

## Budget Manager's Meeting

April 18, 2013

3:00 pm, Aycock Hall, 2<sup>nd</sup> Floor Conference Room

### 1. EXCEL Review (standard item)

A separate training session on PIVOT tables in Excel is scheduled for May 9 at 1:30 pm in the 2<sup>nd</sup> floor conference room of Aycock Hall. The new summer faculty salary reporting template will be used as the training example. A pivot table will be used to summarize the data.

### 2. Introductions (standard item)

### 3. Report from the Controller's Office – *Randy Miller & Shelly Parker*

Reviewed FY13 year-end processing dates. Check Controller's website for deadline dates.

- June 12 is a major cutoff.
- No more travel advances after May 31
- Check encumbrance report on Purchasing website and let them know if will not need the dollars encumbered. This may provide you additional spending authority.
- Purchasing is requesting list of names of individuals who will be ordering from June 13 & 14, than again June 19-21. Special access will need to be given.

### 4. Report from Human Resources/Payroll - *Juanita Hicks*

Beginning May 1, will start posting positions at the new Mercer rates.

### 5. FY2014 Budget Development – *Kristin Smith*

- a. Salary Equity Adjustments and Promotions included in FY14 budgets.
  - HR will prepare list of all hires from March 1 to end of April and notify departments to submit PARs
  - PARs needed for title changes or adjustments to amounts in Budget Development.
  - Added funding for vacant staff positions based on equity changes provided by HR. VPs will fund when positions are filled.
- b. All new funding will be budgeted in VP's budgets.
- c. Budget due to BOR May 3.
- d. Updated worksheets will be distributed between June 1 and 15. (*In May budget staff will focus on salary equity implementation, summer 2013 faculty templates, FY14 faculty contracts, additional reporting templates for the BOR, and year end balancing.*)

### 6. FY13 Salary Equity Implementation – *Liz Baker*

Mercer Adjustments:

- a. Hourly employees' increase effective May 1 and will first appear on the 2<sup>nd</sup> biweekly paycheck (May 17).
- b. Monthly employees' increase effective May 1 and will appear on May paycheck.
- c. Funding assumed to be within departments.

- d. Summary of adjustments will be sent to Vice Presidents.
- e. Please prepare budget amendments to cover any anticipated deficits including additional fringe.
- f. Any adjustments to positions after April 12 will be processed with a PAR and budget amendment from the department.

**Sibson Adjustments:**

- a. Promotion increases included with equity adjustments.
- b. Effective May 1 and will be on the May 15<sup>th</sup> paycheck.
- c. Will receive pay adjustment for 3contract days in May at the rate of 1.7% (3/173) of annual adjustment rounded to whole dollars.
- d. Summer session pay based on May 1 rates.
- e. Any adjustments to positions after April 12 will be processed with a PAR and budget amendment.
- f. Separate study in process for academic administrators through the Provost's office on April 30.

**Roundtable:**

- Commencement April 27 – need volunteers; next Friday will offer training for volunteers.
- Next week Stephanie G, Jo Etta, and Alex will be out of the office at a conference.
- Save the date! June 26 open house for new nursing building.

**Academic Affairs:**

**1. Summer Faculty Process – see appendix**

Reviewed process.

**2. FY14 Faculty Contracts – see website**

- Contract deadlines on Budget Services website under “Budget Calendars.”  
<http://www.westga.edu/budget/>
- Need to issue summer contracts for FT faculty working during the summer since their regular term contract ends June 1, 2013 per HR. Once signed send to Alicia Hargraves in the Provost Office.

# Appendix 1: Processing Teaching/Research Faculty Hire Paperwork For Summer 2013

Several improvements have been requested in the process for hiring faculty during the summer. The concerns expressed by constituents involved include:

## Academic Affairs:

- Needs to know the total salary earned during the summer for regular academic term full-time faculty
- Wants a simpler process with all salaries earned on one report
- Minimize the use of PARs
- Office of Sponsored Programs needs to approve any salaries paid from grant funds.

## Budget Services:

- Need to validate sufficient budget authority exist prior to hiring employees.

## Payroll:

- Needs to know if faculty being hired:
  - Is currently employed at UWG as full-time faculty
  - Worked for UWG as a part-time faculty
  - Currently employed as full-time faculty at another institution
  - Which distribution code/earnings code to use for payroll processing
- Process improvements for submitting changes after initial data provided

## Procedure:

An Excel template will be completed by departments that includes all faculty hired in a teaching or research position during the summer. The template will replace PARs used in previous years for current employees.

1. The Excel template will be prepared by Budget Services and posted on our website.
2. Each college will submit one file for each session. Each file will have 5 tabs/templates – current FT faculty; PT faculty; grant faculty; All Other; and the summary.
  - a. Each template will include the following data elements provided by the department:
    - 1) Home Department
    - 2) Position Number
    - 3) Employee Name
    - 4) ADP ID if currently or previously employed by USG school
    - 5) ADP Supervisor name and ID
    - 6) Session employed determined by the file name. Options are Maymester (session 1), Session 2 (June & July), Session 3 (June only) and Session4 (July only)
    - 7) Total pay amount for the session
    - 8) Funding chart string
    - 9) Employee Type during regular academic year – full-time or part-time faculty – determined by tab name.
    - 10) Purpose of Employment – Instruction, Research (*grant-funded*), or Other – determined by

tab name.

- b. To streamline data entry and reduce errors from cutting and pasting data across tabs, all data will be entered on the “Summary” tab. Data will auto-populate the other tabs. Please indicate which tab should contain the entry by placing a 1, 2, 3, or 4 in the tab column.
  - c. The template will be printed on the 4-part PAR paper allowing for the department/college, provost office, budget office, and payroll office to all have a signed copy.
  - d. Any PARS or FCA’s that are required need to be submitted along with the signed template.
  - e. Academic Affairs will verify if summer earnings are within allowable amounts and Provost will sign template.
  - f. Budget Services will update the template to include:
    - 1) Distribution Code
    - 2) Earnings Code
  - g. The template, PARs, and/or FCAs will be routed first to the Dean for signature, ORSP for grant funds, then to the Provost office for signature, then to Budget, and on to Payroll.
  - h. The electronic file will be emailed to the Provost office by the dean’s office. The Provost’s office will email the electronic file to Budget who will email to Payroll with the hardcopy.
3. When changes are needed to the template, a new file will be submitted.
- a. Start with the original template or the latest revision
  - b. Add a new date, revision #, and highlight the data that is changed. This will keep the summary tab in the file up-to-date.
  - c. Will add column on template to indicate what’s changed. (*This was not completed by Budget Services; colleges are color-coding changes*)
  - d. Same routing process is required as in 2.d - g above.
4. Current faculty (in ADP as UWG employee) teaching for eCore will use Faculty Contract Amendment (FCA) for summer pay.
5. If current FT faculty are hired during summer to do work other than teaching or research (grant-sponsored), a PAR must be submitted. This activity is outside the normal academic contract. Examples would be offering professional development services to the university business office or designing curricula.
- a. The PAR is prepared by the hiring department.
  - b. The PAR is routed to the home-department, dean’s office for approval and inclusion on the summer template on the “Other” tab, then to the Provost office for approval.
6. Joint Staffing Agreements for the summer will be processed with a FCA.
7. Please view the summer calendar on Budget Services website under “Budget Calendars” at: <http://www.westga.edu/budget/>

*NOTE: All graduate students and faculty hired for duties other than teaching and research are hired using a PAR.*