Business Update

September 28, 2016
Agenda

- Welcome
- Budget Office
- Information Technology Services
- Human Resources
- Controller’s Office
- Questions/Open Discussion
Budget Office
Updates & Initiatives

Presented by:

Miriam Mason
Associate Budget Director
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Reese 316
Budget Office Organization: Update

Sherrie High, Director
Budgets and Financial Analysis

Miriam Mason, Assoc Director
General Fund and Personnel Budget Management

Carrie Smith, Budget Mgmt Accountant
General Fund

Hong Vu, Budget Mgmt Accountant
Personnel Budget Mgmt

Rebecca Harrison, Budget Technician
General Fund

Alice Patterson, Budget Technician
Personnel Budget Mgmt

John Adams, Budget Mgmt Accountant
Aux, Fee, and Capital Budgets

Vacant, Budget Analyst
Aux, Fee, and Capital Budgets
Budget Office: Reminders & Initiatives

• Upcoming Project...
  FTR – General Fund Budget Revisions…. (Tentatively On-Hold with New Target Date to begin in Mid-Late FY16-17)

• Budget Training & Open Lab…
  Budget: Understanding Your General Fund (to include information/training on Position Budgets) – November 15th
  Open Lab (for attendees of training only) – November 16th

• All Fund/Org changes should only be done as of 7/1 so that we can maintain clear historical records. Please submit by April 1st if at all possible.
Budget Office: Reminders & Initiatives

- Principles applicable to all fund types.....

  General Fund budgets are maintained by Budget Office and allocated annually at the Divisional level. Divisions allocate to College/Administrative Units, who further allocate to departments.

  For all other fund types, budgets are the responsibility of Department Heads and Fund Managers.

- FY17-19 Biennium Budget development is under way and due to OSBM by 10/31/16. This is in preparation for the Governor’s 2017-19 budget recommendation to the General Assembly.
Budget Office: Takeaways

• Budget Office is responsible for budget planning, execution and reporting for state General Funds, Auxiliaries and Student Fee funded operations; administering Capital Improvement budgets; and Position Budget Management.

• The NC General Assembly sets the statutes that dictate how state appropriated funds can be used. ("State Budget Act: NCGS 143")

• Guidance, forms and procedures in place to ensure the University maintains “special responsibility constituent institution” designation.

• Budgets should be realistic, reasonable and attainable!

• Available Budget should be monitored at least monthly and Budget Revisions prepared as needed.
Budget Office: Resources

Forms:
- Budget Revision (BD606)
- Budget Flexibility Revision (BD607)
- EHRA Payroll/Personnel Action Form (PD-7)
- Temporary Staff Employment Authorization (PD-17)

Training & FAQ’s:
- Budget: Understanding the General Fund

Policies/Manuals/Guides:
- University of North Carolina (UNC) System
  [http://www.northcarolina.edu/](http://www.northcarolina.edu/)
- Office of State Budget & Management (OSBM)
Information Technology Services Update

Beth Rugg
Assistant Vice Chancellor of Client Engagement
Ext. 7-6118
Kahoot Game

• Let’s get you engaged!

• Go to Kahoot.it on your phone

• Join the game by using the PIN provided
Direct Deposit Incident Update

• What happened?
• What was the impact?
• Why do we care?
  • $  
  • Risk
• What needs to change?
  • Two step verification for some Banner updates - implemented
  • New VPN for Banner INB users
  • Banner will not be available through Citrix - implications for Mac users
  • New request access for remote access
Other ITS Updates

- Two Factor Authentication
- Walk Up Service Desk
- WebEx
- Adobe Software
- Dropbox
- Dell catalog changes related to install services
- Unified Service Catalog Committee
- IT Governance under review
- Academic Affairs computer replacements - process under review
Human Resources Update

Tracy Worthey
Director of Staff Employment
Ext. 7–0670

Krissy Kaylor
Benefits Director
Ext. 7–0649
EPAF, What You Need to Know!

✓ Originator tab, look for Returned EPAF
✓ Approver tab, look for those that Need Approval
✓ Before setting the FTE, **ASK** students if they have, or will, work more than one job??

**Note:** EPAFs are for the initial work assignment only. A paper change form is required to make changes to approved assignments.

**New hires** = never worked at UNC Charlotte (Suffix = 00)
Affordable Care Act (ACA)

• Requires that we report correct FTE on all employees.
  • Students are limited to 20 hours a week.
  • Salary and stipend payments requires an FTE as well. Will have to use best estimate of how many hours of work they expected to put in each week.
    • Will have one off meetings with those student departments that still pay students by stipend.

• All employees hired to work 30 or more hours a week, regardless of duration will be offered coverage.

• More guidance and policies to come, as we continue to receive feedback from the data that is being submitted to the state.
.5% Bonus for all to be paid on the 10/15 payroll

Those eligible:

• SHRA permanent, probationary or time limited, full-time and part-time.
• EHRA Staff and Faculty, permanent, full-time and part-time (benefits eligible)
• Those employed as of 9/1/16
• Will be prorated for part-time and/or less than 12 month employees.
SHRA and EHRA Bonuses

Merit-based Bonus

**SHRA** permanent, probationary or time limited, full-time and part-time.

- To be paid on the **10/31 payroll**.
- Given to those that received a 3, 4 or 5.
  - One amount for 3 & 4 and another amount to 5 (TBD).
- **Eligibility** – must have been hired on or before 1/1/16. Must be an active employee as of 10/31/16 with no break in service. Will be prorated for part-time and/or less than 12 month employees.
- Those on approved leave of absence, must have performance review completed by 6/30/17.
**SHRA and EHRA Bonuses**

**Merit-based Bonus**

**EHRA Staff and Faculty**, permanent, full-time and part-time (benefits eligible)

- To be paid on the **11/30 payroll**.
- Employees may receive between 0 and 2% of base salary, capped at $2,500 for meritorious performance.
- **Eligibility** – must have been hired on or before 4/1/16 (must have six month of service as of 10/1/16). Must be in active employment statutes or on approved leave of absence, as of 11/30/16.
Insurance Open Enrollment
(October 1-31, 2016)

2017 Plan Year

WHAT'S NEW?

NEED HELP?

Mark Your Calendar
Insurance Open Enrollment
(October 1-31, 2016)

2017 Plan Year

State Health Plan
• Automatic Enrollment in 70/30 plan (If enrolled in a state health plan for 2016)
• Must take action for reduction in premium and to enroll in a different health plan
• Changes to the 70/30 and 80/20 Plans (deductible, coinsurance, copay)
• New pharmacy benefit manager for all plans—CVS Caremark
Insurance Open Enrollment
(October 1–31, 2016)

2017 Plan Year

NC Flex Programs
• Dental Plan – new vendor, slight rate change
• Group Term Life Insurance – options to add/enroll, slight employee rate decrease
• Core Accidental Death and Dismemberment Insurance - new vendor – Voya, coverage offered in $50K increments ($50,000 to $500,000), new rates
• Critical Illness Insurance - two options $15K & $25K, may enroll w/out medical evidence
• Cancer Plan -May enroll without medical evidence
Insurance Open Enrollment
(October 1–31, 2016)

How to Enroll:
Instructions to be provided in communication later this week

Call eligibility and enrollment support center
Phone: 855-859-0966
Hours: Monday–Friday: 8am–10pm ET and Saturday: 8 am–3 pm ET

On campus workshops
• Register to attend an on-campus workshop for help with questions and the on-line process
• Dates, times, registration link, and location: TBA
Insurance Open Enrollment
(October 1–31, 2016)

State Health Plan Telephone Town Hall Meeting
Thursday, September 29, 2016, 7:00 pm – 7:45 pm
On-line registration required: https://s hp.nctreasurer.com
Insurance Open Enrollment
(October 1–31, 2016)

Novant Health Breast Center mobile unit:
Thursday, October 20, 9:00am - 4:00pm SAC North Lot

Benefits Fair:
Tuesday, October 25, 10:30am-1:30pm SAC Salons

Flu Shot Clinics: Wednesday, November 9 & 17 2016
7:30am-3:00pm, Cone Center Lucas Room
Controller’s Office Updates

Alicia Bartosch
Business Process Analyst
Controller’s Office – Compliance
Ext. 7-0950

Greg Verret
Assistant Controller – Compliance
Ext. 7-5782
New Procedural Guidance

- “How to Pay” for Food & Beverage
- “How to Pay” Students
- “How to Pay” Individuals (Employees, Non-employees)
New Process/System – Reminders

Speed up Travel Reimbursements ≤ $500

- New Travel Forms Mandatory - (Excel Format Only)
- Do not convert to Google Sheets; Breaks Protections & Formulas
- Required for the Delegated Authority Travel Reimbursement Process (1-2 Business Day Turnaround)

Kronos is the System of Record for Leave Balances

- Not Banner Self-Service

Reporting Tools & Training Opportunities

- Report Central - Departmental Financial Reporting Dashboard (Enhanced)

Perceptive Content/ImageNow - Open Swims
Projects on the Horizon

Imaging Projects

- Travel Authorization
- Independent Contractor Checklist
- Fixed Asset Forms
- Banner Finance/49er Mart/Position Control/FSS Access Request Form
- P-Card Application/Change Form
- MCD Allowances Form
- Vendor information form
- E-commerce forms (access requests, merchant agreements)
- Imaging Document Submission form (IDS)
Projects on the Horizon

Systems

○ Expand 49erMart functionality to process additional payment requests
○ Next Banner XE (9) Upgrade - in Early Planning Stage - Stay tuned! More details at our next meeting.
THANK YOU!!

Next **Business Update**... December 8
Check the **Calendar** for details