

Budget Manager's Meeting Notes

September 19, 2013 (blue type indicates comments added during meeting)

3:00 pm, Aycock Hall, 2nd Floor Conference Room

1. EXCEL Review (standard item)

Conditional Formatting – see handout.

2. Introductions (standard item)

3. Report from the Controller's Office –

October Preview: How revenue flows from the cashiers' window to your department chart string in PeopleSoft – Pat Murphy.

4. Report from Human Resources - *Rodney Byrd*

Open Enrollment – The Board of Regents recently approved the 2014 changes to our system-wide health care plans. In the coming weeks, you will receive information detailing these changes. The effective date of the changes will be January 1, 2014. Please note that during open enrollment, you will be required to take action and make some important decisions about your health care coverage.

Some highlights of the 2014 benefit changes are list below. Please refer to the attached list for a complete summary of changes.

- There will be **NO** premium increases for employees on the BCBS plans! Premiums for the vast majority of our employees and retirees will remain the same as they are today.
- Members enrolled in the Kaiser HMO Plan will see a modest increase of 4.27%.
- Mail order prescription delivery options were added to the HSA Open Access POS and HMO plans. The Open Access POS plan already offers mail order service.
- Increased the Kaiser HMO office co-pay by \$5.00 (\$15.00 to \$20.00).
- Increased the Blue Choice HMO co-pay by \$5.00 (\$15.00 to \$20.00).
- Increased participant co-insurance in the HSA Open Access POS plan from 10% to 15% once the employee has met deductible.
- For retirees/spouses turning 65 in 2014 and thereafter, the Board of Regents Healthcare plan will only provide secondary coverage. Medicare Part B should become the primary coverage as soon as they are eligible. This will help employees avoid possible penalties.
- Tobacco surcharge will be extended to dependents of the employee. **ALL** employees will be **REQUIRED** to actively select if they or their dependents on the plan are active tobacco users. All employee records will default to "Tobacco User" at the beginning of the open enrollment. **YOU MUST ACTIVELY SELECT "YES" OR "NO"**.
- Rodney stressed to the budget managers that they take this information back to others in their departments because this is an active enrollment.
- Open enrollment begins November 11, 2013 and will only last for 2 weeks. Prior to and during those two weeks, HR will be sending out reminders through emails, texts, and actual mail.
- Rodney reminded everyone that the benefits fair will be held on November 12th.

Please feel free to contact Human Resources at 645-839-6403 if you have any questions.

Wellness Expo – If you would like to join a walking or jogging team you still have time! UWG received a \$10,000 grant from the Board of Regents to sponsor wellness events this year.

- Rodney noted that on October 16th we will have a guest speaker on campus to discuss wellness. Other wellness events will be coming in the future as well.

December Monthly Pay Dates – The faculty will be paid on Friday, December 13 and all other monthly employees will be paid on Tuesday, December 31 this year.

- The bi-weekly pay dates will stay the same per the bi-weekly schedule.

5. Salaries on Department of Audits Website – Information Only

We've received a few questions lately regarding state employee salaries listed on the Department of Audits website. Please note the salaries are taken from actual payroll records totaling all paychecks issued during a fiscal year--between July 1 and June 30. If the paycheck date falls within this range, it is included the fiscal year. For faculty it includes the academic contract amount, summer school payments, contract amendment pay, eCore payments, payments from grants, joint staffing agreements, and any other payments that may be processed through payroll such as travel reimbursements, relocation expenses, etc.

6. Annual Mandatory Training

The Center for Business Excellence will be conducting required annual training for all UWG faculty and staff in October. To help generate an accurate listing of employees for tracking, please submit PARs for all individuals who are no longer employed but still show on your ADP timecard approval screen. The PARs need to be submitted to Budget Services by September 17.

A list of all employees required to take the training and progress toward completion of each training module may be found on the CBE training website at <http://www.westga.edu/training/> in October. If you see an employee listed who no longer works for you, please submit a separation PAR. Until the document is processed, the manager is responsible for the individual to complete the training.

- a. Dixie Curley in Payroll will be sending out the 120 day report that lists all active employees who have not received a payment in the last 120 days. The budget managers can use that report as a resource to aid in cleaning up their payrolls for the Mandatory Training list.
- b. Kristin reminded the budget managers of the Filled Position list located on Budget Services website. The budget managers can use that report as a resource to aid in cleaning up their payrolls for the Mandatory Training list.

7. ADP Reporting Upgrade

The beginning of September the Budget Office sent out emails notifying the Budget Managers of an upgrade in the ADP Reporting software. In the emails, we suggested that users of the ADP Reporting feature (anyone that runs a payroll distribution report) register for online training. On September 9 & 11, we sent the email to Budget Managers which included the instructions for creating an iLearn account and registering for the iLearn class.

On Saturday, September 13, the new format was implemented. The look and feel of the program is very different so it is important that you log on and review the training. Please refer to the email mentioned above to access the training.

Additionally, the Budget Office will sponsor an overview of the new reporting upgrade on Monday, October 7, from 2:00 pm to 3:00 pm in the 2nd floor conference room of Aycock Hall. If you run payroll distribution reports, we encourage you to attend. Also, we strongly encourage everyone to review the training prior to the meeting so your specific questions may be answered. [As of the today, the training is not listed on the Center Business Excellence training website.](#)

8. FY2015 Budget Request and Hearing

The university received notification that we are scheduled to present our FY2015 budget needs to the Board of Regents on November 7, 2013. This is much earlier than we anticipated and with much less lead time than in the past. Last year, we presented our FY14 needs in early March 2013. You may be expected to provide some analysis for your area in the next few weeks.

Please remember to include fringe amounts in any salary numbers you provide. Also, if additional funding is needed for supplies, office setup, etc. please remember to include and identify how much for each item. Once your amount is identified and funded, that's all you may receive.

[Subsequent to the meeting, the university was informed the budget hearing will be rescheduled to after the first of the year.](#)

9. Budget Analyst Assignments

Please check our website at http://www.westga.edu/budget/index_16962.php to view the revised assignments.

[Kristin reminded the Budget managers that they will continue working with their existing Budget Analyst until Keysha Patterson is fully integrated into her new position.](#)

10. Roundtable

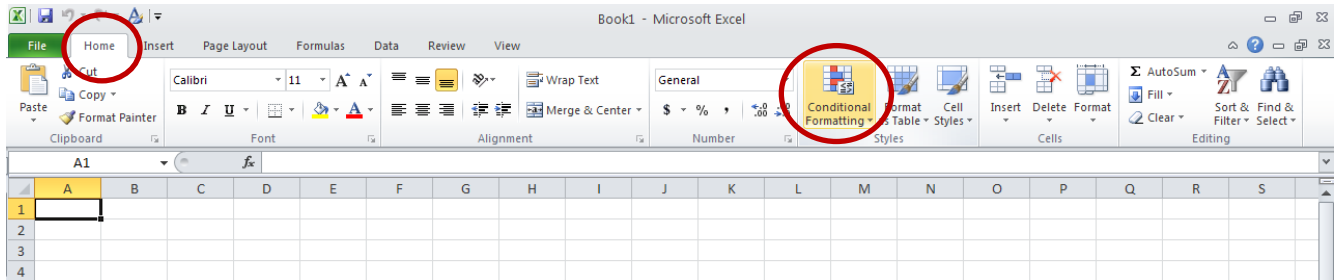
- [Next week Alex will be conducting interviews for the vacant Accounting Assistant position in Housing that will be replacing Pamela Chambers.](#)
- [Kari reminded everyone one of the upcoming 5-Year Plan. Since Kari will be out on maternity leave starting in mid-November they are starting the process early this year. Kari will be sending out the template in the next few weeks and that will be due back in mid-October. The overall goal is to have Mr. Sutherland's approval and signature by mid-November. The 5-year plan itself will not be due until February 7th.](#)

Conditional Formatting Tool (Finding Data)

When worksheets can contain large sets of data, highlighting specific values in a format different from the rest of the worksheet data can make those values stand out. This can be useful in a report or to help you find the specific data.

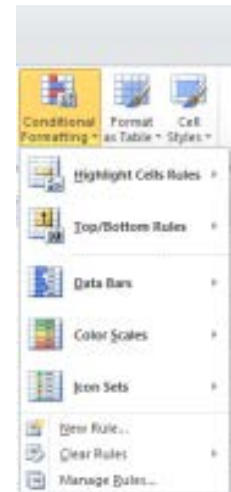
Conditional Formatting:

Conditional Formatting Tools are found on the *Home* ribbon in the *Styles* menu.



Clicking on the Conditional Formatting button will open the drop-down menu. There are several different highlighting options, each depends on the data you want highlighted.

- **Highlight Cells Rules:** Highlights cells based on a given condition.
Example: Cells less than 50 or duplicate cells.
- **Top/Bottom Rules:** Highlights cells based on statistics.
Example: Top 10% cells, bottom 10 cells, or above or below the average.
- **Data Bars:** Highlights cells based on that cell relation to the others in the list.
Will resemble a Bar Graph.
- **Color Scales:** Highlights cells based on that cell relation to the others in the list.
Will group cells by color.
- **Icon Sets:** Add Icon [picture] to cells with given conditions.
- There are also management options for conditional formatting.



Examples:

The examples use two lists - an active employee list and a list of expenses. For each example you need to ask yourself, "What conditions or data are you looking for and what is the unique identifier?"

Example 1: How many Student Assistants are employed in two or more positions?

Condition/Data	Unique Identifier
Student Assistants	Pay Group - 54T
Same employee hired more than once	Duplicate Employee IDs
Split Funded Positions	Percent of Distribution not equal to 100

1. Select the Pay Group column, then click on Conditional Formatting \ Highlight Cells \ Equal to . . . and fill in 54T then OK. At this point you can also adjust the formatting. The example uses the default setting. You should see some of the cells highlighted.

2. Next select the Employee ID column, then click on Conditional Formatting \ Highlight Cells \ Duplicate Values and OK. You also have the opposite option [Unique Values].
3. Filter the data. If you filter by the highlight [color] in Employee ID, the list will be all Employee ID in more than one position. If you filter by the highlight [color] in Pay Group, the list will be all Student Assistants. Filtering by both gives you the list of student in more than one position.

Example 2: What is the bottom 7% of our supply budget for the first three months? And what are the Top 10 changes?

Condition/Data	Unique Identifier
Highest Supply Expenses	Highest 10 entries
Lowest Supply Expenses	Lowest 7% of all entries

1. Select the Amount column, then click on Conditional Formatting \ Top/Bottom Rules \ Top 10 and OK. You have option to change the number. You should see that some of the cells highlighted.
2. Select the Amount column, then click on Conditional Formatting \ Top/Bottom Rules \ Bottom 10%. Change the 10 to 7 then click OK.