Business Update

October 2, 2018
Emergency Information

1. Emergency Exits

2. Building Evacuation Assembly
   (Area of Rescue and Assembly location)

3. Emergency Contacts
   - Call Campus Police
   - From an Office Phone - 911
   - From a Cell Phone - (704) 687-2200
Today’s Agenda

Financial Services

- **Controller’s Office** - New faces, misc. reminders and works in progress, spring 2019 student payment due date change, pending changes to moving allowances

- **Financial Systems Support** - Electronic Check Request (eCR) project update
Today’s Agenda

Human Resources

● **Staff Employment** - EPAF certification
● **Benefits** - Open enrollment information for insurance

Information Technology Services

● **Client Engagement updates**
New Faces

Business Affairs

- Ken Smith, Budget Office Director
  Learn more about Ken…

- Melissa Leamon, Business Officer for Financial Services & Business Affairs (starts October 29, 2018)

- Kim Saunders, Payroll Manager
- Vicki Turman, Asst. Director of HR Systems Support
New Faces

*Business Affairs continued*

- Kathryn Horne, Interim Associate Vice Chancellor for Facilities Management
- Lee Snodgrass, Interim Associate Vice Chancellor for Safety and Security

[Learn more about Kathryn & Lee](#)
New Faces

Research and Economic Development

- Rick Tankersley, Interim Vice Chancellor
- Kelley Whall, Associate Director of Grants & Contracts
Upcoming Retirements

<table>
<thead>
<tr>
<th>Spring 2019</th>
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<tbody>
<tr>
<td>● Keith Wassum, Associate Vice Chancellor for Business Services</td>
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<tr>
<td>● Ron Sanders, Associate Controller for Accounting &amp; Disbursements</td>
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Controller’s Office Travel Reminders

Travel Office Restructure effective July 1st

Disbursements

Accounts Payable

Travel & Complex Payments

Vendor Relations

Jerri Painter, Disbursements Manager

Julie Hughes, VR Manager
Controller’s Office Travel Reminders

- TR is now TRER, Travel Reimbursement and Expense Report

Form name change
Controller’s Office Gift Certificate Webform

New! Gift Certificate Webform

- Updated [Gift Cards/Gift Certificates, How to Pay](#) procedures
- Reference this [news article](#) and communication sent this spring

Gift Certificate

Presented to: Test Recipient  From: Controller's Office
Date Issued: Fri, 07/13/2018

Gift certificate value  Gift Certificate VALID UNTIL Mon, 07/15/2019
$20.00

Bookstore cashier instructions: Charge fund 123456 at the time of purchase.

This gift certificate is only valid at the University Barnes & Noble Bookstores located in the Popp Martin Student Union.
The University of North Carolina at Charlotte, Business Affairs | 9201 University City Blvd | Charlotte, NC 28223
In the Works
Student Payment Due Date Change

Changing payment due dates for several reasons:

- To address stop-out research and cancellation data
- To eliminate the payment schedule compression due to the small 3-day window between the end of winter break and the payment due date
- To align with other UNC school best practices
- To facilitate an extended payment plan
- To allow for additional academic planning related to scheduling
Student Payment Due Date Change

- **Payment due date for spring will now be December 5th.** Students are accustomed to a January due date. Some students work over winter break to earn money to pay spring tuition.

- Payment due date for fall will move two weeks earlier from August 15th to August 5th.

- **SEA (Student Educational Award) Forms** need to be submitted by Nov. 15th.
Student Payment Due Date Change

Benefits to Students:

- **Goal: To better serve our students.**
- New 5-payment plan offers smaller payments spread out over time.
- No interest on payment plan.
- No down payment to set up a payment plan, just $55 fee.
- Payment action is due December 5th for spring semester, but first payment for payment plan is not due until December 31st.
- Students will have better access to staff prior to each payment due date because payment will be due prior to winter break.
- Allows for better academic planning because cancellation will occur earlier which provides additional capacity.
Moving Allowances: How we got to June (recap)

Moving Expense Reimbursement Form

- Excel form signed by supervisor
- Receipts required
- Processed through A/P; if taxable, passed to Payroll
- On average: 83% non-taxable / 17% taxable
- “Agreed upon” limits but no policy/guideline

Collaboration w/AABP & HR

- HR1 passed on 12/22/17
- Meetings starting in January
- Presented at:
  - Deans Council, 1/9
  - AA Bus Manager meeting, 2/20
  - Business Update, 2/28
- Communicated via email to all Business Officers, Fund Administrators, Financial Services (3/9 & 3/21); also included in F/S email re: tax reform (1/9 & 2/2)

Moving Allowance Procedures

- Web form with approval routing in Imaging
- No receipts required if less than $10k
- Processed through Payroll
- 100% taxable
- Published procedure and limits
Moving Allowances: How we got here

Moving Reimbursement/Allowance Form
- Two Imaging e-forms needed:
  - Pre-approval
  - Approval
- State funds or >$10k: Receipts required
- Processing: Same e-form, but workflow will differ depending on funding via State Funds or Discretionary (see next slide)
- Previously developed Moving Allowance Procedures will generally still be applicable for Discretionary Funding

Collaboration w/AABP & HR
- Meetings with AABP, HR, Controller’s Office, Budget, Internal Audit, FSS, & ITS starting July 11th

OSBM Policy Change
- Effective July 1st (agencies notified on July 3rd)
- Allows state funds to be used for new employees
- There are many requirements
- Pre-approval is required
- Chancellor approval is required
  - Cannot be delegated
- Still 100% taxable
Moving Allowances: Detriments of using State Funds

● Will require out-of-pocket expenses for new employee
  ○ Will likely take more than 1 month to process the reimbursement
  ○ Reimbursement is still taxable to the employee (will only receive approx. 64.85% of moving expenses incurred)

● Requirements are strict and cumbersome
  ○ Pre-approval required - must be submitted by employee; 3 bids required
  ○ Chancellor approval required
  ○ Documentation for all expenses being reimbursed is required
  ○ Since we are auditing against many specific requirements, the chances of being asked for additional documentation or requiring rework are high

● Need to be very clear with business staff and hiring managers up front that this process was purposely designed by the State to be a cumbersome, inefficient process
Moving Allowances: Next steps

- Approval through Cabinet
- Develop e-forms
- Update procedures
- Goal “go live” date is Jan. 1, 2019
- Communicate to campus; previous channels:
  - Academic Affairs Business Managers meetings
  - Deans Council
  - Cabinet
  - Business Updates & Business Advisory Panel
  - Emails to business staff
Electronic Check Request (eCR) Project Update

Project Team Members:
Elizabeth Palian, Denice Ferguson, Jerri Painter,
Julie Hughes, Scott Brechtel, Lisa Dooley
Electronic Check Requests

Project Status

- We are continuing to work on implementing the Electronic Check Request (eCR) form in 49er Mart.

After-the-fact (ATF) Purchase → Electronic Check Request (eCR)
Human Resources Updates
Staff Employment

Tracy Worthey
Ext. 7-0670
Electronic Personnel Action Form (EPAF) Certification

EPAF Training in canvas

Compass: Pass Canvas EPAF Training

Goal: Gain EPAF Access

Boost user confidence & ease hiring process

Coming Spring 2019
Insurance Open Enrollment

Employee **Insurance Open Enrollment** has begun!

- When: Sept. 29 - Oct. 31, 2018
Insurance Open Enrollment

Employee Insurance Login

eBenefits

Click login to eBenefits and enter your NinerNet credentials to view, enroll, or change your health and/or NC Flex benefits.

NEW: eBenefits Mobile App

Resources:
- Plan information
- New employee benefits
- Life events
- Family Medical Leave
- Retirement
- Separation of employment

Contact:

UNC Charlotte Benefits Office:
benefits@uncc.edu / 704-687-8134
Brandon DeLeeuw and Season Jamison, ITS Fall Update 2018
WHAT'S YOUR IDEA?
HAVE A NEED? LET'S TALK!
See Process

TRACK A PROJECT
WANT DETAILS?
28 Projects in Implementation Phase

- University Managed Print Program and Solution
- PATH
- Part of Term Implementation
IT Connect Workshops:
Register Today!

Gmail
Learn how to navigate, search, organize, use keyboard shortcuts and more in Gmail.
Workshops August 20-24.

Screen casting
Get familiar with Camtasia to create on-screen recordings for the classroom or other projects.
Workshops August 13-15.

File Collaboration
Learn about Google Team Drive, a file sharing option for groups who work together regularly.
Webinar August 16.

File Collaboration
Learn about Dropbox Team Folders, another file sharing option for groups who work together regularly.
Webinar August 17.
Questions?