Business Update

September 28, 2017
Agenda

Enrollment Management
➢ Niner Central Update

Financial Services
➢ Org Hierarchy Project
➢ FTR Enhancements - Coming Soon
➢ Budget Update
➢ New Electronic Check Request (eCR) Project

Information Technology Services (ITS)
➢ General Updates
➢ Imaging & Workflow Team: New Applications

Human Resources
➢ Benefits
➢ EHRA Non-Faculty Administration
Enrollment Management
Niner Central Update

Kimberly W. Laney
Director of Niner Central
Ext. 7-1342
kwlaney@uncc.edu
Cone Center 310C
Student Focused Goals

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

Utilize a holistic approach to resolve multiple student issues and minimize referrals to other administrative offices on campus

Help students navigate many student services

Improve technology tools and offer 24/7 online services to empower students

Streamline business processes
Enrollment Management - Niner Central

➢ Student-focused service delivery:
  □ Financial aid
  □ Billing & student accounts
  □ Registration & student records
  □ General inquiry

➢ Multiple channels
  □ Walk-in, Email, Phone
  □ Virtual/web-enabled
  □ 20 staff available 8:00 am - 6:00 pm Mon-Fri (flexible hours during peak times)
Niner Central Timeline

**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!

Please check our website for updates: enrollment.uncc.edu/niner-central
Financial Services Update

Laura Williams
Controller
Ext. 7-5756
4th Floor Reese

Carrie Smith
Budget Management Accountant - General Fund
Ext. 7-5003
3rd Floor Reese
New Faces

Student Affairs

● Vice Chancellor for Student Affairs
  ○ Dr. Kevin Bailey
  Learn more about Kevin...
New Faces

Business Affairs

• Associate Vice Chancellor for Finance
  ○ Anne Brown, CPA
  
  Learn more about Anne...
New Faces

Institutional Integrity

● Chief Audit Officer
  ○ Jennifer Walker, CPA, CIA, CFE
  Learn more about Jennifer...
# Org Hierarchy Project – ‘Discovery’ Phase

## Organization Head
- Chancellor, VC, AVC, Assoc. Provost, Dean, Director, Chair or similar position
- Has fiduciary responsibility, stewardship, and oversight
- Considered to be the financial manager of the organization

## Divisional Business Manager
- Carries out financial management responsibilities on behalf of the divisional leader (e.g., Vice Chancellor)
- Reports directly to Chancellor or a VC

## Business Officer
- Monitors and manages funds within a college or administrative unit
- Typically reports directly to a VC, AVC, Assoc. Provost, Dean, Director or Chair

## Fund Administrator
- Administers daily business operations within a sub-department(s) or for specific fund(s)
- Works directly with Business Officers

## Administrative Support Staff
- Assists department head, business officer, or fund administrator with office management responsibilities

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**Org Level 2**

**Org Level 3**

**Org Level 4/5**

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DRAFT
# FTR Enhancements

**Scope:** Existing FTR Form Types (e.g., Journal Entries, IDIs, PBR)

## What Changes to Expect?

| No More ‘Submission Error’ Notification Emails* | Front End Validation before submission  
  ○ except for Mass entries using csv files  
  ■ Error explanations appear on the screen |
|-----------------------------------------------|---------------------------------|
| User Friendly*                                |  ■ Ability to delete specific rows  
  ■ Scrolling field titles  
  ■ Name lookup feature  
  ■ Saving drafts                                      |
| Workflow                                      |  ■ Additional ‘Department Approver’ option                                     |
| Direct Feedback*                              |  ■ Task Approvers may enter comments that will appear in the Rejection email |

* These enhancements will apply to any future FTR form(s)
FTR Enhancements

When to Expect these Changes?

Testing/Feedback/Training

October 2 - 27

Transition

Early to Mid November

‘Live’ in Production

TBD

Open Swim Opportunities

October 9 - October 27
Monday, Wednesday, Friday
10am-12pm or 2pm-4pm
CHHS 386

Send Your Feedback to GeneralAccounting@uncc.edu
FTR Budget Revision Forms
Development In-Progress

3 New Transaction Types (Departmental)

- Budget Revision Form (General Funds)
- Position Budget Transfer Form
- GCA Budget Revision Form (Grant Funds)
FTR Budget Revision Forms

● Key Design Features
  ○ Front End Data Validation
  ○ Rule code driven automatically based on form selections
    ■ Temporary vs. Permanent
    ■ Account Code Choice
  ○ Approvers populated automatically based on initiator’s organization code
  ○ Fringe benefits amounts added and calculated automatically
FTR Budget Revision Forms

● Key Design Features
  ○ Coordination between funding actions in NinerTalent and budget actions in Banner
    ■ Reference/link to eforms in NinerTalent
    ■ FTR Budget Revision and NinerTalent Action will be routed forward simultaneously
    ■ No more scanning and uploading paper to NinerTalent
General Fund Budget Status

- **State Budget Bill**
  - Became law 6/28/17
  - No permanent budget reduction
    - (1st time since FY07)

- **$1,000 SHRA base salary increase**
  - Effective 7/1/17

- **State Retirement Contributions**
  - TSERS increased from 16.33% to **17.13%**
  - LEOB increased from 21.33% to **22.13%**
  - ORP remains at **13.03%**
General Fund Budget Status

● **State Health Plan**
  ○ Maximum annual employer contribution increased from $5,659 to $5,869.

● **Enrollment Funding**
  ○ Projected enrollment growth of UNC System fully funded for FY18 and FY19.
  ○ UNC Charlotte projected funding (appropriation and tuition) was $19.7M in FY18 and $10.5M in FY19, but will be distributed based on actual enrollment.
Reminder: Policy Update

● **UP 601.8 - Appropriate Use of University Funds**
  ○ Defined terms have been clarified
  ○ Reflects revisions of the North Carolina State Budget Manual
  ○ Five supplemental standards provide additional guidance

● **Appropriate Use of University Funds Standards**
  ○ Meals & Entertainment
  ○ Conferences & Events
  ○ Marketing & Development
  ○ Gifts, Awards, and Other Payments
  ○ Student-Oriented Activities

● **Allowable Fund Use Table**
NEW: electronic Check Request Project

● DPR (Non-PO Invoicing) Functionality in 49erMart
  ○ Move paper/imaging Direct Pay Requests (DPRs) to a single data entry point eCheck Requests (eCRs) in 49erMart with direct integration to Banner.

● Sponsored by Financial Services
  ○ Early stages: technical upgrades; data gathering.
  ○ eCR Project Team Members will be scheduling one-on-one meetings with unit Business Officers for their input.
  ○ Anticipated pilot or phased-in rollout beginning Jan 2018
  ○ For specific questions or comments, contact Elizabeth Palian, egpalian@uncc.edu.
Information Technology Services Update

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

Celeste Corpening
Applications Analyst
Ext. 7-7609
Kennedy
General ITS Updates

● Sponsored Guest Accounts process
  ○ Reference August 8 article

● OS upgrades

● File Storage Updates:
  ○ myfiles access to H/S/J going away 10/3; use VPN
  ○ Google and Dropbox Updates

● Governance and IT project update
General Updates

● Wifi expansion
  ○ Expected 150% Increase; Halton Arena upgrade expected to be completed this Fall

● Service Catalog - Coming soon!
  ○ A single, easy-to-navigate site to learn about all available resources, and who offers them
ITS - Imaging
New Applications Overview

Celeste M. Corpening
eForms

Eforms are a valuable tool to make our lives a little easier.

- Organize data
- Increase standardization and accountability
- Streamline campus processes
- Enhance approval processes
- Saves time
- Increase productivity
Financial Services
Purchasing Card Form

Preparer: 800011420 Corpening, Celeste
AccountHolder ID: 800011420 Corpening, Celeste

AccountHolder’s Current Cards:

<table>
<thead>
<tr>
<th>Select</th>
<th>Works Login Name</th>
<th>Application Created</th>
<th>Last Updated</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>O</td>
<td>cmcorpen</td>
<td>Thu Jun 22 18:18:12 2017</td>
<td>-</td>
<td>ACTIVE</td>
</tr>
</tbody>
</table>

Check all that apply:

- [ ] New Application and Agreement
- [ ] Change or Update Accountholder Name
- [ ] Close Purchasing Card Account
- [ ] Change Spend Control Profile
- [ ] Add or Change Approver
- [ ] Change Default Organization and/or Fund
- [ ] Add or Remove Organization
- [ ] Add or Change Reconciler

AccountHolder Info:

- **University ID:** 800011420
- **Name on Card:** Celeste M. Corpening
- **Job Title:** Bus & Tech Application Analyst
- **NinerNet ID:** cmcorpen
- **Spend Control Profile:** Select Profile
- **Department Name:** ITS Enterprise Applications
- **Phone Number:** 704-687-7609
- **Works Login Name:** cmcorpen

* indicates required field.
Approver Section

Please ensure you have reviewed the Purchasing Card Manual.

* AccountHolder: 800011420
  Corpening, Celeste

* Application Approver:

* PCARD Approver:

In most circumstances, the P-Card approver should be the supervisor of the accountholder or an individual delegated by such supervisor (not a direct report to the accountholder).

Add Another Approver

* PCARD Reconciler:

Add Another Reconciler

Submit Form  Reset and Submit Another
Documentation: Departmental

Human Resources

Forms:
- Mobile Communication Device (MCD) Allowance Form
- Mobile Communication Device (MCD) Allowance Form (TEST System)
- Employee Separation Form (TEST System)

Documentation:
- MCD Quick Guide
- How to submit an eMCD Allowance form?
- How does a Supervisor or Delegate approve an eMCD request?
- How to submit an Employee Separation Form? (New)
- Cheat Sheet – Attaching Supporting Documentation (New)
- Approving an Experience Approval Request User Manual (See FAQ)
Imaging Training

The Imaging and Workflow team has provided training materials for current and perspective users of the university document imaging solution. This documentation provides valuable training guides, departmental contact information, an overview of Perceptive Content, and Security / PCI Compliance procedures. For additional questions on how Perceptive Content can be used by your department, please contact ImageNowHelp@uncc.edu.

Scanner Brochure

- Recommended Scanner Guide

Manuals and Navigation Guides

- Single Click Access User Manual
- ImageNow (Client) - Navigation Manual
- Redacting a Document Guide
What’s New?

- Mobile Communication Device (MCD)
- Independent Contractor Checklist (ICC)
- Purchasing Card (Pcard)
- Financial Certification
- Employee Separation
Mobile Communication Device (MCD)

Use this form to request or renew a mobile communication device (MCD) allowance, per University Policy 317, “Mobile Communication Device Allowances,” Section III.

For New Allowance Requests

<table>
<thead>
<tr>
<th>HR Deadline</th>
<th>Effective Paycheck</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd of the Month</td>
<td>15th Paycheck</td>
</tr>
<tr>
<td>15th of the Month</td>
<td>EOM Paycheck</td>
</tr>
</tbody>
</table>

For Annual Renewals

<table>
<thead>
<tr>
<th>HR Deadline</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 31st</td>
<td>Upcoming fiscal year</td>
</tr>
</tbody>
</table>

- Fiscal year is from July 1 – June 30; Allowances will not be processed retroactively
- FAQs

Sponsor: Human Resources
Released May 2017
Independent Contractor Checklist (ICC)

Use this form to determine the appropriate classification of a service provider.

For tax purposes, a service provider is either an employee or an independent contractor.
- Employees are paid through Payroll
- Independent Contractor are paid through Accounts Payable
- FAQs

Sponsor: Financial Services (Tax Office)
taxoffice@uncc.edu
Released May 2017
Use this form to apply for a new purchasing card, make changes to existing account(s), or close a purchasing card.

A Pcard is a Bank of America credit card issued to those with authorization to make purchases on the behalf of UNC Charlotte.

- A one-hour training session is required for new accountholders.
- FAQ

Sponsor: Financial Services (Purchasing Card Office)
purchasingcard@uncc.edu
Released July 2017
Financial Certification

- The Financial Certification eForm must be completed by international students with F-1 or J-1 visa status.
  - It provides evidence of sufficient funds available for their studies in the United States.
  - It allows them to obtain an I-20 or DS-2019.

Sponsor: International Student and Scholar Office (ISSO)
Released August 2017
Employee Separation

- This form will be for resignations and separations from UNC Charlotte.

- If you are retiring from UNC Charlotte, review the Retirement Process and Resources on the Human Resources website.

- If changing positions within UNC Charlotte, contact the Benefits Office at benefits@uncc.edu or 704-687-8134.

Sponsor: Human Resources
In Development
Sneak Peek
Separating Employee Details

Separating Employee Details

Please note, the alternate phone number, email address, and current local mailing address is what we have on file for the employee. If the employee needs to make any changes, please go to My UNC Charlotte Banner Self Service to update this information, prior to the separation date. After the separation date, the employee will need to go to Legacy Banner Self Service to set up a Banner Self Service legacy account, to change their contact information.

*Employee ID: 800011420  Corpening, Celeste
Supervisor: 800660021  Weaver, Sugenia

*UNCC Phone: 704-687-7609
UNCC Email: CMCorpen@uncc.edu

*Alternate Phone: 704-604-2239
*Alternate Email: corpeningc@hotmail.com

*Forwarding Address:
6720 Pine Branch Ct
Charlotte, NC 28269-3562
Notice: Employee must be present on the last day of work.

*Last Day of Work: ____________________________  *Access Termination Date: ____________________________

Employee is resigning from the following positions:
☑ 008061 00 - Bus & Tech Application Analyst

*Reason for Separation: Choose Reason

Outstanding Items

The following items are outstanding for this employee. Please refer to the Employee/Supervisor Separation Checklist for any items that need to be reviewed prior to separation from UNC Charlotte.

☑ Employee May Have Active or Pending Purchasing Cards.
Task Approvals Made Easy

We've upgraded our system just to improve your user experience.
- No more Java and browser restrictions
- Document screen resolution improved for easier viewing

https://imagenow.uncc.edu/experience (or /webnow)

Anyone who approves eTAs, FTRs, MCDs, PCARDS, Fixed Assets, ICCs etc. will benefit from this enhancement.
Open Swims

Workflowforms.uncc.edu

Calendar

Email Notifications
Ways to Contact ITS - Imaging Team

Email
- ImageNowHelp@uncc.edu

Help Desk
- https://help.uncc.edu/CherwellService
- 704-687-5500

Imaging Website
- Workflowforms.uncc.edu
- Imaging
- Imaging Training
Human Resources Updates

Krissy Kaylor
Benefits Director
Ext. 7-0649
King 202A

Jeanne Madorin
Executive Director
Ext. 7-0659
King 113C

Sarah Ekis
EPA Non-Faculty Administration
Ext. 7-1433
King 113E
2018 Benefits – Open Enrollment

Highlights - State Health Plan

- Auto enrollment in 70/30 - if enrolled in the State Health Plan
  You must take action if you want the 80/20 plan
- Consumer Directed Health Plan - not offered 2018 plan year
- Only 1 wellness credit
  Complete tobacco attestation
- Plan and premium details
  Reference State Health Plan website
Highlights - NC Flex

Accident Plan
Benefits for specific injuries and events resulting from an accident

Health Care FSA
Contribution limit to $2,600
New rollover feature:
Replaces grace period feature for Health Care FSAs for this enrollment period - can rollover up to $500 of unused funds into the following plan year (minimum $25 balance)
2018 Benefits - Open Enrollment

Highlights - NC Flex

Dependent Day Care FSA
New NCFlex Convenience Card (eligible expenses up balance)

Vision - EyeMed-new vendor
Higher frame allowance ($200) and contact lens allowance ($175)

Critical Illness
No Evidence of Insurability (EOI) required to enroll

Cancer
No EOI (this year only) to enroll, unless lapse in coverage

Group Term Life
Increase by $20K, no health questions (up to guaranteed issue amt)
2018 Benefits - Open Enrollment

Resources

● 2018 Open Enrollment Highlighter

● State Health Plan

● NC Flex Enrollment Guide

● http://hr.uncc.edu/benefits

UNC Charlotte Open Enrollment Webpage - coming soon
2018 Benefits - Upcoming Events

- **October 3rd - Benefits Fair**
  Refreshments, insurance/retirement providers, flu shots and more
  10:30 AM - 1:30 PM
  Barnhardt Student Activity Center (SAC) Salons

- **October 10th - Staff Council Fall Festival Benefits Booth**

- **October 17th & November 28th - Flu Shot Clinics**
  7:30 AM - 3 PM
  Lucas Room, Cone Center

What’s true about the flu?
2018 Benefits - New Webpage

- New Employee Benefits Information
Conversion of FLSA Exempt SHRA IT Positions to EHRA

*Pending Final Guidance from UNC-GA expected within 30-45 days**

- **Why?**
  - To assist with Recruiting & Retention for IT positions Statewide

- **What to Expect?**
  - Expected to apply to FLSA Exempt positions within and external to ITS (approx. 180)
  - Employees in eligible positions will have the **OPTION** to convert to EHRA or remain SHRA
    - Meetings will be held to explain the differences (e.g., Leave, Benefits, etc.)
    - Will have time to make a decision
    - Job descriptions on positions converted will need to be entered into NinerTalent as EHRA
  - No salary changes expected as a result of this conversion
  - Eligible Vacant or New positions will be classified as EHRA

- **Send Questions to:**
  - Jeanne Madorin - jlmadori@uncc.edu, 7-0659
EHRA Non-Faculty

Other EHRA Non-Faculty Administration Topics

○ Annual Raise Process (ARP)
  ■ Increases were based on merit (direct any questions to your supervisor)
  ■ Business Officers will receive letters around Oct. 6 to distribute to employees
  ■ Increases will be reflected on the Oct. 15 paycheck

○ EHRA Non Faculty Salary Ranges (updated & available on UNC GA site)

○ Temporary or Interim increases
  ■ Submit modification action in NinerTalent
  ■ Process on PD7 as a Special Payment (no longer included in current salary)

○ Board of Governors Approval Required for...
  ■ Any cumulative increase of 5% or more, if salary is $100,000 or more, or increase causes salary to be $100,000 or more
  ■ New positions budgeted at $70,000 or more

○ Send Questions to:
  ■ Sarah Ekis - sekis@uncc.edu, 7-1433
Final Questions??
THANK YOU!!

Next Business Update TBD (Early 2018)

Check the Financial Services Calendar for details