Business Update

February 17, 2016
Agenda

• Welcome
• ITS News
• Human Resources Update
• Travel Updates & Initiatives
• Financial Services – Imaging & Workflow Initiatives
• Other Financial Services Updates & Reminders
  o Kronos
  o Contracting: Independent Contractors vs. Honoraria
• Questions
ITS News

Beth Rugg
Assistant Vice Chancellor Client Engagement
Ext. 7-6118
ITS News

• Dropbox
• Managing Data (Google, Dropbox, H/S/J Drives)
• Windows 10 - coming on all NEW machines
• New Dell catalog interface
Real Time ITS Resources

- Twitter - @uncc_its
- ITS System Status
- FAQs
- News and Announcements
- Projects

- Service Desk available nights and weekends
Human Resources Update

Tracy Worthey
Director of Staff Employment
Ext. 7-0670
Compensation Philosophy

- **Employees** are paid within the salary range of the position’s **market rate**.
- All **new employees** should come in **less than market** to build up to the position’s full competency level.
- Employees being **promoted** to different bands, should be **started at the 90%** and given career progression increases as they gain full competency.

<table>
<thead>
<tr>
<th>Administrative and Managerial</th>
<th>Career Band Titles</th>
<th>Career Band Minimum</th>
<th>Contributing Reference Rate (CRR)</th>
<th>Contributing Maximum</th>
<th>Journey Minimum</th>
<th>Journey Reference Rate (JMR)</th>
<th>Journey Maximum</th>
<th>Advanced Minimum</th>
<th>Advanced Reference Rate (ARR)</th>
<th>Advanced Maximum</th>
<th>Career Band Maximum</th>
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<td>$42,263</td>
<td>$46,959</td>
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<td>$53,063</td>
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Compensation Status

“... this will... be a significant year for ensuring that we can continue to recognize and retain the talent we have been so fortunate to have represented in our faculty and staff.” – Chancellor’s University Convocation

• Finishing up phase 2
• Will begin working on phase 3
  • Have up to 30 days to review these actions. However, given the volume may take longer.

Phase 1: Faculty & SHRA salary analysis & coordination

Phase 2: Creation of new positions

Phase 3: Reallocations or career progressions
Temporary Staff

- **Electronic Personnel Action Form (EPAF)** - available for temporary staff employment starting in March.
  - Paper appointment forms (PD-17) will be updated to make changes to existing assignments. In EPAFs, can only submit new hires and reappointments.
  - Must post all temporary staff assignments in *NinerTalent*, if searching for a new person. This will help facilitate the creation of the 800# and the consent for the criminal background check.

- **Fair Labor Standards Act (FLSA)** - changing this coming year.
  - When requesting for a temporary staff employee to be paid semi-monthly (salaried) the FLSA exemption form must be completed and submitted to HR for approval, prior to start of the work assignment.
Exempt Human Resources Act (EHRA)

• No longer approving *Special Pay* request for EHRA Staff assignments.
• Will need to submit *Salary Increase* request through *NinerTalent*
• Position descriptions must be entered into *NinerTalent*, before a recruitment can start.
Salary Adjustment Questions

**SHRA**
Kieffer Gaddis, Director of Classification and Compensation
7-0654

**EHRA Faculty**
Lori McMahon, Associate Provost for Academic Budget & Personnel
7-5774

**EHRA Non-Faculty**
Jeanne Madorin, Executive Director for EHRA Non-Faculty Administration
7-5805
King 222 Renovations

• Will begin **February 22** and last for about **12 weeks**.
• **Learning and Development** has moved to the Cone Gallery (3rd floor)
• **Staff Employment** has moved to
  • King 225, SHRA, EHRA, & Temporary Staff new hires
  • King 226, Student Employment
  • King 201, SHRA Recruitment
• **HRIS** (part) has moved to 113 King
• **Benefits** has moved to 207 King
• Phones numbers are the same
Travel
Updates & Initiatives

Ron Sanders
Associate Controller – General Accounting & Disbursements
Ext. 7-5786
Travel Updates & Initiatives

**New Mileage Rates Effective 1/1/2016**
- Round trip > 75 miles - reimbursed at **34 cents** (regardless of motor fleet denial)
- Round trip < 75 miles - reimbursed at **54 cents** (IRS Business Standard Mileage Rate)
- For moving purposes - reimbursed at **19 cents** (non-taxable portion)

**Travel Authorizations** - No longer need to be Revised*
- *Unless* there is a fundamental change to the overall trip, or change in conference to be attended. For most other changes an email will be sent requesting approval. *No response will be considered approval.*

**Payment Strategy:** P-card is the preferred method
- University will be working to close all petty cash funds
- Moving towards departmental P-cards ([Effective July 1 - Pending Cabinet Approval](#))
- Creating workflows for items currently submitted as DPR's to 49er Mart.
Travel Updates & Initiatives

Effective March 1, 2016 - *Pending Cabinet Approval*

- Roll-out *Delegated Authority* Travel Reimbursement Process campus-wide

- New *Travel Forms* will be Mandatory
  - Travel authorization linked to the reimbursement
  - Final enhancements based on your feedback

- *Travel Advances* - Now a stand-alone form

Effective July 1, 2016 - *Pending Cabinet Approval*

- “*Travel Prepayments*” - Will be Eliminated (No Longer Necessary)
  - Upfront travel-related costs should be made via a University p-card. (e.g., registration, airfare, lodging reservations)
    - For a *Vendor* that does not accept credit cards, a *manual check* should be made through the *Direct Pay Request (DPR) process*. Should be rare.
    - If *Employees* choose to use their personal funds they should request reimbursement once the trip is completed.
Delegated Authority TR Process

Eligible Travel Reimbursements:
- *Domestic travel* with *no advances, within 60 days* of return date, *for $500 or less*

New Process Method:
- Pay prior to audit to reduce TCP processing to 1-5 business days
- Risk tolerance supported through quarterly post audits on a sample percentage basis
- Action may be required on reimbursements with findings
- Highlighted responsibility empowers departmental business staff to be subject matter experts
Financial Services
Imaging & Workflow Initiatives
Financial Transaction Request (FTR) eForm

Alicia Bartosch
Business Process Analyst
Ext. 7-0950
FTR - What does this mean?

Several Controller’s Office forms are moving to the University’s Imaging & Workflow system

• Authenticated single-point access to the eForm from web pages, portals, and more
• Secure central location for document storage, organization, & management
FTR - What does this mean?

**Accuracy** → Validation Tables & Workflow Approvals

**Efficiency** → Automated Paperless Process

**Flexibility** → Real-time Record Access & Reporting

**Transparency** → Audit Trails & Data Tracking
FTR – What forms are moving?

Journal Vouchers  (Journal Entry, Book Receipt, Book Disbursement)
Interdepartmental Invoices  (with or without encumbrance)
FUPLOADs  (limited population)
Credit Card Book Receipts  (currently an eForm)

New Name/Similar Look:
•  Financial Transaction Request (FTR)
•  Allows for the phase in of additional forms (at a future date)
  •  Cash & Check Deposits
  •  Budget Revisions
FTR - What will this look like?

Financial Transaction Request (FTR) Workflow

Perceptive Content 7 (C7)

FTR Submitted

If Valid

FTR image generated and notification sent to Department Approver for action

Department Approver: Approves or Rejects

If Approved

Notification sent to Central Office Approver(s) for action based on logic (FTR type, Fund type, and/or Account)

Central Office Approver(s): Approves or Rejects

If Approved

FTR posts to Banner
Financial Transaction Request Form

**Preparer:** Bartosch, Alicia

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Chart of Accounts</th>
<th>Approver</th>
<th>Effective Date</th>
<th>Rule Code</th>
<th>CMCS Transfer</th>
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</thead>
<tbody>
<tr>
<td>Journal Entry</td>
<td>1 - University</td>
<td>Verret, Gregory</td>
<td>02/11/2016</td>
<td>JNC</td>
<td>No</td>
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</table>

### Transaction Type Info:

<table>
<thead>
<tr>
<th>Index/Fund</th>
<th>Account</th>
<th>Description</th>
<th>Correcting Entry Document</th>
<th>DEBIT (dec. rev., inc. exp.)</th>
<th>CREDIT (inc. rev., dec. exp.)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Hash Total:** 0.00  
**Net Total:** 0.00

**Explanation**

[Blank field for explanation]
FTR – Form Functionalities

• Pre-populated Fields (Fund & Account Titles)
• Department Approver Designation
• Template Creation Ability
• Attachment Capabilities for Supporting Documentation
• Mass Journal Entry uses .csv template and eliminates FTP server
FTR – When will this happen?

Transition Timeline

- **Campus Forum/Demo**  
  *February 29*  
  *SAC Salon @ 2pm*

- “**Hands on**”  
  **Training**  
  *March 7-18*

- “**Go Live**”  
  *Early April*

- **Open Campus FTR Forum - 2/29**
  - All individuals currently responsible for using and/or processing these forms are invited
  - Project team will introduce the new FTR forms, demonstrate their functionality, and highlight the approval workflows in place

- **March 7 - 18 Training Sessions** (Sign-up on Google Sheet)
  - FTR Users - Form Preparer & “Approver”
  - FTR Processors - Workflow Secondary & Final approval  
    (AABP, AP, BUD, CP, FM, GCA, RFA, GA, SAO, TS)

- **Paper forms will no longer be accepted after “Go Live”**
Other Financial Services Updates & Reminders

Alicia Bartosch
Business Process Analyst
Ext. 7-0950
Kronos Roll-out Status

- The first 3 'waves' went live as planned; 11 'waves' remaining thru July 10
- **Up Next:**

<table>
<thead>
<tr>
<th>College of Liberal Arts &amp; Sciences</th>
<th>2/21</th>
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<tbody>
<tr>
<td>College of Education</td>
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</tr>
<tr>
<td>Urban Institute/Metropolitan Studies</td>
<td>3/6</td>
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<tr>
<td>College of Engineering</td>
<td>3/20</td>
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<td>College of Arts &amp; Architecture</td>
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<tr>
<td>College of Health &amp; Human Services</td>
<td>4/3</td>
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<tr>
<td>Information &amp; Technology Services</td>
<td>4/17</td>
</tr>
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</table>

- Training will be scheduled the week prior to your go-live date.
- View complete [Implementation Timeline](#)
Kronos Resources

Website

*Kronos Timekeeping Project*

FAQs

https://faq.uncc.edu

Roll-out

*Status*
● **Independent Contractor (IC): Designation**
  ○ Governed by the Internal Revenue Service (IRS)
    ■ Render services during a specified time period; unsupervised
    ■ Typically have expertise, professional knowledge, or particular set of skills not available elsewhere within the University (e.g., consultants)
    ■ Not entitled to employee benefits or covered by workers compensation

● **Hiring an IC: Contracting Process & Procedures**
  ○ Complete [Independent Contractor/Employee Checklist](#)
    ■ If Tax Office determines the individual is an employee, the hiring supervisor will be notified to follow regular HR hiring procedures
  ○ Create a contract, get signed, and submit to Purchasing
    ■ Select either the [Personal Services Agreement Template](#) or the standard [Contract Template](#), based upon the work to be performed.
  ○ Submit *General Services* requisition in 49er Mart, attaching above docs
Honoraria

- One-time payment to non-employee for participation in an activity that does not legally require a fee
  - Not a contractual obligation to pay for services rendered

- May not be used:
  - In cases where there is a predetermined, legally required fee
  - As a payment for specified services rendered by either an independent contractor or a University employee (including temporary teaching, part-time employment)
  - As an award to an individual where the primary intent is to confer distinction on, or to symbolize respect, esteem, or admiration for the recipient
  - Solely as a reimbursement in lieu of undocumented expenses
THANK YOU!!