Budget Manager’s Meeting Notes  
September 15, 2016 (blue type indicates comments added during meeting)  
UCC 3rd Floor Conference Room

1. **Introductions (standard item)**

Megan Tait, Assistant Director Student Employment and Experiential Learning, Career Services

2. **Excel Training – Daron Prator (see handouts)**

Daron Prater from Budget Services will review a different function to use in place of the standard “VLookup” that considers duplicate items in a column.

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

None. Alicia Hargraves was in attendance to answer any questions that may arise.

4. **Report from Career Services – Megan Tait**

Megan introduced herself, briefly shared about Career Services, and reminded everyone that all undergraduate student employment goes through Career Services. Also, Career Services has scheduled a workshop on September 30, 2016 from 2-4 pm in Room 319 of Aycock Hall regarding processing in PeopleAdmin for students. There will be a brief overview with an open lab available for the remainder of the time. Please bring any transactions you need to process and one-on-one, hands-on help will be provided.

5. **ePAR Update – Liz Baker**

Dale Drive, Tricia Durrough, and Karen Hulsey have been working diligently over the past year and a half developing our electronic PAR form. A significant amount of development work was required to accommodate our multiple approval workflows based on division and employee type. By spring 2017, we will extend the form to other divisions. SAEM, Townsend Center, ITS, President, and Athletics will begin using the electronic form for all employee types except GAs and grant-funded employees on January 3. Academic Affairs will have access in March 2017. The program will not be open for Graduate Assistants and grant-funded employees until fall 2017 due to the additional workflow features required.

Below is our current timeline. Important dates for you are highlighted in yellow.

- August 29-September 8 – Tricia and Karen will review test database for each action/reason scenario and validate data on forms (scheduled for Aug 31, 8:00-10:00am)
- September 9 – Tricia and Karen’s review results due to Dale
- September 12 – September 30 – Dale updates all changes in test database
- September 28 – status meeting
- October 3 – 7 – Test database final adjustments or catch up
- **October 10-14** – 4 hour block for user testing (currently Jo Etta Miller, Erin Brannon, and Lucretia Gibbs)
- October 17-Nov 3 – Dale completes all updates in training database from user testing findings
- November 3 – status meeting
- November 7 – November 11 – Dale cleans-up database for training preparation
- November 14 - December 16 – Karen, Tricia, and new Functional Administrator assigned - create training manual
- November 14 – November 18 – Training for new users
- **November 23 – Begin Black-out – No ePAR’s; paper only until January 3**
- **November 28 – December 2 –** Additional training for new users offered
- December 5 – all remaining ePAR’s in system will be purged and will need to be re-created Jan 3
- December 5 – status meeting
- December 6 – 9 – Migrate to production
- December 12 – 23 – Verification of changes in production (Karen can assist on reduced schedule week)
- **January 3** – GO Live for all new ePAR’s for Business & Finance, Athletics, Townsend Center, ITS, President, SAEM, and UA except graduate students and grant-funded.
- January 3 – 13 – Tricia and Karen – Live labs for users to complete ePAR’s
- **March** – Academic Affairs – Student Assistants and Federal Work Study students ePAR’s accepted
- **Fall 2017** – GO Live for Academic Affairs, ORSP, grant-funded positions, and Graduate Assistants.

6. A. **FY17 Merit, Equity, & Retention (MER) Increases – Liz Baker**

This year’s implementation of salary increases was a “perfect storm” experience for everyone and unfortunately, every area of the campus contributed to the event. Budget and payroll staff missed entries and could not complete all analysis in time for payroll deadlines; departments made errors and revised numbers; divisions were late in submitting data and did not complete thorough reviews; managers were late in submitting evaluations; hiring decisions were changed; key personnel experienced significant family issues; staff equity data was not provided until the first week of July shrinking a month-long review into one week; and decision makers wanted to maintain the timelines. As a result, “the best laid plans…” Well enough of that.

The priority in processing payments was to ensure everyone was paid something. Department changes, supervisor changes, and position changes were considered secondary to producing paychecks. The good news is 99.5% of employees received paychecks. Payroll and Budget staff worked many extra hours and recruited other employees in the division of Business and Finance to assist with processing.

So how are we cleaning up the aftermath? As with any major storm, slowly and cautiously. We have segregated our reviews into “batches” modeling our approach used for summer faculty pay and faculty contracts—two events that experience many data revisions from departments. We are currently working on Batch 4 (errors known by September 1) for September paychecks. Any corrections identified after September 1 are being placed in Batch 5.
After the September monthly payroll data is accessible, the Budget Office will run a master salary comparison between what is in ADP and what should be there. Departments will be contacted if differences exist based on information provided to payroll/budget. Within the first two weeks of October, Budget Managers will be given their position tracking sheets. Please review these carefully. At the end of October, we will be implementing personnel changes due to FLSA requirements. We would like to have everything correct before then.

Please know that the payroll and budget staff worked very hard throughout this process and dedicated a lot of personal time because they care very much about ensuring people are paid. We may not have expressed that in a way you may have wanted because we focused our efforts on processing paychecks first. We apologize for our errors under these difficult circumstances and always strive for continuous improvement.

6. B. FLSA Updates

Questions were asked regarding the upcoming FLSA changes. As a result of changes in the federal Fair Labor Standards Act (FLSA), employees who make less than $47,476 and do not pass the job duties test will be classified as non-exempt (paid hourly and eligible for overtime). The job test consists of several factors including the level of independent decision-making. There are exemptions for academic and instructional employees that Human Resources will clarify.

Human Resources has provided department managers a list of their employees who currently are exempt (monthly) and will change to non-exempt (hourly). If the employee’s name was highlighted in yellow, you may have the option to keep them as exempt. You will need to discuss with Human Resources no later than September 30. Please note any additional salary and fringe requirements are the responsibility of the department.

Employees impacted will be notified in the next few weeks.

Human Resources sent an All Campus email on 9/16/16:
In the coming days and weeks, we will be working to communicate the coming changes for the Fair Labor Standards Act (FLSA) that will become effective November 1, 2016 for the University System of Georgia (USG). We are now following the established communication timeline of the University System that will include notifying impacted employees of exemption status changes in several communication phases. As a reminder, this change will shift employees from an exemption status of exempt, monthly salary compensation structure to a non-exempt, bi-weekly/hourly and overtime-eligible structure. We will release information to the campus as it is received from the USG.

7. FY17 Budget Development Update – Kristin Smith

Position tracking sheets will be distributed mid-October prior to the FLSA changes. Do not be worried about deficits in your salary lines at the moment. We are still processing budget amendments for salary changes.

8. FY18 Budget Development Process – Kristin Smith
New funding requests are due to your VP today and the redirecting of funds worksheet is due tomorrow.

Roundtable:

- Supervisor changes are requested by emailing payroll@westga.edu. A PAR is not needed.
- Please register for Engage West Staff edition on September 29 if you have not done so. An awesome agenda is planned!
- Women Empowering Women conference is tomorrow at Tanner Health Care in Carrollton.
- Constitution Day at the Library is Monday, September 19.
- Sunday is national cheeseburger day!
Functions to Replace V-Lookup

I. Index + Match

The function “Index + Match” can be a more powerful alternative to “V-look Up” due to V-lookups limitations. Such as:

- **VLOOKUP always searches the leftmost column of the specified table to find the lookup value.**
- **VLOOKUP can provide false results if the table is not sorted in ascending order!**
- **You can only specify the return value column by index number.** This means there is no way to include a static reference to the return value column. If someone adds a column between the lookup value column and return value column, it will break your VLOOKUP and you have to manually increase the column index number in the formulas. This is a maintenance nightmare.

This is why the "index+match" is preferred. It can do anything V-Look up can, without the above issues. So like v-lookup, index+match is used to look up values or return values.

Index alone will find something by searching through the columns & rows.

The match formula alone will tell you an items location in a list, whether it be text or a number. Meaning, it will tell you if the data is 1st, 2nd, or 12th in the list. If it is not on the list you will get “#N/A.”

**Syntax** - the excel syntax refers to the layout and order of the function and its arguments.

- **Index syntax**
  - **Array** = where do you want to look for this item.
  - **Row number** = (within array) self explanatory
  - **Column number** = (within array) self explanatory

  ![INDEX(array, row_num, [column_num])](image)

- **Match syntax**
  - **Look up value** = the item (text or number) you are looking for.
  - **Look up array** = where do you want to look for this item.
  - **Match type** = do you want an exact match, or in the case of numbers greater or less than.

  ![MATCH(lookup_value, lookup_array, [match_type])](image)
This is what the actual index + match formula I used in example A. looks like:

=INDEX(F2:F11,MATCH(I2,B2:B11,0)) <- (two formulas combined)

This is what the actual index formula I used in example B. looks like:

=INDEX($B$2:$F$12,I2,I3)
II. ISnumber + Match

This formula is really useful for comparing two lists.

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>List 1</td>
<td>List 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>287</td>
<td>136</td>
<td>TRUE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>173</td>
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<td></td>
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<tr>
<td>6</td>
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<td>FALSE</td>
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<tr>
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<td>2</td>
<td>4</td>
<td>TRUE</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In this example, the "match" formula is wrapped or nested with the "is number" formula to compare these two lists. I've also used some conditional formatting to make any true statements stand out automatically.

I want the formula to tell me if the items in list 2 are also in list 1.

The "match" formula alone will tell you an items location in a list, whether it be text or a number. Meaning, it will tell you if the data is 1st, 2nd, or 12th in the list. If it is not on the list you will get #N/A.

I prefer to get a "true" or "false" answer, so I wrapped or nested the "match" formula within the "is number" formula.

All the "is number" formula will do is tell you if the data is a number or not, by giving a "True" or "False" statement, thus getting rid of the #N/A the match formula would give you if used alone.

So, if you combined the "match" & "isnumber" formulas you have a pretty good formula for comparing things or lists, no matter their order.
This is what the actual formula I used looks like:

=ISNUMBER(MATCH(D4,$B$4:$B$12,0))

I just wrote it once in cell F4 and copied it down.

- Match syntax
  - Look up value = the item (text or number) you are looking for.
  - Look up array = where do you want to look for this item.
  - Match type = do you want an exact match, or in the case of numbers greater or less than.

- ISnumber syntax
  - Value = add cell location and it will say "True" or "False" based on if it’s a number, or not.