1. **Introductions (standard item)**

Paula Kepes is the new Director of Employment Services  
New Senior Budget Analysts – Cole Stratton and Scott Puckett

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

A. Financial Assurance forms are due to the Controller’s Office by  
B. Travel Office - Lisa O’Neal  
   - Paperless Pilot for expense validations – will be rolled out to a few areas at first.

3. **Report from Human Resources – Alicia Hargraves**

A. Part Time Faculty positions:  
   - Part Time Faculty PAR process for FY18 will remain the same as the process established in FY17. No change was made in this process after discussions between HR and Budget Services found that different positions are still needed for Temporary and Regular Part Time Faculty.  
   - Different position numbers are needed for both Temporary and Regular Part Time Faculty. The title is the only way to distinguish between the two types of PT Faculty in ADP. Since you cannot have multiple titles or for a single position in ADP, two different position numbers are needed. Additionally, limitations in ADP will not allow us to use other position dynamics to distinguish the differences in these positions.  
   - Different ADP position titles are needed for ACA tracking, HR pulls the position title data from ADP to aid in the required reporting for ACA compliance.  
   - Defining the difference in the PT Faculty positions:  
     - Temporary  
     - Regular  
   - Before a PT faculty is hired, the department needs to understand if the position is temporary or regular. If you are unsure, speak with your HR Business Partner before processing. This will reduce delays and reworking transactions.  
   - Once HR reviews a PT Faculty PAR, the PAR is then sent to Budget for further processing,  
     - Budget confirms if the HR notes that the PT Faculty hire is Regular or Temporary.  
     - Budget checks to ensure the position number matches with the PT Faculty designation (Temporary or Regular) in the ADP title. If it does not match, Budget will reject the PAR with comments.  
   - If a new PT Faculty position is needed based on the Temporary or Regular designation, Budget can create that position with a BA submitted to our office. Please note if the title should be Regular or Temporary on the BA.
B. New Orientation Program & New Employee Start Dates

With the implementation of UWG’s new orientation program their will be a change in the hire dates for new employees beginning September 1. The following email from Juanita Hicks sent 8/3/2017 @4:27pm:

*I am excited to announce the Fall 2017 rollout of UWG’s new and improved orientation process effective September 1, 2017. The process has been overhauled to ensure that all of our new, regular employees receive a consistent orientation message that supports UWG’s vision to be the best place to work, learn, and succeed. The new orientation will apply to all newly hired, regular employees with the exception of faculty in the month of August when orientation is offered by the Office of the Provost, temporary employees, and students.

The new employee orientation now includes two-days of events: Work West and Wolf Life.

- **Day one, or Work West**, will take place on the employee’s start date. During Work West employees will review key policies and concepts pertaining to Human Resources, diversity and inclusion, and mandated training.
- **Day two, Wolf Life**, will take place at the end of each semester. Wolf Life is oriented towards engagement and building connections, and delving deeper into diversity and inclusion, Title IX, and conflict resolution.

In order for the process to be successful, the start date for new, regular employees will need to be the first day of a pay cycle and has to be approved by the Office of Human Resources. This change in our campus culture is necessitated by not only the onboarding process but also by OneUSG. This change for biweekly employees will begin in September. Monthly employees will be able to continue starting the first day of the month through the 15th of the month through November 2017. We will begin structured hire dates for monthly employees in December.

Divisions and departments that already have their own orientation programs in place are encouraged to continue them; however, it’s recommended that the agenda for divisional orientations be compared to the topics reviewed during Work West and Wolf Life. A brief overview of the schedule is attached for your convenience.

UWG’s new onboarding process is the result of a cross-functional effort between the Offices of Human Resources, the Center for Teaching and Learning, the Center for Diversity and Inclusion, and the Center for Business Excellence. My heartfelt thanks go out to all of the committee members for all of their hard work and efforts in this undertaking. I hope that you, too, are excited about welcoming a new, orientation process that encompasses the USG requirements for new hires while also providing a consistent message on the global expectations of the University of West Georgia and what is necessary to become the best place to work, learn, and succeed.

4. **FY2018 Faculty Contracts**

The budget review of Batches 1-4 of the Faculty Contract templates have been completed by Budget Office. After Batch 4, Budget Services will work directly with the VPAA Office on a weekly basis to process the remaining new and revised faculty contracts.

5. **Position Management Process Summary**

Reclassifications –
- a. Department Manager sends PA request to HR.
- b. HR reviews and will send to Budget Services.
c. Budget Services will verify if position has adequate spending authority; if a budget amendment has been received; and/or if the position if currently filled.
   - If no budget for position, Budget Services will contact department and Budget Manager and make note in PA.
     o Budget Services will hold PA request for 5 days.
     o If no response, send 2nd email notice and note in PA.
     o After 2 weeks return PA to role that initiated. You’ll need to check History tab to determine who initiated to return to correct person/role.
   - If the position is filled, Budget Services does not change ADP at this time.
     o When ePAR is generated will have incorrect attributes.
     o Budget Office changes attributes in ADP when ePAR received.
     o Include in comment section in ePAR what we changed in ADP.

New Positions –
   a. Department should contact HR Classification and Compensation first.
   b. After discussion with HR, department will process PA request.
   c. Simultaneously, department submits budget amendment to Budget Services.
      - When amendment received in Budget Services, check PA.
      - If no PA request, contact HR employment services via email and copy department and Budget Manager.
   d. When Budget Services receives PA notification,
      - If budget amendment received,
        o Set up position in ADP.
        o Add new position number to comments in PA prior to returning to HR.
        o Depending on Division and funding source you may or may not process the budget amendment at this point.
          ▪ For Business & Finance and President’s division move only the amount of salary needed. Create amendment with salary allocated from new funding. Do not process till ePAR received at which time the amount may need to be adjusted.
          ▪ For AA, ITS, SAEM, and UA process budget amendments when submitted.
      - If no amendment received, contact department/Budget Manager.
      - After two weeks of receiving PA request if no amendment, return PA to role of initiator.
   e. When PA request is approved, Budget Services sends back to HR-ES adding position number in comment box and the word “Approved.”

Students – Budget Services does not review PA requests. Will verify budget when ePAR processed. This changed due to security issues in PA.

Double Filling Positions for New Hires–
   a. No PA request needed for temporary position that will be set up.
   b. Department sends in budget amendment to create temporary position number.
   c. Simultaneously, department submits:
      - ePAR moving incumbent into temporary position
      - ePAR hiring replacement
      - ePAR terminating incumbent from temporary position.
   d. Budget Office will process when all paperwork received.
Barrier Committee –
The Barrier Committee is looking into ways of simplifying PA usage. First step is reviewing
instructions to try to better relay the information. Liz is chair of this subcommittee.

6. FY19 Budget Development

Budget development templates will be emailed today (Thursday) to PAC members. The templates
consist of:

A. Needs Request
Send in your budget needs in priority order through each next level of supervision. The System Office
has not provided FY19 Funding Request Templates but we expect very little change. So - please use the
attached FY19 New Funding Request Template (asking to identify the space where any new personnel
will be housed).

It is imperative that the request align to the university's strategic plan and/or the university's CCG
plan. Please provide as detailed a description of the request as possible. For new positions, the template
will calculate fringe costs at 24% of the salaries and add an additional $7,700 for health benefits.
Please be as accurate as you can when determining the level of the position. If the department receives
funding and decides to change the level of the position, the department must fund the difference. If you
are unsure, please reach out to Human Resources. The Budget Office will review the position request
with HR to ensure we are using the correct salary amounts for the positions.

Once the requests are prioritized at the President and VP level, we will follow the same Tier 1 (new
funds), Tier 2 (nominal grad tuition increase), Tier 3 will not be included as there will likely be no
undergraduate tuition increases considered, and Tier 4 (enrollment growth revenue) which will most
likely be the available funds for our commitment to salary equity increases.

B. Savings to Students
In Part II, question 4, of the BOR Budget Hearing Narrative submittal we will be asked what actions our
institution has taken to reduce the cost of education to students - please provide details regarding these
actions, the number of students impacted and the savings to students. Additionally, provide ideas on how
you can be proactive in reducing costs to students for the upcoming year.

C. Strategic Budget Redirection
At each level of the budget prioritization (needs request) process, please consider and document how
your "funding needs" for personnel, programmatic and equipment will be funded by redirecting current
recurring resources via reorganization, redirection of personnel duties, and/or direct fund
redistribution. Please provide specific detail. The UWG Budget Office will be providing a reporting
template for both of these steps in the process.

D. Timeline Summary
- August 1 - August 31, 2017: Departments, Centers and Units prepare requests
- September 1 - September 15, 2017: Colleges and Major Units (Deans/Directors) prioritize
  requests
- September 16 - September 30, 2017: Divisions (Vice Presidents) summarize/prioritize requests
- October 1 - October 15, 2017: Institutional (President/VPs) prioritize summarize requests
- October – December prepare/submit Business Plans
• November – January prepare/submit fee requests for all existing fees and any fee changes. (see fee note below)
• February – April prepare university budget for BOR submittal

In late September early October the budget request will be shared with the Faculty Senate Budget Committee.

We will conduct several information/training sessions as we request information for the FY2019 Budget Development process. Fee requests and business plans for auxiliary units are also considered part of our budget request by the USG.

7. Fee Audit

As stated earlier, our fees are part of our budget submittal to the USG BOR and State of Georgia. As a result of the changes in fee policy this past year, UWG’s internal audit group is reviewing all our fees and charges this fall which will include all revenue earned by academic departments. One area that will be revenue to ensure the revenue should not be treated/coded as a “fee” are our Departmental Charges. This is not reported in Banner as a Fee.

Because of the amount of data that needs to be reviewed and the close coordination to data reporting for our budget request, the Office of Budget Services will assist the auditors in their review.

8. Extra Compensation Forms

The Office of Budget Services would like to remind everyone that Payroll has 3 types of extra compensation forms depending on the employee type for the person’s base job: Faculty, Administrative, and Student. If an employee is hired as a student and is receiving extra compensation, please use the Student Compensation form not the Administrative form.

Second, the earnings code assigned to the transaction by Payroll dictates the account code in which the budget needs to exists. Here’s a quick summary of the earnings codes and when they are applied.

**REG** - will be used on:

a. Faculty Contract Amendments (making the payment subject to FICA (7.65%) & retirement contributions); Account Code = the same account code as the person’s base salary.

b. Temporary non-benefitted staff. Use a Temporary Administrative Contract Amendment. Medicare portion of FICA assessed at 1.45%. Account code = the same account code as the person’s base salary.

c. Students. Use a Student Compensation Request. Includes all student types with no deductions. Account code = the same account code as the person’s base salary.

**EXS** - will be used for administrative exempt and regular biweekly non-exempt when the pay is for work outside the full-time job position description or outside their base contract period. FICA (7.65%) is assessed against the earnings. Account Code = 526150

If the work is the same as their base job description and inside their contract period than for:

a. Administrative exempt – not eligible

b. Regular biweekly non-exempt – will be pay as OT on biweekly paycheck. There are a few exceptions to this.
**AWD** - will be used when the payment is described as an award; FICA (7.65%) is assessed against the earnings. Account Code = 561400

**OVT** - hourly employees will be paid out of in the home department when overtime is approved in advance and earned; FICA (7.65%) is assessed against the earnings. Account Code = 522805

You may access the forms on Payroll’s website at:

[https://www.westga.edu/hr/index.php](https://www.westga.edu/hr/index.php)

Under “HR Tools” on the gray bar, go to “Forms.”

Then select “Payroll.”

9. **OneUSG Data Cleanup**

As we plan for converting from ADP to PeopleSoft for Payroll and Human Capital Management we are reviewing all coding in ADP. There are some consistencies between what appears on the Position Management screens maintained by Budget Services and the Job Data screens managed by Payroll as well as showing managers of positions/people who are no longer employed at the university. We need you to assist us by:

a. Review the “Positions with Inactive ‘Reports To’” report and please provide an active “Reports To” for the person.

b. Review the “ADP Job Data VS Position Data Differences” report and identify the correct answer for the columns labeled “Stnd Hrs” and “Department ID.” The other fields will be corrected between HR and Budget.
10. **Salary Administration Duties Transition**

Human Resources will now be handling all aspects of UWG’s salary administration including calculation of increases, administering the salary templates, reviewing for compliance, etc. Basically everything except for distributing the funding. Budget Services will still work closely with HR in this task.

Karen Hulsey will move to Human Resources effective September 1 to administer these duties along with ePAR administration and data analysis that was provided by Vickey Pollard who retired this summer.

**Roundtable**