1. **Introductions (standard item)**

2. **Report from the Controller’s Office – Randy Miller**

   FYE Deadlines and FYE Travel Encumbrance Process
   a. All deadlines located on Controller’s Office website.
   b. Patricia Durrough will be creating new trainings to be offered soon for: Food Purchasing, Retreat Planning, Group Meals. Be on the lookout for those trainings.

3. **Report from Human Resources/Payroll - Alicia Hargraves**

   New JSA Process effective 7/1/201
   HR was unable to attend this meeting. Alicia Hargraves has been asked to join the June meeting to share this information.

4. **FY17 Salary Increase Update:**

   b. FY2017 Merit Template Instructions – Handout attached on pages 5-6

5. **Filled Student Assistant and Temporary Labor positions**

   This Wednesday (5/18) an email was sent out to all budget managers that included a list of currently filled SA & TL positions that have no FY17 budget. We will need all these items addressed with separation PARs or FY17 BAs no later than June 17th. The effective date on any separation PAR we receive should be no later than 6/17/2016 (unless you are also submitting FY17 budget as well).

   Please share this information with your departments and work to resolve these issues as soon as possible.

6. **FY17 Final Budget Development Worksheets:**

   a. The Budget Office will have the final FY17 BDWs for all fund codes completed by the end of May. These worksheets will be emailed out to the VPs Office once those are completed for a division. These worksheets will contain new FY17 budgets. If you have any questions when you receive your final worksheets please bring those questions to the attention of your analyst.

   b. The listing of New FY17 Funding Distribution will be distributed in a separate handout during this meeting. The file will be listed on the Budget Office website in the weeks to come.
Roundtable

- Alex shared that Food Services will have a different chart string for FY17. Contact Thad Dooley for that information for FY17 payments.
- Harry Nelson shared that there is a new process for Foundation payments. This new process requires additional documentation from departments to be in line with a new board approved policy. Holly Sailors will hold a meeting in June to explain the new requirements. No date has yet been provided.
- Sharon shared that COE will be undergoing a reorganization this July for the new fiscal year. This reorganization will consist of converting 6 departments to only 4 and all departments will undergo a name change.
- Alex shared that departments need to be on the lookout for emails from Aramark seeing reimbursement for outstanding charges. Departments will pay Aramark directly, not Food Services.
FY2017 Salary Increase Allocation Process

For FY2017 there are potentially 4 different types of salary increases that may occur:

1. Equity:
   a. Vacant positions will be provided equity funding during the first year of the equity allocation when filled.
   b. New positions for FY2017 are funded at the entry point and will be adjusted for equity if applicable.
   c. Funding for unfilled new and vacant positions will be held in an equity reserve and allocated when positions are filled. [create new dept id]

2. Merit:
   a. To be eligible must be employed in ADP by October 1, 2015.
   b. University providing 3% allocation for every eligible employee as designated by HR.
      - Merit funding will not be provided for position not eligible for a merit increase (no evaluation or evaluation rating of N and U).
      - Positions with funding changes from self-support to E&G effective July 1, 2016 will be included in E&G allocation.
      - Vacant positions as of April 4, 2016 (when the data was pulled) are not included in merit allocation distribution.
      - If an evaluation was not completed, a rating of “meets” will be assumed.
      - Permanent part-time positions are included in allocation distribution if the employee meets the criteria above.
   c. Employees with an evaluation score of at least a meets expectations will receive a minimum increase of 1%. Those with an evaluation score of exceeds expectations or significantly exceeds expectations may receive an increase of up to 5%. Increase levels must respect the hierarchy of the evaluation score within a budgeted unit. Supervisors are required to submit justification for increases that do not respect hierarchy and receive approval from the respective Vice President.
   d. If a position becomes vacant between the date the data is pulled (April 4) and when the merit worksheet is completed by the department,
      - The funding allocation for the vacant position cannot be used for other employee increases. The funding reverts back to the institution (university reserve).
      - If a department does not comply with this requirement, the department’s budget may be reduced permanently effective July 1, 2016 for the amount awarded not in compliance.

3. Retention:
   a. Funds are not provided by the university. Retention funding must come from departments, college, division, etc. awarding the retention.
   b. There is no limit on the size of the retention increase. Any increase 10% or greater must adhere to current salary increase rules, i.e. VP for Business and Finance approval.
   c. Justification must be provided.

4. Promotion/Tenure:
   a. Must be approved by Provost and President.
   b. For faculty eligible for promotion and/or tenure will receive the higher of the promotion/tenure increase or the equity increase. Will not be granted both.
**Process:**
Each calculation will be determined separately using the current year salary as the base. Compounding of increases will not occur.

- **Equity increases** will be calculated by Human Resources
  - Increases will be identified as dollar/cents amounts to annual or hourly rate.
  - Increases will be processed from an Excel spreadsheet.
  - Funding will be provided by the university for state and general tuition-funded employees and processed by the Offices of Budget Services and Payroll.
  - All self-support funded employees’ equity increases will be paid from the same revenue source as their base salary. This includes eTuition, Graduate tuition differentials, miscellaneous fees, course fees, auxiliaries, grants, etc.

- **Merit increases** will be reported by department on an Excel spreadsheet for Budget and Payroll to finalize.
  - Increases will be identified as percentage increases.
  - Total amount awarded per department or division cannot exceed the amount allocated.
  - Employee data has been adjusted for known retirees or internal transfers after data was pulled and before data sent to departments. If an employee is included in department allocation and will retire by July 1 or has transferred to another UWG department, the department cannot use the allocation for another employee.
  - Funding will be provided by the University for state and general tuition-funded positions and processed by the Offices of Budget Services and Payroll.
  - All self-support funded employees’ merit increases will be paid from the same revenue source as their base salary. This includes eTuition, Graduate tuition differentials, miscellaneous fees, course fees, auxiliaries, grants, etc.

- **Retention increases** will be processed using a PAR with a budget amendment.
  - Increases will be reported as dollars and cents increases to the annual salary for exempt (monthly) personnel and to the hourly rate for non-exempt (biweekly) personnel.
  - Use the current FY2016 salary in the salary field.
  - In the comment section identify the type of increase and the amount.
  - Departments/Divisions must provide funding for increases.

- **Promotion/Tenure increases** will be processed using a PAR.
  - Increases will be reported as dollar increases to the annual salary.
  - Use the current FY2016 salary in the salary field.
  - In the comment section identify the type of increase and the amount.
  - Be sure to change the title if applicable.
  - Funding is provided by the University for State and General tuition-funded Faculty Positions and will be processed by the Offices of Budget Services and Payroll.
  - All self-support funded employees’ promotion/tenure increases will be paid from the same revenue source as their base salary. This includes eTuition, graduate tuition differentials, miscellaneous fees, course fees, auxiliaries, grants, etc.
  - Request all Promotion/Tenure PARs and BAs to be submitted at one time to Budget Services.

Letters will be distributed to all staff identifying the types of increases they received and their new salary/hourly rate with all increases applied.
FY17 Merit Template Instructions

General Information:
- Data for the spreadsheet was extracted from ADP as of April 4, 2016
  - All merit increases will be based on the salary in ADP as of this date
- All increases will be effective as of 7/1/16
- Biweekly employees’ increases will be entered on the 2nd biweekly July payroll and will include retro-pay for July 1
  - 1st biweekly July payroll includes nine days in FY16 and one day in FY17
- Files are protected to maintain integrity of the data
  - Only the ‘Minimum Percent of Increase per Eligible Employee’ and ‘Department Comments’ columns are unlocked/unprotected for entry
- The file was created using the funding department as the sorting criteria
  - If an employee’s home department and funding department are different, the employee will be shown on the divisional file of the department that funds the employee
- The divisional files contain three tabs (if applicable):
  - E&G (state-funded)
  - Self-Support (eTuition funded)
  - Self-Support (all other funds)
- If a position is split-funded, only the portion of the funding related to its divisional file is shown.
  - Please note that if an increase is given for an employee who is split-funded, both departments responsible for the funding for that employee will need to discuss the increase
  - A PAR may be needed to adjust the percentage of the split-funding
  - Comments have been added in the ‘Budget Comments’ column to indicate the other funding department
- The 3% allocation amount for the following have been removed:
  - Separations (that we are aware of)
  - Retirements (that we are aware of)
  - Any employee with a hire date of 10/2/16 to current
  - Evaluation rating less than “Meets”

Instructions to complete the merit template:
- Enter the percentage of increase in column X ‘Minimum Percent of Increase per Eligible Employee’ to be allocated for each employee.
  - A 1% increase for all merit-eligible employees has been pre-populated in the cells. You may allocate a higher percentage of increase but at the minimum, a 1% increase must be allocated for all merit-eligible employees
  - Merit increases cannot exceed 5%.
- The ‘Merit Amount Used’ column will calculate the dollar value associated with the percentage entered.
- The ‘Allocation Remaining’ column provides a subtotal for the amount of allocation used as percentages are added or changed.
- The file cannot be returned with a negative balance for the “Remaining Allocation.”
• If the status of the employee named on the file has changed due to resignation, retirement, termination, etc., and no longer meets the eligibility requirements to receive a merit increase, the amount of the allocation for the employee who is no longer eligible should be left as a ‘Remaining Allocation’ balance on the returned template.
  o Please note the change in the ‘Department Comments’ column

• For all self-support merit increases, a budget amendment must be submitted at the time the completed template is submitted.
  o Budget Amendments must show each increase by position number
  o Fringe may be added to the amendment as lump sum amounts but must be separated by department ID
  o Example:

<table>
<thead>
<tr>
<th>Department</th>
<th>Position Number</th>
<th>Employee Name</th>
<th>Ledger</th>
<th>Budget Year</th>
<th>Account</th>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
<th>Class</th>
<th>Project</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welding</td>
<td>222</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>$300.00</td>
</tr>
<tr>
<td>Welding</td>
<td>245</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>200.00</td>
</tr>
<tr>
<td>Welding</td>
<td>450</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td>Welding</td>
<td>328</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>400.00</td>
</tr>
<tr>
<td>Welding</td>
<td>FICA 7.65%</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>250.00</td>
</tr>
<tr>
<td>Welding</td>
<td>RET 12.35%</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>96.00</td>
</tr>
<tr>
<td>Woodshop</td>
<td>489</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>$100.00</td>
</tr>
<tr>
<td>Woodshop</td>
<td>300</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>220.00</td>
</tr>
<tr>
<td>Woodshop</td>
<td>62</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>300.00</td>
</tr>
<tr>
<td>Woodshop</td>
<td>125</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>78.00</td>
</tr>
<tr>
<td>Woodshop</td>
<td>556</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>250.00</td>
</tr>
<tr>
<td>Woodshop</td>
<td>FICA 7.85%</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>73.00</td>
</tr>
<tr>
<td>Woodshop</td>
<td>RET 12.35%</td>
<td></td>
<td>CRG_ID</td>
<td>2017</td>
<td>$72,000</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>118.00</td>
</tr>
</tbody>
</table>

Aux Budget Amount Updated: Processor Date (permanent adjustments only) $2,640.00

<table>
<thead>
<tr>
<th>Department</th>
<th>Ledger</th>
<th>Budget Year</th>
<th>Account</th>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
<th>Class</th>
<th>Project</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Woodshop</td>
<td></td>
<td>2017</td>
<td>700800</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>($1,591.00)</td>
</tr>
<tr>
<td>Woodshop</td>
<td></td>
<td>2017</td>
<td>700800</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td>(1,139.00)</td>
</tr>
<tr>
<td>Woodshop</td>
<td></td>
<td>2017</td>
<td>700800</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Woodshop</td>
<td></td>
<td>2017</td>
<td>700800</td>
<td>10500</td>
<td>1041238</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

o Large budget amendments may be submitted electronically to khulse@westga.edu in Budget Services (in addition to submitting the approved paper copy of the amendment) for auto-upload into PeopleSoft.