to Payroll Distribution reports is given to budget managers only. Budget Managers can work with their departments to give them what they need for reconciliations. We are working on coming up with a way to pull these reports by the Home Department ID. They are being sent out now. The goal is to send it out right after the end of each month; if you need it on a biweekly basis, contact Lisa Kunkler.

b) New PeopleAdmin Landing Page – *Alicia Hargraves*

- UWG Human Resources is pleased to announce that updates to the PeopleAdmin landing page are live as of this morning. The new landing page features a more modern appearance, easy to use navigation, at-a-glance data visualizations, and configurable shortcuts. All users will receive a brief 7-step walkthrough outlining the new features after logging into PeopleAdmin for the first time after the update. The outline is also attached for your reference.

    - Users don’t have to switch between user roles to see specific action items. When you log in as employee you get all action items assigned to you, and see watch list. If you are in charge of multiple departments, you can filter by departments.
    - Applicant tracking is “Hire”, position management is “position”
- Along with the updated landing page, this update features an internal job board! Current UWG employees who wish to apply for a position on campus can now access the internal job board using their UWG ID.
    - Performance evaluations will follow employees in the system as they move to different jobs around campus.
- To access the internal job board:
    - Navigate to jobs.westga.edu and click on ‘Log In’ on the left hand side of the screen.
    - On the login page, there is a link that says ‘Current employees select this link to login’. Users will be prompted to sign in using their UWG ID.
    - Once logged in, a ‘Search Internal Jobs’ option will be available. If a job is posted internally, it will not be visible on the external job board going forward. You will have to log in using your UWG ID to access these postings.
- **We HIGHLY encourage employees to log in using this method when applying for non-internal jobs to avoid duplicate user profiles and to ensure that we associate previous performance reviews with the correct user profile.** Please contact your HR Business Partner if you have any questions or concerns regarding these updates.

c) In-Range Salary Adjustments – *Sandra Huey*

Last week the email below was sent out from Tracy Williams in HR regarding the deadlines for the October 2018 in-range adjustment and reclassification requests. The first step to making an adjustment is to contact your HR Business Partner to determine which kind of adjustment is needed.

- The deadline for submitting in-range adjustments and reclassification requests with an effective date in October 2018 is July 31, 2018. The quarterly processing does not apply to requests to fill a vacant position.
- As a reminder, a **Reclassification** of a current incumbent is the process of re-evaluating the Classification Title, FLSA code, BCAT code and/or Pay Grade designations **based on a significant change in job duties or market conditions**. An **In-Range Adjustment** is a pay adjustment that changes an individual employee’s pay rate while remaining within the pay grade associated with the position. The scope of work, volume of work, duties and responsibilities have changed enough that may warrant a salary adjustment without a change in classification. Work with your HR Business Partner to make these determinations. The first action step is to update the job description in People Admin.
- **Reclassifications and in-range adjustments are not awarded in lieu of merit.** A change in the work performed by the employee must be present to consider either a reclassification or in-range adjustment.
- Also, please note that **Retention** pay, under the new BOR policy, is defined as an adjustment in pay level intended to retain an employee who is at risk of vacating the position due to disparity in current and potential earnings outside of the organization. Proof of the offer must be presented.
- For more information, please review the Board of Regents Salary Administration Policy presentation on the UWG HR webpage.

d) Pay Check Access for Terminated Employees – *Kristin Smith*

We received confirmation from Shared Services that once an employee is terminated from OneUSG, they cannot access their pay checks. They have to call Shared Services or submit a ticket to request a copy. The same is true for W-2's: if they have opted for an electronic copy, they will not be mailed a copy and will not have access to retrieve the electronic version on their own. Employees who have already left must call Shared Services to get a mailed copy. Employees should change to a mailed copy before leaving and should print their final checks. This is the most current information and could change before tax time.

e) Changes to hiring retirees – *Kristin Smith*

If you are hiring a retiree into a non-benefitted position, you will now need to create a new position number. This is because different job dynamics will be needed in HCM to ensure that Alight does not offer benefits to that employee. Please submit a BA creating that new position prior to the ePAR/PAR that you submit. Otherwise you won't have the correct position number. For departments that consistently hire retirees, we can go ahead and set that position up with a BA. You cannot have a retiree and a non-retiree in the same position, and you must create a new one when hiring a retiree.

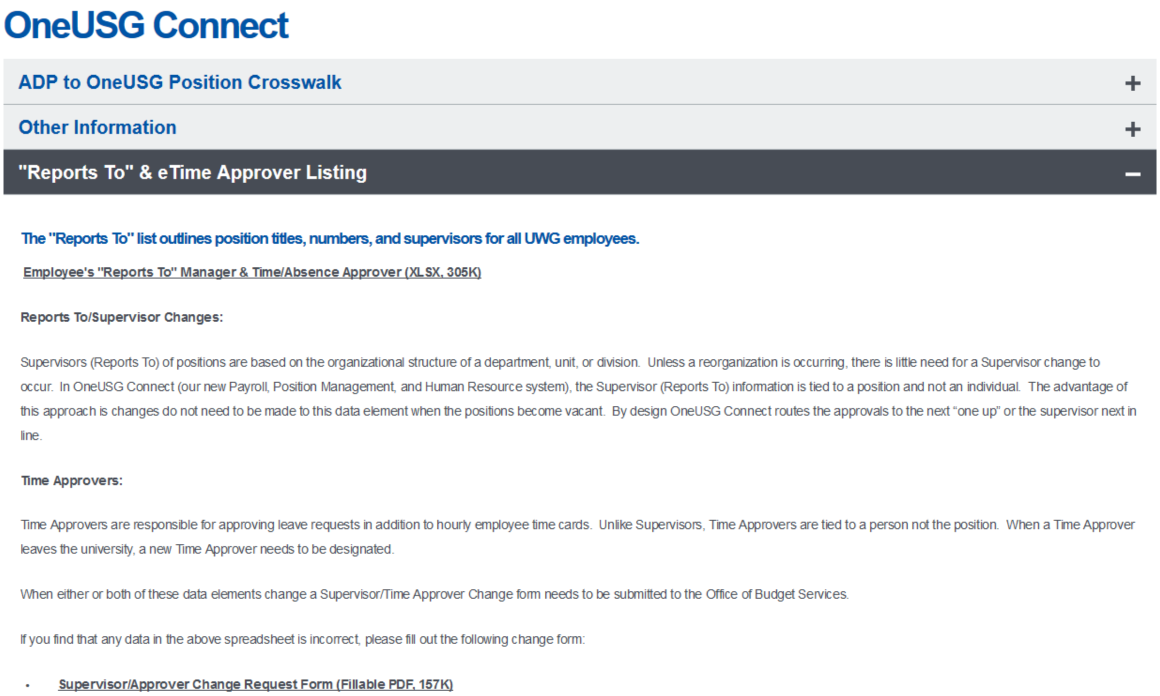
f) Changes to GA workflow – *Kristin Smith*

The Budget Office will not be reviewing GA PARs that are for tuition waivers only (not receiving stipend pay) effective Fall 2018. After all other signatures are obtained the PAR will be forwarded to HR to the data management team. They will be scanning them into Fortis for documentation purposes only and will not enter them in OneUSG. GA PARs that include any salary will still go through the Budget Office.

4. HCM Updates – *Cole Stratton*

a) Reports To and Time Approver Listing – *Cole Stratton*

- Due to some unanticipated data change impacts in OneUSG Connect, the Office of Budget Services will continue to update the list of "Reports To" managers and "Time Approvers" on our website. This will occur every Monday.
- Another useful bit of information that is included in the "Reports To" report is the Employee Record #. For students with two jobs, this may be critical information that managers need to provide their student workers so they can differentiate on which time card they are to log their time. The Employee Record # is the only data element that distinguishes different jobs on the time card/punch clock. The report may be viewed under the Budget Management Tools > OneUSG Connect section of our website:



OneUSG Connect

ADP to OneUSG Position Crosswalk +

Other Information +

"Reports To" & eTime Approver Listing –

The "Reports To" list outlines position titles, numbers, and supervisors for all UWG employees.

Employee's "Reports To" Manager & Time/Absence Approver (XLSX, 305K)

Reports To/Supervisor Changes:

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 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.

Time Approvers:

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.

If you find that any data in the above spreadsheet is incorrect, please fill out the following change form:

- Supervisor/Approver Change Request Form (Fillable PDF, 157K)

b) Time Approver Changes – *Cole Stratton*

We have discovered that when some data elements are changed on a position or a person's job record the Time Approver may revert to the "Reports To" name. We are working on implementing business practices that will minimize this occurrence. Although this will minimize the occurrence significantly, it will not completely prevent the error from ever occurring. As we all know hiccups happen. Kristin will follow up with an instructional email and information on more formal training will come in August.

5. Student Assistant Terminations – *Kristin Smith*

All student assistants will be auto termed on July 28th. You will need to submit an ePAR for any new hires or rehires for the fall semester. The earliest effective date for fall hires is July 29th.

6. FY19 Position Tracking Sheets – *Kristin Smith*

Our office is creating the FY19 position tracking sheets this month. We will be mailing out the final sheets to budget managers by the first week in August. These will be updated with BAs received up to that point.

Roundtable

- Budget will be sending a customer service survey when it is finalized.
- Budget will start keeping track of department budget contacts internally. More information may be requested on the Budget Managers at a later date.
- The Campus Center will be closed Thursday, July 26 for graduation and remain closed until August 6th for maintenance.
- Housing is seeking faculty and staff support for move-in week.