Business Update

May 4, 2017
Agenda

Enrollment Management
➢ Niner Central – Student ‘One-Stop-Shop’ – Fall 2017

Information Technology Services (ITS)
➢ Client Engagement – FAQ.uncc.edu

Business Affairs
➢ Crisis Communication Planning Efforts

Internal Audit
➢ 2017/2018 Audit Plan

Human Resources
➢ Performance Management: FY18 Work Plans
➢ Benefits

Financial Services
➢ Payroll/HR-related Reminders
➢ New eForms & Year End Reminders
Enrollment Management Update

Tina McEntire
Associate Provost
Ext. 7-7019
Cato 120

Kimberly W. Laney
Director of Niner Central
Ext. 7-1342
kwlaney@uncc.edu
Cone Center 310C
NINER CENTRAL
BUSINESS UPDATE

April 2017
Agenda

- Mission
- Goals
- Timeline
- Staffing Structure
- Hours of Operation
- Questions
Niner Central simplifies access to University services for 49ers and their families. We partner to create lifelong connections and deliver world class service that is convenient, courteous and responsive.

- Web-enabled and simplified services for navigating management of registration, financial aid and student accounts
- Professional, equipped, knowledgeable and dedicated staff
- Robust campus partnerships and effective data management
- Proactive and continuous improvement focus
Student Focused Goals

Create a new culture of world class, student-focused service

- *Putting ourselves in student’s shoes*

Utilize holistic approach to accurately resolve multiple student issues

- *Cross-training staff to assist students with multiple cross-departmental issues*

Minimize referrals to other administrative offices on campus

- *Eliminating the ping-pong effect*

Help students easily and efficiently navigate many student services

- *Empowering students to fully utilize online services*

Improve technology tools to empower students

- *Offering 24/7 online services*

Streamline business processes
Leadership

- New Director of Niner Central
  - Kimberly Laney
- Project Champions
  - Dr. Dubois and Dr. Lorden
- Steering Committee:
  - Tina McEntire-Associate Provost, Enrollment Mgmt
  - Patrick Versace-Asst. Vice Chancellor for Enterprise Applications, ITS
  - Laura Williams-Controller, Business Affairs
- Consultant: Nancy Sinsabaugh
- Project Manager: Katie Ramstack
Operations Planning Group (OPG)

- Katie Ramstack (Project Manager)
- Bruce Blackmon (Financial Aid)
- James Birkett (Graduate School)
- Diane Bizzell (ITS)
- Alyson Ebaugh (Human Resources)
- Chris Garcia (Call Center)
- Kathryn Horne (Facilities)
- Chris Knauer (Registrar)
- Lisa Meckley (Enrollment Management Communications)
- David McIntosh (ITS)
- Heather Vetzner (Student Accounts)

Subcommittees:
- Virtual Redesign
- Space
- Business Process Redesign
- Human Resources
- Change Management
- Communications
Niner Central Planning Timeline

- **June-August 2016**
  - Planning kickoff with OPG

- **Aug-Feb**
  - Committee and subcommittees met regularly
  - Benchmarking research, site visits, best practice readings completed
  - Created service list and structure for the center

- **Feb-Mar**
  - Completed 5-year budget
  - Completed job descriptions
  - CRM demo
  - Hired new Director

- **April-May**
  - Post positions to home offices & campus
  - Conduct Interviews
  - Make job offers & finalize staffing
  - Finalize training documentation

- **June-July**
  - Finalize renovation design with architects
  - Beginning training
  - Start construction

- **Aug-Oct**
  - Training, training, and more training
  - Communicate to campus upcoming opening and advertise services to students

- **Nov**
  - LAUNCH NINER CENTRAL!
Niner Central Staffing Structure

- Call Center will merge and become part of Niner Central
- Staff of 21 staff members (including 6 Call Center Staff)
- Staffing priority will be given to staff in home offices and second priority will be given to internal campus staff, if needed.
- Staff will remain in home offices, but will participate in training 3-6 hours per week and will join Niner Central permanently in September.
Hours of Operation/ When & Where

Niner Central Hours:
8:00 am - 6:00 pm Mon-Fri
(additional flexible hours during peak times TBD)

Target Launch: November of 2017
Location: Cone- Candy Counter
Updates

Please check back at our project website: enrollment.uncc.edu/niner-central
ITS Client Engagement Update

Beth Rugg
Assistant Vice Chancellor Client Engagement
Ext. 7-6118
Kennedy
Does Your Department Receive...

Frequently Asked Questions (FAQs)?

● Improve Customer Service
● Improve Efficiency
Self Service Support

- **Goal:** provide answers to questions for customers to find on their own
- **Faq.uncc.edu**
- Available to community
- **Benefits**
  - Searchable
  - Key words
  - Easy to update, add screenshots, embed video
- **User group**
- **Contact Beth for more information**
Welcome!
You've reached UNC Charlotte's FAQ home page. Enter a question in the search box below or upper-right corner. Feel free by using the yellow suggest button. Note: Departments with FAQs are listed on the left-side of the screen; click the arrow but

Search for a Topic of Interest Below

[Search for a solution]

Browse By Topic
Sponsored Guests

● **Process**
  ○ Business Coordinator
  ○ Information Security Liaisons

● **Perceptive Content**

● **Citizens and International Guests**
Questions??
Business Affairs Update

UNC Charlotte Crisis Communications Planning Project

Christy Jackson
Director of Communications for Business Affairs
Ext. 7-5749
cjack113@uncc.edu

Chris Gonyar
Director of Emergency Management
Ext. 7-7884
cgonyar@uncc.edu
Project Overview

- Project began in *summer of 2016* as a way to develop an all-hazards crisis communications plan
- Includes *multi-departmental* planning teams
- Addresses communications for small incidents to larger emergencies
- Focuses on *family assistance*
- *Survey* was developed and submitted to students, faculty, staff, and families in November 2016
Survey Results

- Events that demand *action* are perceived to be better communicated than those that are just *informational*
  - Severe weather v. civil unrest
- Families desire *more frequent* communication and for *timeliness* to be improved
- *Email* is the preferred method for both emergency and non-emergency situations
  - Students, faculty, and staff also desire *text* in an *emergency requiring action*
Next Steps

● Operationalizing survey results
  ○ Stakeholder Group

● Implementation of NinerAlerts (Rave)
  ○ Results of April 19 test

● Developing process and roles

● This fall: communication and education for campus
Resources

emergency.uncc.edu
Questions??
Internal Audit Update

Raheel Qureshi
Auditor
Ext. 7-5698
Cato 337
# FY2018–FY2020 Audit Plan

## University Goal

<table>
<thead>
<tr>
<th>Goal 1</th>
<th>FY2018</th>
<th>FY2019</th>
<th>FY2020</th>
</tr>
</thead>
</table>
| Deliver a high-quality, accessible, affordable, and integrated academic experience that produces responsible global citizens and a competitive workforce. | Admin Review: College of Computing & Informatics  
- Institutional Research  
- Residency Classification | Admin Review: Cato College of Education  
Admin Review: Atkins Library | Admin Review:  
College of Arts + Architecture  
Admin Review: University College |

<table>
<thead>
<tr>
<th>Goal 2</th>
<th>FY2018</th>
<th>FY2019</th>
<th>FY2020</th>
</tr>
</thead>
</table>
| Stimulate increased research, creative activities, and community engagement with a focus on programs and partnerships that address the major needs of the Charlotte region. | Centers and Institutes | Vivarium Operations  
IRB/IACUC | Export Controls |
## FY2018-FY2020 Audit Plan

### University Goal

<table>
<thead>
<tr>
<th>Goal 3</th>
<th>Improve the readiness of human resources and our academic, administrative, physical, and technological infrastructure to efficiently and responsibly operate an urban research university serving 35,000 students.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FY2018</strong></td>
<td><strong>FY2019</strong></td>
</tr>
<tr>
<td>- IT security - DRP</td>
<td>- IT security-related topic TBD</td>
</tr>
<tr>
<td>- Capital Construction Contracting</td>
<td>- Information Privacy</td>
</tr>
<tr>
<td>- PCI Compliance</td>
<td>- FERPA</td>
</tr>
<tr>
<td></td>
<td>- HIPAA</td>
</tr>
<tr>
<td></td>
<td>- GLBA</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Goal 4</th>
<th>Improve significantly the base of supplemental non-state revenues for academic programs, administrative support, physical facilities, and student development, particularly need-based student financial aid.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FY2018</strong></td>
<td><strong>FY2019</strong></td>
</tr>
<tr>
<td>- Scholarships / Restricted Gifts</td>
<td>- Treasury Services – gift accounting</td>
</tr>
</tbody>
</table>
## FY2018–FY2020 Audit Plan

<table>
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<tr>
<th>University Goal</th>
<th>FY2018</th>
<th>FY2019</th>
<th>FY2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal 5</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Enhance
opportunities for learning and working together in a socially and culturally diverse world. | ● International Programs Business Office Operations |        | ● ELTI |
| **Goal 6**      |        |        |        |
| Enhance the quality of campus life and the collegiate experience for students and other members of the campus community, both on-campus and in adjacent University City neighborhoods. | ● NCAA compliance: - Football Attendance - Rules Education - Building Access Controls and 49er Card - Dean of Students operations - Minors on Campus | ● NCAA compliance: - Football Attendance - Amateurism - Official Visits Policy (every 4 years) - Auxiliary Services Contracts - Food Service - Bookstore - Vending - Repro Services | ● NCAA Compliance: - Football Attendance - Governance and Organization - Student Health Center - Title IX program |

*UNC CHARLOTTE*
## FY2018-FY2020 Audit Plan

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<thead>
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<th>University Goal</th>
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<th>FY2019</th>
<th>FY2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal 7</strong> Build local, state, and national awareness of and respect for the work of the University and its people.</td>
<td>Alumni Affairs</td>
<td>Early College High School support</td>
<td>Advancement Division Business Operations Web Communications and Social Media</td>
</tr>
<tr>
<td><strong>Goal 8</strong> Operational Basics University processes that are foundational to all University operations.</td>
<td>Internal Audit QAR</td>
<td>University Governance Committees Chancellor’s Office</td>
<td>Parking Mail Services</td>
</tr>
</tbody>
</table>
## FY2018–FY2020 Audit Plan

### University Goal

<table>
<thead>
<tr>
<th>In-house</th>
<th>FY2018</th>
<th>FY2019</th>
<th>FY2020</th>
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<tr>
<td></td>
<td>17</td>
<td>16</td>
<td>15</td>
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<table>
<thead>
<tr>
<th>Outsourced</th>
<th>FY2018</th>
<th>FY2019</th>
<th>FY2020</th>
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<tbody>
<tr>
<td>Space for unplanned</td>
<td>0</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

### By Division

<table>
<thead>
<tr>
<th>Division</th>
<th>FY2018</th>
<th>FY2019</th>
<th>FY2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROVOST</td>
<td>3</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>VCBA</td>
<td>4</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>VCSA</td>
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<td></td>
<td>1</td>
</tr>
<tr>
<td>VCUA</td>
<td>1</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>VCIT</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>VCREDS</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>ATHLETICS</td>
<td>2</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>VCII</td>
<td>0</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>
Questions??
Human Resources Updates & Reminders

Paulette Russell
Human Resources Consultant
Ext. 7-0660
King 113

Krissy Kaylor
Benefits Director
Ext. 7-0649
King 202A
Reminder: FY18 Performance NinerTalent STAKES

<table>
<thead>
<tr>
<th>Performance Period</th>
<th>April 1 – March 31, 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Plan</td>
<td><strong>Due by TBD</strong></td>
</tr>
<tr>
<td>(formerly Work Plan)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 Institutional Goals (50%)</td>
</tr>
<tr>
<td></td>
<td>3-5 Individual Goals (50%)</td>
</tr>
<tr>
<td></td>
<td>Weighted, not Prioritized</td>
</tr>
<tr>
<td></td>
<td>Rating Scale (1-3)</td>
</tr>
</tbody>
</table>

**Frequently Asked Questions…**
- What will feed into the new plan?
- What should I do with my old SMART Goals?
- Explain old SMART Goals vs. new Individual Goals.
State Health Plan Changes – Eff. 1/1/18

● Elimination of Consumer Directed Health plan
  ○ HRA balances will not roll over to 2018 for current participants

● Freezing premium for Family coverage tier
  ○ Not inclusive of enrollee/children, nor enrollee/spouse tiers

● Reducing Wellness credits from 3 to 1
  ○ Keeping Tobacco Attestation credit ($60)
  ○ Removing Health Assessment & Primary Care Provider credits

● Setting Employee-only base premiums to:
  ○ Traditional 70/30 Plan $25 per month
  ○ Enhanced 80/20 Plan $50 per month
  (includes the wellness credit)
State Health Plan Changes – Eff. Now

● Maternity incentive program, Stork Rewards not available for new enrollees, maternity coaching still available
● No longer subsidize the cost of the Diabetes Prevention Program and Eat Smart, Move More, Weigh Less (ESMMWL) for its members, lifestyle coaching and Diabetes Resource Center still available
Affordable Care Act (ACA)

Student employees

● Hired and reported as **part-time variable hour**
● Hours **not to exceed 20 per week** during the **academic year**, some **flexibility** to work more during the **summer**
● **If averaging FT (30+ hours per week)** over measurement periods, **offered coverage**
Affordable Care Act (ACA)

Temporary salaried workers (regardless of the FTE)
- Reported as full-time & offered coverage

Temporary hourly workers (eligibility based on FTE, regardless of duration of appointment)
- FTE .75+ (cumulative of all jobs) or measured full-time, offered coverage

Temporary faculty (FTE calculated - 3 work hours for every credit hour)
- FTE .75+ (cumulative of all jobs) or measured full-time, offered coverage
Benefits Reminders

- **FMLA**
- **Community Service Leave**
Coming Soon!

New Employee Benefits Webpage

● **Benefits Orientation Process**
  (Appointment/Agenda)

● **Resources**
  ○ Presentation
  ○ On-line packet
  ○ FAQs
  ○ Checklist

● **Effective dates and enrollment deadlines**

● **Contact**
Questions??
Financial Services
Updates & Reminders

Alicia Bartosch
Business Process Analyst
Ext. 7-0950
Reese 011D
Payroll/HR-Related Reminders

● **MCD Allowance Renewals**
  ○ Due by May 31

● **Bonus Leave Payout Option**
  ○ Complete the [Bonus Leave Payout Request](#) form by May 24
  ○ Paid out with June 15 payroll
  ○ Subject to all applicable taxes and retirement withholdings
  ○ Bonus leave paid at retirement can affect the calculation of your benefits. Contact Krissy Kaylor with questions.

● **Student & Temporary Employment Reminders**
  ○ Process Deadlines & Best Practices (in particular Fall Student employees)
“Process Deadline” Reminder

EPAFs must be submitted...

1. Prior to the employee's start date and
2. At least 7 business days prior to the end of the month

The hiring manager and employee will receive an email confirmation once Payroll setup is complete.
Student & Temporary Employees

Tip & Best Practices

1. Verify the EPAF transaction status is marked complete in the EPAF system
2. Submit new hire or reappointment paperwork for the fall prior to the start of the semester.
3. Consider starting fall student employees in September
For any Questions, Please Contact

Student Employment
Teresa Shook
tshook4@uncc.edu

Temporary Staff
Rachel Pierson-Bonin
rpierso1@uncc.edu
or
Jim Rodgers
drodger7@uncc.edu
New eForms

○ Fixed Assets - coming in May
  ○ See News Article
  ○ Training dates: May 3-5

○ Independent Contractor Checklist

○ P-Card Application

○ FTR - Budget Revisions
Year End Reminders

● **Budget Availability - General Funds**
  ○ Consider unencumbered transactions “in process”
    ■ P-Card expenses
    ■ Travel reimbursements
    ■ Future Payrolls

● **Disbursement Calendar**
  ○ P-Card cut-off - June 7
  ○ Other Payments & FTR submissions - June 19
  ○ Budget Revisions - June 16
  ○ Receiving entered in 49er Mart - Before noon June 30
  ○ Last checkwriter - noon on June 30
Questions??
THANK YOU!!

Next Business Update September 28

Check the Financial Services Calendar for details