

## Budget Manager’s Meeting Notes

April 20, 2017 (blue type indicates comments added during meeting)

UCC 3<sup>rd</sup> Floor Conference Room

**1. Introductions (standard item)**

**2. Excel Training - none for April**

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

a. Year End Update –

b. Accounting Office Contacts – Please review the Controller’s webpage for information regarding who to contact at: <https://www.westga.edu/administration/business-and-finance/controller/contact-info.php>.

c.

Here’s a sample of some of the information provided.

Contact Information

Type of Question	Contact Person	Contact Phone
Agency Acct Inquiries	Jessica Pugh, Lisa Kunkler	9-2238 9-2264
Agency Acct Payments	Anita Saunders, Lisa O’Neal, Juli Humphries	9-6394 9-5303, 9-6125
Bookstore/Food Service Invoice Payments	Karlie Patterson	9-2471
Campus Charges (warehouse, bookstore, pub/print, trip tickets, etc.)	Melissa Williams	9-5535

d. Posting Summer Revenue – Michelle Hawkins

The Accounting and Budget Office will conduct the first summer revenue analysis beginning the week of May 8, 2017. The Budget Office will prepare the corresponding budget amendments and send to Budget Managers. The spending authority associated with the revenue adjustments will be placed into operating supplies (account code 700000).

**4. Report from Human Resources/Payroll - none**

**5. DevelopWest Training Website Updates**

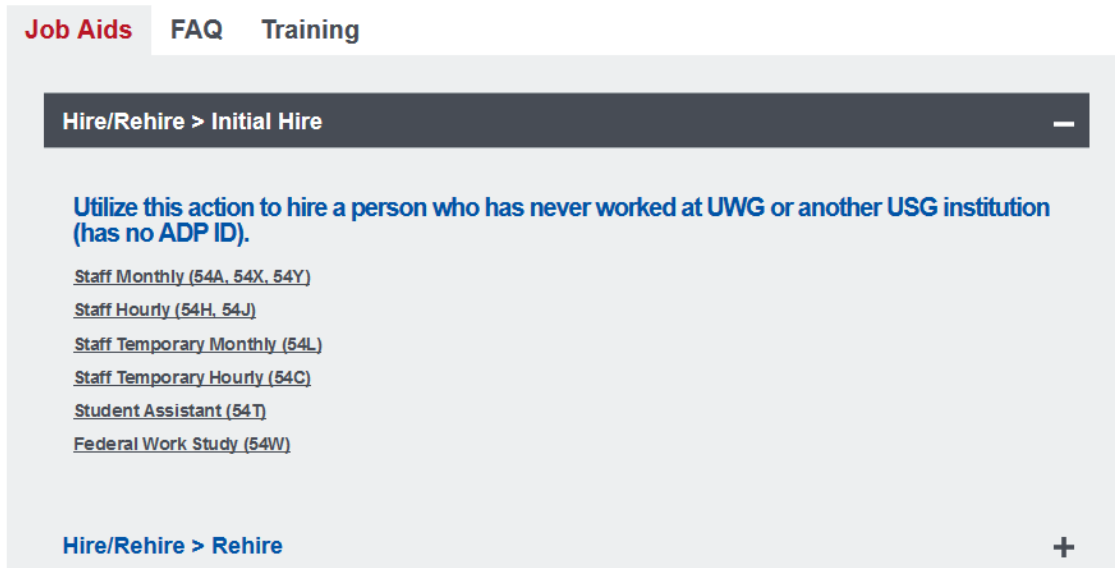
Last month we were notified about changes in the university’s training website-DevelopWest. To ensure everyone received this information, please refer to the first attachment.

## 6. ePAR Work Aids – *Karen Hulsey*

### a. Job Aids:

We want to remind everyone that the Center for Business Excellence has developed detailed work aids to assist you in using the ePAR system. It's easy to locate what you need as the aids were developed for each type of action for each employee type. Each job aid walks you through step-by-step instructions for completing the form and provides screenshots of what you should see as you move through the form.

You may locate the aids on Human Resources website under “HR Tools” or by using the following link: <https://www.westga.edu/hr/electronic-par-information/electronic-par-info.php> . Here's a screen shot of what the page looks like.



PLEASE share this with everyone who initiates and/or approves ePARs in your areas. And we always welcome comments and suggestions for improving these tools.

### b. Frequently Asked Questions (FAQs):

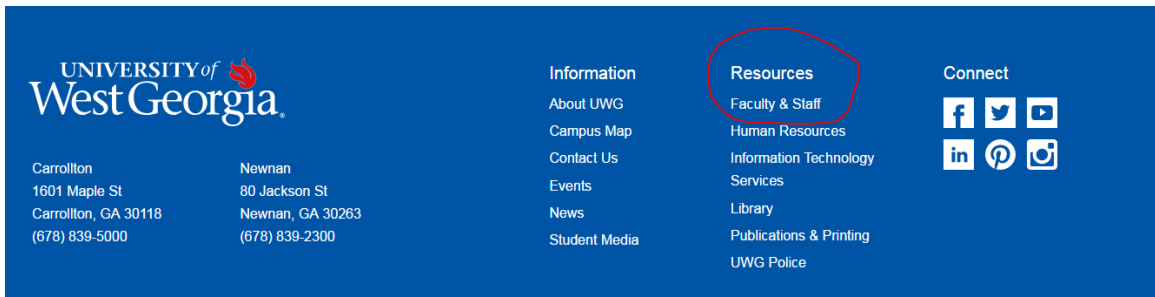
We had a lot of good questions asked in the ePAR trainings sessions. We have compiled a list of questions and answers that are included in the ePAR FAQ's tab on the website at <https://www.westga.edu/hr/electronic-par-information/electronic-par-info.php>

As additional questions are asked we are updated the FAQ section. Visiting the website first may save you some time in finding answers. Keep the questions coming!

## 7. Software Application Access

On the university main page there are links to the different applications used across the university.




- a. Go to the bottom of the main web page and select Faculty & Staff under Resources.



b. In the 3<sup>rd</sup> box on the right is a list of the different application portals which you may access.

## Faculty & Staff

Home / Faculty & Staff

		
<h3>Work West</h3> <ul style="list-style-type: none"> <li>• Work West Bulletin</li> <li>• Main Events Calendar</li> <li>• Faculty and Staff Meetings and Trainings Calendar</li> <li>• Work West Employee Toolkit</li> <li>• Frequently Used Forms</li> <li>• Employee Benefits</li> <li>• Engage West</li> <li>• Best of the West Employee Award &amp; Recognition Program</li> </ul>	<h3>Campus Services</h3> <ul style="list-style-type: none"> <li>• Information Technology Services</li> <li>• Publications &amp; Printing</li> <li>• Human Resources</li> <li>• Travel Services</li> <li>• Facilities Service Request</li> <li>• Reserve Facilities</li> <li>• Dine West</li> </ul>	<h3>Application Portals</h3> <ul style="list-style-type: none"> <li>• ADP Login</li> <li>• Banner</li> <li>• BanWeb</li> <li>• ePAR</li> <li>• SSC-Campus</li> <li>• PeopleAdmin</li> <li>• PeopleSoft</li> <li>• PeopleSoft Self Service Portal</li> <li>• Wolf Watch</li> <li>• webCV</li> </ul>

## 8. FSLA 8 hour adjustment – *Kristin Smith*

- a. For FY17 the Budget Office will be adding an additional 2/3s of a day temporarily to any E&G funded position that changed due to FSLA this year. This temporary budget will be given to the 521000 account. If you have already funded this yourself, this will be lapsed funds that you can use to backfill the funds you've already provided.
- b. For FY18, the permanent 8 hours of budget has been added to your E&G positions that changed due to FSLA this year.

## 9. Summer Student Job Posting & Reminders – *Karen Hulsey*

- There has been a slight change in processing Summer Student job postings (PeopleAdmin). At the time a summer student position is posted we do not know if the student applying and hired will be enrolled in summer courses. As a result, Budget Services does not know which position and budget to review. For that reason, our office will no longer be reviewing Summer Student PeopleAdmin postings.
- We have also requested that Career Services not use the 'budget' position number since that may not be correct depending on the job applicants.

- Career Services has received a lot of questions regarding summer student positions. One thing that many people have asked is who their budget manager is. If you will, please speak with the student paperwork initiators in your areas to make sure they know the budget manager to contact for questions and concerns.
- A student working in the summer that is not enrolled in summer classes is classified as 'summer temp.' Summer Temp positions are subject to 1.45% of FICA. The routing for these PARs/ePARs will include the higher approval levels such as VP's, Dean's, etc. because the position is defined as a part-time temporary staff and all staff documents are required to have additional approvals.
  - **Academic Affairs users only should not use Core Integrator to process ePAR's for this employee type.** The workflow and the associated approvers have not been set-up for any pay groups outside of student assistant (54T) and federal work study (54W) for the Division of Academic Affairs. All "Summer Temp" hires, for Academic Affairs only, should be processed using a paper PAR and routed to Career Services for approval. *All other divisions should use Core Integrator to process all transactions.*
- All "Summer Temp" positions that were used last fiscal year were inactivated. A budget amendment must be submitted to request a new position number. The position number must be created and requires an overnight update before it can be entered in an ePAR.
- Because this employee type is determined by enrollment status, it tends to be a moving target. Please ask your student whether or not they are enrolled in classes for the summer prior to preparing the ePAR / PAR. The enrollment status is verified at the Career Services workflow step.
  - If the employee is being hired as a "Summer Temp" and Career Services verifies the student is enrolled in classes at the time they receive the ePAR / PAR, it will be rejected.
  - Or if the employee is being hired as a "Student Assistant" and Career Services verifies the student is not enrolled in classes at the time they receive the ePAR / PAR, it will be rejected.

#### 10. **FY18 Budget Development updates – *Kristin Smith***

- Initial FY18 worksheets have been sent out to the VPs for all funds except 12xxx and 13000. Given the fact that our office is still finalizing offset numbers, we have decided that we will hold off on sending the worksheets for those funds out until the budget is finalized next week. You will receive your 12xxx and 13000 worksheets within the next two weeks.
- New FY18 funds have been shared with us from the Board of Regents. The President and VPs will meet today to begin finalizing the distribution of those new funds. If your area receives new funds in FY18, you will see those on your final FY18 budget worksheets.

#### **Roundtable**

## Academic Affairs Items

### Summer Faculty template – *Kristin Smith*

The updated 2017 Faculty Summer template is attached (last attachment) to this agenda along with updated instructions (2<sup>nd</sup> & 3<sup>rd</sup> page of attachments).

- The earnings code SUM (account 513000) can be used in departments outside of Summer Studies so long as the salary is for teaching summer course(s).
- The Provost Office has to approve any adjustments to the electronic template once the signed, paper copy has been delivered to the Budget Office.
- Shortened internal deadlines mean that the Budget Office will not have as much time to resolve budget issues on these templates. If funding is not available in the department, Budget will contact the Provost Office to resolve. If no resolution can be determined before the deadline, the payment will be moved to another session template.
- A Pay-as-you-go column has been added to the template this year. Please indicate Y (yes) or N (no) for each payment you have listed on the template.

# DevelopWest Upgrade (8i)

The screenshot shows the DevelopWest interface with the following elements and callouts:

- Callout 1:** Learning Plan icon in the top navigation bar.
- Callout 2:** The Library icon in the top navigation bar.
- Callout 3:** Search Content bar in the top navigation bar.
- Callout 4:** Quick Links menu on the left side, including Learning Transcript, Send Feedback, Certifications, Support, and Admin.
- Callout 5:** Featured Content section in the main area, containing three content cards: "Employee Exhaustion: Managing a Well-balanced Workload", "Creating Work/Life Balance", and "Time & Stress Management for Rookies".
- Callout 6:** Upcoming Events section on the left side, including Instructor Led Training and Live Events.

1. Learning Plan – formerly known as My Plan – where you will locate courses that you have saved or courses that have been assigned to you by someone else.
2. The Library – formerly known as Browse the Catalog, this allows you to search the various SkillSoft and UWG courses by topic, skill or competency.
3. Search Bar – allows you to type in a key word or topic and search on it.
4. Quick Links/Profile
  - a. The Learning Transcript is where you'll find the history of all the courses you've started and/or completed in DevelopWest. Once you click on this link, if you have completed a course, it will have a date under the Completed column and you'll have an option on the far right to print a certificate of completion.
  - b. Admin -- if you have access to the Admin function as a manager, this functionality will be under the Quick Links option.
5. Featured Content – content populated by DevelopWest Administrators to emphasize important content. During the 2017 calendar year, this is where you'll find the Learning Expedition content each month.
6. Upcoming Events – Instructor Led Training links will be available here. You will still use this functionality to register for trainings in the Center for Business Excellence.

## Summer 2017 Template Instructions

The summer faculty payment template has changed from previous years. Due to these changes, PLEASE read the instructions completely before you begin using the file.

Each session will be completed on the associated session tab. *Colleges/Divisions can create their own summary sheets within the file for their own use and Academic Affairs can create file to track 33.3% since not all money earned will be included on the summer payroll spreadsheets.*

### **Complete the Header Columns (Rows 1 through 4)**

- 1) Enter current date
- 2) Enter College/Department Name
- 3) Choose from the drop down box for 'Session'
  - **Session I - May 12 - May 30, 2017: Paycheck Issue Date May 31, 2017**
  - **Session II - May 31 - July 22, 2017: Two pay dates - half of the session amount paid **June 30, 2017** and the other half of the session amount paid **July 31, 2017** (payment should be evenly divisible by 2; no cents)**
  - **Session III - May 31 - June 26, 2017: pay date is **June 30, 2017****
  - **Session IV - July 27 - July 22, 2017; pay date is **July 31, 2017****
- 4) Choose from the drop down box for 'Version'
  - Each time you need to change data that you already submitted, please use the next revision number that applies and re-submit the file. Only changes will be made with the Provost's office authorization via email with the Provost and college Budget Manager on copy.

### **Provide hiring data for each employee using a new row for each separate funding source/chart string. Column Headings include:**

**Employee Type** - Choose from the drop down box for 1 of the following employee types:

- **Full-time Faculty** - Faculty currently active in a full-time benefited 10-month faculty position.
- **Part-time faculty** - Faculty that have previously worked for UWG and have an ADP employee ID. New part-time faculty require a PAR.

**Home Dept ID** - Department number of home department for employee.

**Last Name and First Name** - Please include FULL name (as name appears on social security card, no nicknames).

**Employee ADP ID** - If the employee is a new hire and does not have an ADP ID, a hire PAR is required. **Include \$0 as the salary PAR. The pay information will be loaded from the summer payroll template.**

**Position Number** - only applies if new hire. Full-time faculty and grant-funded payments will be paid from the chart string indicated; not a position number.

**Session payment amount** - No cents; Whole dollars only. Session 2 amount should include session 2-A and 2-B total; must be evenly divisible by two;

and will be paid in two installments (June payment and July payment).

**Funding Source Chart String** - fund-department-program-class of department who will fund the payment.

**Project Grant ID** - if purpose of employment selected is 'research', must provide a project ID and must be sent to ORSP for approval.

**Standard Hours Worked** - base this off of the USG's Contact to Standard Hours Worked Conversion Guidelines (e.g. one three-credit hours course is equivalent to 8.25 standard hours worked).

**\*NEW\* Course Information** - List all courses taught, including their CRN and course description, and the total number enrolled.

**PAYG Course?** - select "Y" or "N".

**Earnings Code** - from the drop down list, select "REG" for administrative or other duties besides teaching, or "SUM" for summer teaching duties.

**Note that "REG" should be used for part-time faculty positions. "SUM" charges the full FICA amount, including retirement, which is not applicable to part-time faculty.**

### **Due Dates**

**Session I - May 12 - May 30, 2017: VPAA Deadline - May 10, 2017**

**Session II - May 31 - July 22, 2017: VPAA Deadline - June 1, 2017**

**Session III - May 31 - June 26, 2017: VPAA Deadline - June 1, 2017**

**Additional Instructions:**

- All departments need to identify all 'Pay-as-you-go courses (PAYG)' in the "PAYG Course?" column
- Electronic copies and paper copies must be submitted for each session
- Provost must sign paper copies
- Revisions will be submitted to the Budget office by the Provost's office with the Provost and college Budget Manager on copy. No emails/phone calls will be accepted for changes to the Budget office or HR.



