Business Update

June 16, 2015
Agenda

• Welcome

• Campaign Update
  o Objectives & Pillars! Progress! How you can Help Advocate!

• Financial Services Update
  o Policy 101.18 – Gifts, Awards, & Prizes
  o Tax Change Impacting Reimbursements
  o New Reporting Dashboard – Budget Availability & Fund List
  o View Access to AP/TCP Documents in ImageNow for Business Officers/Leads
  o Year-End “Clean Up” Tips & Reminders

• Human Resources Update
  o New Benefits Director & Affordable Care Act Reminders before Summer
  o NinerTalent – Training & Key Deadlines before July 1

• Information Technology Update
  o Google Migration - Progress, “Best Practices”, Tips
  o New Hiring Process & Password Manager
Campaign Update

Jennifer Beightley
Campaign Director
University Advancement
**Campaign Objectives & Pillars**

- **Objectives**
  - To engage and involve our Alumni, donors, and friends in achieving a shared, aspirational vision for UNC Charlotte.
  - Where do we want to be in 2019?

- **Pillars**
  - Scholarships and Access
  - Campus Life/Athletics
  - Transformational/Interdisciplinary/DSI
  - College Priorities
Goal: $200,000,000

- Raised To-Date, $71,922,007
- Remaining To Goal, $128,077,993

Campaign Pillars:

- Scholarships And Access: $20,800,000
- Campus Life/Athletics: $27,600,000
- Transformational/Interdisciplinary: $20,500,000
- College Priorities: $3,000,000

Raised To-Date and Remaining To Goal:

- Raised To-Date
- Remaining To Goal

Campaign Pillars
Questions?

Jennifer Beightley
Jennifer.Beightley@uncc.edu
704-687-8141
Financial Services Update

Policy 101.18 – Gifts, Awards, & Prizes

Megan Hauser
Tax & Payroll Manager
Controller’s Office
Ext. 7-5819
Policy 101.18 – Gifts, Awards, & Prizes

Prize Winner Form *no longer required or available!*

**New Forms & Procedures**

- **Appendix B**: Reportable Gifts, Awards, & Prizes Form
  - only required for *reportable* gifts, awards, or prizes
  - submitted to Tax Office *within 2 weeks* after disbursement
  - *not required with Direct Pay Request (DPR)*

- **Appendix C**: Gifts, Awards, and Prizes Log Sheet
  - NOT submitted to Tax Office
  - for departmental use only; substantiates distribution in the event of an audit or review
Considerations

• **Employee vs. Non-employee**
  – If Employee: What type of gift, award, prize?

• **Cash vs. Non-cash (i.e. Tangible Personal Property)**
  – All cash is taxable and must be reported to the Tax Office, unless made to a charity in the name of the University for sympathy or congratulatory gifts
  – For non-reportable limits refer to Appendix A

• **Nonresident Alien (NRA) recipients**

• **Human Subject Payments**
### Non-Reportable Limits - Appendix A

<table>
<thead>
<tr>
<th>Type of Gift, Award, or Prize</th>
<th>Non-reportable(^1) Per Person Amount</th>
<th>Tax Reporting if Amount Exceeded</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Non-Cash Gifts/Awards/Prizes(^2,3):</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recognition(^3)</td>
<td>$100</td>
<td>A</td>
</tr>
<tr>
<td>Length of Service or Retirement</td>
<td>$400</td>
<td>B</td>
</tr>
<tr>
<td>Safety Achievement</td>
<td>$400</td>
<td>B</td>
</tr>
<tr>
<td>Prizes, Incentives, and Other Gifts(^3)</td>
<td>$100</td>
<td>A</td>
</tr>
<tr>
<td>Sympathy or Congratulatory Gifts(^3)</td>
<td>$100</td>
<td>A</td>
</tr>
<tr>
<td><strong>Employee Cash Gifts/Awards/Prizes:</strong></td>
<td></td>
<td>C</td>
</tr>
<tr>
<td>Non-employee Gifts/Awards/Prizes(^2):</td>
<td>&lt;$600</td>
<td>A</td>
</tr>
<tr>
<td>Human Subject Payments:</td>
<td>$25</td>
<td>A</td>
</tr>
</tbody>
</table>

- View Appendix A for full footnote and reference descriptions
Considerations

• Gift Certificates and Cards
  – See Section VI, Policy 101.18 to determine if the gift certificate or card qualifies as non-cash, subject to the reportable limits

• Approved Payment Methods
  1. P-Card
     • Appendix B must be submitted to the Tax Office if considered a cash (e.g. gift card) or reportable non-cash gift/award/prize.
  2. Direct Pay Request (DPR)
  3. Petty Cash
     • ONLY for Human Subject payments of $25 or less
     • Appendix C must be attached with Petty Cash Reimbursement
Questions???

Megan Hauser
Tax & Payroll Manager
Ext. 7-5819

Rebecca Urquhart
Tax Accountant
Ext. 7-5742
Upcoming Change – w/ Anticipated July 15 Effective Date

Recent Tax Changes Impacting Reimbursements

• Current Practice
  – Taxable income if not submitted within **90 days** of when the expense was paid or incurred

• New Guidance/Requirements
  – Taxable if not submitted within **60 days** of when the expense was paid or incurred
  – [Internal Revenue Code Section 1.62-2 (c-g)&(i)]
  – Internal processes and guidance are being updated
  – Additional communication coming soon
Financial Services Update

New Departmental Financial Reporting Dashboard

Derik Screen
Financial Services Reporting Analyst
Financial Systems Support
Ext. 7-1133
Campus Departmental Finance Dashboard

What:
- A WebFocus portal developed to help Financial Managers and their delegates get up-to-date data and reporting

Why:
- Access to your Financial Data when you need it
- **Budget availability** by FOAP (Fund, Org, Account, Program)
- **Fund list** by Organization Code

Who:
- Financial Managers and other campus users who have **Banner Finance** Access

When:
Available as of 6/16/15
Campus Departmental Finance Dashboard

Where:

https://reportcentral.uncc.edu/welcome/reportcentral.jsp

- Departmental Financial Reporting

You may contact finsystems@uncc.edu for access or support.
Campus Departmental Finance Dashboard

Reports:

**Budget availability** by FOAP (Fund, Org, Account, Program) & **Fund list** by Organization Code
Financial Services Update

View Access to AP/TCP Documents in ImageNow

Julie Hughes
Travel & Complex Payments Supervisor
Controller’s Office
Ext. 7-5650
View Access to AP/TCP Documents in ImageNow

- **Who’s Eligible?**
  - Business Officers/Leads within your College/Unit

- **Interest Meeting Demonstration**
  - July 9 from 2-3pm in CHHS Room 109

![ImageNow UI](image.png)
View Access to AP/TCP Documents in ImageNow

• To Request Access
  – Contact: Julie Hughes with Name and Justification
  – After approved, Complete Online Form
    http://workflowforms.uncc.edu/imagenow-forms/its-imagenow-add-remove-access-request
    • Request AP External Invoice Viewer
    • Request TCP External Invoice Viewer
  – Access through the web at https://ImageNow.uncc.edu
Financial Services Update

Year-End “Clean Up” Tips & Reminders

Alicia Bartosch
Business Process Analyst
Controller’s Office
Ext. 7-0950
Year End “Clean-Up” Tips & Reminders

Disbursements:

– Review and adhere to Year End Disbursement Cutoff Dates (Spend early)
– Refer to the May 49er Mart User Forum Presentation for detailed instructions:
  • Managing Open POs; (Complete Receiving as goods/services are actually received)
  • Using Documents Search;
  • Dates and Deadlines.
– New Fiscal Year 2016 orders can be placed beginning July 1
– Set up new Multiple Invoice Services Orders (MISO) for FY16 services

Funds/Accounts:

– Reconcile, Reconcile, Reconcile
  • Journal Voucher cutoff date was yesterday, June 15
  • Budget Revision cutoff date is tomorrow, June 17
– Grant Funds operate differently; you can continue to enter items
  • Please be patient with GCA as they work on correcting YE items
Year End “Clean-Up” Tips & Reminders

Fixed Asset Forms: (turn in ASAP, no later than 6/30)

- The Sooner the Better!
- Equipment Disposition/Transfer (Surplus)
- Fabricated Equipment
- Off Campus Equipment Use
- Trade-in Approvals
- Transfers between Agencies Approvals
- Reporting & Fixed Assets website
FY15 BMC Graduates – CONGRATULATIONS!!

April Spruill
Beth Rucker
Carolyn Irving
Cheryl Almond
Cyndi Hovis
Cynthia Gray
David Landrum
Denise Fluellen
Jessica Barton
Juandra Burris
Judy Vitallo
Karyn Romary
Kim Davis

Laini Pound
Laura Craig
Lydia Lawson
Margaret Williams
Mary Welsh
Patricia Artis
Patricia Bridges
Samantha Mello
Sandra Soriano
Shawnie Kent
Sheri Rice
Teresa Butler
Tracee Jackson

The Business Manager Certification Program was created to provide professional development for teams managing department financial resources using accounting, budgeting, and financial analysis methods and a range of personnel processes.
BMC Program – Under Reconstruction in FY16

Realigning Structure & Content with Goals to:

– Foster productive collaboration, teamwork, and communication;
– Inspire partnership-oriented management within and across divisions;
– Increase knowledge of University policies and procedures and encourage departmental ownership of consistent and meaningful application; and
– Empower administrative leaders and their teams to implement stronger control environments and more effective and efficient business operations to gain shorter processing times, more accurate financial reporting, and reduce risk.

– Watch the website for more information
– Expected Re-launch date of Fall 2016
Human Resources Update

Krissy Kaylor
Director of Benefits
Human Resources
Ext. 7-0649

Jared Waugh
Information Systems Manager
Human Resources
Ext. 7-0656
Benefits Update/Reminder

New Director: Krissy Kaylor, Ext. 7-0649

Affordable Care Act and Summer Employment

Effective January 1, 2015, student and non-student temporary workers who work an average of 30 hours per week for at least three consecutive months are eligible for employer-provided healthcare coverage.

Student employees are limited to working no more than 20 hours a week, during the academic year. However, in the summer, student employees not taking any summer courses are allowed to work up to 40 hours a week.

In April, HR made Vice Chancellors and Deans aware of this potential financial impact.

ACA Work Hour Exception Forms – Used by Dean or VC to approve Department be billed monthly

Rate Sheet
**NinerTalent (Formerly HRMS) – Coming July 1st**

**Who’s Impacted?**
- **All Employees** (EPA, SPA, Temp)
- Applicants
- System Users

**What’s Changing?/Benefits?**
- **People Admin Upgrade to 7.0** with new features and processes for campus users and applicants.
  - Faculty and EPA Staff Positions are Included!
  - Enhanced look; Customizable features, User-friendly navigation
  - Auto-save; Spell check; Fewer roles

  - **Create & Manage Postings**
  - **Easy-to-Find Listings**
  - **Self Service Application Portal**
  - **Hiring Pools**
NinerTalent (Formerly HRMS) – Coming July 1st

NinerTalent

Welcome to your Online Recruitment System

Inbox (230 items need your attention)

Displaying items for group "Initiator".

Postings (10+)  Hiring Proposals (10+)  Position Requests (10+)

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Type</th>
<th>Current State</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRIS Technician Reporting Analyst</td>
<td>SPA</td>
<td>Initiator</td>
<td>Initiator</td>
</tr>
<tr>
<td>Test 11/4/2013</td>
<td>EPA</td>
<td>Initiator</td>
<td>Initiator</td>
</tr>
<tr>
<td>Assistant Director for Career Assessment</td>
<td>EPA</td>
<td>Initiator</td>
<td>Initiator</td>
</tr>
</tbody>
</table>

Watch List (15 items)

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Type</th>
<th>Current State</th>
<th>State Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRIS Technician Reporting Analyst</td>
<td>SPA</td>
<td>Initiator</td>
<td>Initiator</td>
</tr>
<tr>
<td>Compensation Coordinator</td>
<td>SPA</td>
<td>Refer to Hiring Department</td>
<td>Human Resources</td>
</tr>
</tbody>
</table>

Shortcuts
- Create New SPA Posting
- Create New EPA Staff Posting
- Create New Faculty Posting

My Links
- Training Videos
- Your Applicant Portal
- PeopleAdmin MOPAC - Customer Portal Login
Thank you for your interest in employment at The University of North Carolina at Charlotte.

The University of North Carolina at Charlotte offers career opportunities in a variety of areas within our academic colleges and administrative departments.

The University of North Carolina at Charlotte is an Affirmative Action/Equal Opportunity employer. Women, minorities, veterans, and individuals with disabilities are encouraged to apply.

If you have questions about, or require assistance with, the online employment system, please contact the Human Resources department at: employment@uncc.edu or call: (704) 687-0669 between the hours of 8:00 a.m. and 5:00 p.m. (EST), Monday-Friday.

Individuals requesting accommodation under the Americans with Disabilities Act (ADA) may contact the Office of Disability Services at: disservices@uncc.edu or call: (704) 687-4355 (TTY/Voice) between the hours of 8:00 a.m. and 5:00 p.m. (EST), Monday-Friday.
Training (Upcoming Dates)

- Applicant Tracking (SPA) – 6/16, 23
- Performance Management – 6/18, 19, 25
- Posting an EPA Staff/Faculty Position – 6/18, 23
- Temp Hiring Manager – 6/23, 26, 29
- Register at [http://hr.uncc.edu/learning-and-development](http://hr.uncc.edu/learning-and-development)
Information Technology Services Update

Beth Rugg
Associate Vice Chancellor for Client Engagement
Information Technology Services
Ext. 7-6118

UNC CHARLOTTE
Google Migration Update

• So far so good!
  – Over 1,000 email accounts and distribution lists migrated
  – Over 100 workshops taught and over 1,300 people have attended training (Calendar + Gmail)
  – Migration scheduled to continue through July 23rd
  – Over 15,000 new student accounts migrated
  – Remaining students will go live August 6th

• Training ongoing through 2nd week of September
Google Migration Best Practices/Tips

• **Tips and Tricks**
  – Stop using Outlook Calendar!
  – No need to delete messages
  – All messages are in All Mail
  – Think about mail merges/forms or any other process developed in Outlook – don’t wait until the semester starts to figure out if it will work
  – No need to clean up old messages
  – Load PST files to Outlook at least 1 week before migration date!!
New Hiring Process & PW Manager

• Complete PEBEMPL form – only need enough info for background check
  – An accurate future employee class code (not placeholder 98 or 99)
  – The planned employment dates
  – The Job record that includes position is not needed for the account to get created initially

• GORIROL tables gets immediately/automatically updated in Banner

• New account for the new hire gets completed usually within the hour

• Notification gets emailed to new hire at whatever email address s/he provided
  – There is a chance a notice could go to an inactive account
  – ITS is not checking for bounce backs
  – If in doubt, department requester/new hire can call the IT Service Desk
New Hiring Process & PW Manager

• Sample Notification:

---------- Forwarded message ----------
From: <PasswordManager@uncc.edu>
Date: Mon, Apr 27, 2015 at 11:45 AM
Subject: UNC Charlotte Account Claim Notification
To: shaylasavage1976@gmail.com

From: UNC Charlotte Information & Technology Services
Name: Shayla Savage, NinerNET User Name: ssavag18

A NinerNET account has been established for you to access University electronic resources (email, desktop login, network drives, etc.).
To set the initial password, go to UNC Charlotte Password Manager by typing "pwmanager.uncc.edu" in your web browser and click on "Activate My NinerNet Account". If you have any questions or concerns, please call the IT Service Desk at 704-687-5500. Faculty & Staff use option 1. Students use option 2.

UNC Charlotte | Information Technology Services
9201 University City Blvd. | Charlotte, NC 28223
Phone: 704-687-5500
help@uncc.edu | http://itservices.uncc.edu
THANK YOU!!

Next Meeting - Tentatively

*Tuesday, September 22, 2015*