Today’s Agenda

Information Technology Services (ITS)
❖ General updates (e.g., IT Governance, security, Banner 8, IT Assessment, email aliases, and Duo self-enrollment)

Business Services
❖ Light rail arrives March 16!

Human Resources
❖ Learning & Organizational Development - Professional Administrator Certification
❖ Student Employment Postings
Today’s Agenda Cont’d.

Human Resources, cont’d.
- Benefits - Community Service Leave & New Employee Orientation
- Hiring process (veterans)

Financial Services
- Budget Office - Financial Transaction Requests ("FTRs")
- Financial Systems Support - Electronic Check Request (eCR) Project
- Controller’s Office - Policy updates, and tax reform
ITS Updates

Beth Rugg, Associate Vice Chancellor Client Engagement
Ext. 7-6118
Kennedy
IT Governance is...

The process that ensures the **EFFECTIVE & EFFICIENT** use of IT in enabling UNC Charlotte to achieve its goals.
Task Force Recommendations

Listening to Campus
Gaining visibility into campus-wide technology needs

Talking to Community
Increasing campus awareness of ITS services

Corralling Purchasing
Structuring the campus technology marketplace
More Details

Feedback
Allow customers to provide easy feedback

Transparency
Increase campus involvement through Technology Portfolio Committees (TPCs)

Awareness
Create a clear, comprehensive website that provides detailed information

Communication
Involve community in process often, early and continuously

ETC
Establish steering committee senior divisional leaders

Impact
Weigh cumulative impact of ALL projects into deadlines

User Acceptance
Analyze the customer’s experience

Assessment
Evaluate each project post-implementation

Submissions
Simple process designed to identify IDEAs

Service Catalog
Track ALL services in the IT Service Catalog

Review
Solicit feedback from TPCs

Cost Projections
Project 5-year direct & indirect costs
Macro and Micro Assessments provide the ETC and ETC Divisional Reps key information about IT project impact.
NEW Technology Portfolio Committees

Academic Services
Advices on teaching, learning & research services including LMS & classroom technology

Administrative Services
Advices on administrative & business services including faculty & student information systems

Computing & Access
Advices on device computing & access management services including printing and software

Communication & Collaboration
Advices on communication & collaboration services including conferencing, email, file sharing
Result

MAKING INFORMED IT DECISIONS

UNC CHARLOTTE
Other IT Updates

• Desktop/Laptop Security
• Banner 8
• IT Assessment
• Spring Break work
• Email aliases coming soon!
• Duo self enrollment coming soon!
Light Rail Arrives
March 16th

Doug Lape
Director, Parking and Transportation Services
2/28/18

UNC CHARLOTTE
CATS Blue Line Extension

- Train will arrive on campus over 100 times each day
- 26 total stations
- 11 new stations on alignment
- CATS buses connect at several LYNX stations
- Train arrives every 15 minutes during non-peak hours, and 20-30 minutes during late night hours and on weekends
|     | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
|-----|---|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| **16 DAYS UNTIL LIGHT RAIL ARRIVES** | **MARCH 2018** |

**UNC CHARLOTTE**
Connecting to Campus

• BLE Alignment Overview

UNC Charlotte Main station

JW Clay/UNC Charlotte station

9th Street station
CATS Bus Routes

• CATS bus routes connect at many light rail stations

• Multiple routes connect at JW Clay/UNC Charlotte station

• Connecting service to CK Rider (Concord/Kannapolis)  
  – additional fare may be required

• CATS will announce schedule closer to BLE opening
CATS All-Access Transit Pass – Students

- Pass includes access to CATS LYNX light rail, streetcar, local and express bus routes. Includes Airport Sprinter and Airport Connector routes.
- Spring 2018 pass is $10 and is part of student’s tuition and fees via the Miscellaneous Transportation Service Charge (MTSC)
- Passes are active from March 16th through August 14th
- Passes for the 2018-2019 academic year:
  - Semester pass is $25 and is part of student’s tuition and fees via the MTSC
CATS All-Access Transit Pass – Faculty/Staff

• Faculty and Staff can purchase the same transit privileges
  • Pass includes access to CATS LYNX light rail, streetcar, local and express bus routes. Includes Airport Sprinter and Airport Connector routes.

• Spring 2018 pass is $50 and can be purchased via payroll deduction or credit card

• Passes go on sale February 21st and are active from March 16th through August 14th

• Passes are NOT REFUNDABLE
CATS All-Access Transit Pass – Faculty/Staff

• Beginning July 1st, you can purchase passes for the 2018-2019 academic year
  • Semester pass is $50
  • Annual pass is $75

• If you purchase from CATS, the same privileges are $1,056 per year

• Things to know:
  • If you purchase a pass for the 2018-2019 academic year and leave the University, your transit privileges will be turned off.
  • Passes DO NOT include parking at CATS J.W. Clay/UNC Charlotte and University City Boulevard parking decks.
CATS All-Access Transit Pass – Faculty/Staff

- Purchase Pass by visiting: mypark.uncc.edu
Using Your 49er ID Card

• There is no need to purchase a ticket. Your CATS privileges are tied to your 49er ID Card.
• To ride light rail, show your ID card when asked by a CATS fare inspector.
• On a CATS bus, tap your card on the contactless reader when you enter.
• In late 2018, CATS will install contactless readers on all LYNX trains where you will tap your card to validate your ride.
Group Ticket Purchases

- Group tickets can be purchased through CATS using P-card
- No discount is currently provided. Round trip ticket is $4.40
- More information will come from Controller's Office on reimbursements for light rail tickets
How will campus transit connect?

• PaTS is adjusting Niner Transit schedules to connect you to and from light rail stations and your campus destination.
• Gold and Green lines stop at the UNC Charlotte Main station, and the Silver line stops at the CRI Deck approximately every 8 minutes.
• Available 21 hours on weekdays and 18 hours on weekends
Safety

• Safety measures have been put in place by CATS and UNC Charlotte on the train, at stations and in areas surrounding stations.
• UNC Charlotte Main station has security cameras, extra lighting and blue light phones
• Additional Police and Public Safety officers have been hired and will patrol area around UNC Charlotte Main station during peak travel times and at night
• PPS has direct access to cameras on the UNC Charlotte Main station and will monitor footage
• Remember, do not hold residence hall doors open for anyone
  • We anticipate more foot traffic near Wallis Hall and surrounding area with the opening of light rail.
  • With students connecting with Niner Transit from light rail stops to residence halls, this is important throughout campus
Staying Safe Near the Rail

- Individuals have been seen ducking under closed gates when light rail trains are approaching
- Safety starts NOW!
- Gates are required to come down 20 seconds before the train enters the crossing.
- Trains always have the right of way and travel 35-55 mph
  - Trains require 400-500 feet to stop once they observe someone in the crossing.
  - There is not 400-500 feet available for a train to stop when it exits the tunnel near Institute Circle.
- WAIT FOR THE GATES TO OPEN TO CROSS!!!
STOP! Light Rail Vehicle Approaching!

Do not try to beat the crossing gates!
- Light rail vehicles are traveling 35-55 mph
- They require 400-500 feet to stop!
Be a Smart Rider

- CATS has a Rider Code of Conduct everyone must follow
  - Violations may result in issuance of a civil penalty of $50 or arrest.
- 49er ID Cards just became more valuable—protect them!
  - Your ID card/transit pass can only be used by you
  - If lost, report it to the 49er Card Office
  - If caught by CATS with someone else’s ID Card, it may be confiscated.
Help Inform Students

• Need more information? Visit lightrail.uncc.edu
  • Everything you need to know about light rail’s arrival to campus is here

• Have questions?
  • Send them to lightrail@uncc.edu

• Talk about light rail’s arrival. Its just around the corner and we want all students to know about this new transit option and the all-access transit pass

• Encourage students to ride the rail- new opportunities, places to explore, access to arts, culture, entertainment and more

• Encourage good behavior at stations and on the train. Remember, CATS and PPS can see everything!
What’s Next?

Campus Wide Celebration

MARCH 16
10:00 AM
Questions?

lightrail@uncc.edu

Doug Lape
Parking and Transportation Services
7-0162
dlape@uncc.edu
Human Resources Updates

Krista Collins, Learning & Organizational Development Specialist
Ext. 7-0665, King

Tracy Worthey, Director
Ext. 7-0670, King 222G

Krissy Kaylor, Benefits Director
Ext. 7-0649, King

Gary Stinnett, Associate Vice Chancellor HR
Ext. 7-0643, King
Professional Administrator Certification (PAC)
Presented by Krista Collins
Purpose

• The purpose of the Professional Administrator Certification program is to strengthen the depth and quality of administrative staff support at UNC Charlotte
Benefits

• Increased institutional knowledge
• Increased understanding of UNC Charlotte, UNC System, and NC State policies and procedures
• Improved networking capabilities and opportunities for collaboration
• Increased skills in targeted technical and functional business needs
• Enhanced communication and leadership skills
• Informed and empowered administrative workforce
Program Highlights

• ASPIRE Certificate program - promotes institutional knowledge and leadership growth

• Workshops – promote enrollment in 14 required in-person workshops, 5 required online/on-demand workshops, and 5 hours of elective software training strategically selected by the participant and their supervisor

• Forums – promote institutional knowledge and leadership with the attendance of 2 - ADMIN-Forum sessions each year (4 total) and 1 - 49er Mart Forum session each year (2 total)

• Online Learning – offers an online Cohort in Canvas that includes Blended Learning solutions for busy employees
Canvas at UNC Charlotte

- Adopted by UNC Charlotte in the Spring of 2016 replacing the Moodle Learning Management System
- Allows the freedom and independence of completing PAC requirements on the participant’s own schedule
- Organized using the Modules system
- Allows the PAC participant to upload and submit PAC requirements online as completed, print documents, and access information
- Allows the instructor to stay connected to PAC cohort participants throughout the entire two-year process
Timeline

• Participants have two years to complete the program once joining a cohort

• Participants will have completed 19 required in-person and online workshops, 5 required elective software training courses, 4 -Admin-Forums, and 2 - 49er Mart Forums

• Participants should plan strategically
Supervisor’s Role

- A supervisor’s commitment and support is crucial as a key stakeholder in the completion of this certificate program
- A participant should begin an open discussion about including PAC in annual work plans
- “Running records” of PAC accomplishments should be included in one-on-one meetings
Participants Join A Cohort By

- Meeting with the supervisor to complete the PAC Cohort Enrollment Form
- Contacting HRTraining@uncc.edu to be enrolled in the Canvas online cohort
- Checking UNC Charlotte Gmail and accepting the Canvas course invitation
- Uploading the PAC Cohort Enrollment Form to the correct assignment in the Canvas ASSIGNMENTS module
- Registering for required workshops
- Completing a Skills Assessment to determine system/software proficiency level
- Meeting with the supervisor to review the Skills Assessment and select elective system/software training to complete
- Beginning! Attending workshops, completing online-trainings, attending ADMIN-Forum sessions and 49er Mart Forum Sessions, and completing and submitting assignments to Canvas
Questions?

Krista Collins, UNC Charlotte Learning and Organizational Development

King 226, kcolli45@uncc.edu, or call 7-7688
Student Employment Postings

Michelle Wann, University Career Center
Tracy Worthey, Human Resources
Student Employment Postings
Moving from NinerTALENT to Hire-A-Niner

❖ Why the Change
➢ Create an early relationship between students and the Career Center
➢ Present features to search on student factors
➢ Dedicated resources to assist departmental coordinators
➢ Free up the Student Employment office to focus on processing assignments quicker
MANAGERS

LOGIN

You will login using your normal NinerNet credentials as you would for any other campus service.

PROBLEMS?

Please file a support request.

https://hireaniner.uncc.edu/
Job Postings

Attention:

Note: You will be notified as your job approaches expiration and provided an opportunity to extend the posting.

Note: Job expiration date will be automatically adjusted to maximum allowed - 90 days after the posting date.

Please Note: On-Campus Recruiting (OCR) positions should be entered in the On-Campus Recruiting (OCR) section.

Position Information

Copy or Repost Position
Pick a position from which you would like to copy data. Please review and edit your job title when copying a job.

Position Type *

- Full-Time
- Part-Time
- Temporary
- Internship
- Co-op
- DSI Internship
- On-Campus Employment (UNC Charlotte Departments Only)
  - On-Campus Experience Type *
    - Federal Work Study
# Pending Actions Summary

<table>
<thead>
<tr>
<th>Action</th>
<th>Count</th>
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</thead>
<tbody>
<tr>
<td>New Employer Registrations</td>
<td>11</td>
</tr>
<tr>
<td>New Job Postings</td>
<td>24</td>
</tr>
<tr>
<td>New OCR Schedule Requests</td>
<td>0</td>
</tr>
<tr>
<td>Pending Schedules</td>
<td>0</td>
</tr>
<tr>
<td>New Recruiting Event Request</td>
<td>1</td>
</tr>
<tr>
<td>Pending OneStop Registrations</td>
<td>1</td>
</tr>
<tr>
<td>Pending OneStop Employer Updates</td>
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</tr>
</tbody>
</table>

# Event Registration Summary

<table>
<thead>
<tr>
<th>Event</th>
<th>Approved</th>
<th>Pending</th>
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</thead>
<tbody>
<tr>
<td>Careers in Computing Networking Night 2018</td>
<td>13</td>
<td>0</td>
</tr>
<tr>
<td>Education Career Fair 2019</td>
<td>107</td>
<td>0</td>
</tr>
<tr>
<td>Etiquette Dinner 2018</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Liberal Arts &amp; Sciences Summit 2018</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Research Triangle Park Career Trek 2018</td>
<td>20</td>
<td>0</td>
</tr>
<tr>
<td>Spring Career &amp; Internship Fair 2018</td>
<td>251</td>
<td>0</td>
</tr>
<tr>
<td>Summer Employment Expo 2018</td>
<td>35</td>
<td>0</td>
</tr>
<tr>
<td>Job Title</td>
<td>ID</td>
<td>Location</td>
</tr>
<tr>
<td>-----------------------------------------------------------</td>
<td>------</td>
<td>-------------------</td>
</tr>
<tr>
<td>UPIP: Operations Manager / Music Librarian (Percussion)</td>
<td>32582</td>
<td>Charlotte, North Carolina</td>
</tr>
<tr>
<td>UPIP: Community Garden Director</td>
<td>33121</td>
<td>Charlotte, North Carolina</td>
</tr>
<tr>
<td>UPIP: Jamil Niner Student Pantry Communications and Outreach Intern</td>
<td>33118</td>
<td>Charlotte, North Carolina</td>
</tr>
<tr>
<td>UPIP: TV Communications Assistant (Fall 2018/Spring 2019)</td>
<td>32540</td>
<td>Charlotte, North Carolina</td>
</tr>
<tr>
<td>UPIP: Operations Manager / Music Librarian (Percussion)</td>
<td>32582</td>
<td>Charlotte, North Carolina</td>
</tr>
</tbody>
</table>
## Student Job Postings

### Sample Pay Scale

<table>
<thead>
<tr>
<th>Job Class</th>
<th>Minimum</th>
<th>Median</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Assistant</td>
<td>$7.50</td>
<td>$8.85</td>
<td>$12.00</td>
</tr>
<tr>
<td>Tutor</td>
<td>$8.00</td>
<td>$10.00</td>
<td>$15.00</td>
</tr>
<tr>
<td>Grader</td>
<td>$8.00</td>
<td>$13.50</td>
<td>$15.00</td>
</tr>
<tr>
<td>Event Staff</td>
<td>$8.10</td>
<td>$9.00</td>
<td>$15.00</td>
</tr>
<tr>
<td>Lab Worker</td>
<td>$7.50</td>
<td>$9.25</td>
<td>$13.50</td>
</tr>
<tr>
<td>Technology</td>
<td>$7.50</td>
<td>$9.80</td>
<td>$15.00</td>
</tr>
<tr>
<td>Sales/Marketing/Communication</td>
<td>$7.25</td>
<td>$10.00</td>
<td>$12.00</td>
</tr>
<tr>
<td>Preceptor</td>
<td>$8.00</td>
<td>$9.30</td>
<td>$10.00</td>
</tr>
<tr>
<td>Library Aid</td>
<td>$7.50</td>
<td>$8.75</td>
<td>$10.50</td>
</tr>
<tr>
<td>Undergraduate Research Assistant</td>
<td>$8.00</td>
<td>$10.00</td>
<td>$12.00</td>
</tr>
<tr>
<td>Monitor</td>
<td>$8.00</td>
<td>$10.00</td>
<td>$12.00</td>
</tr>
<tr>
<td>Customer Service Representative</td>
<td>$8.00</td>
<td>$9.00</td>
<td>$11.00</td>
</tr>
<tr>
<td>Building Services</td>
<td>$7.65</td>
<td>$9.50</td>
<td>$12.00</td>
</tr>
<tr>
<td>Fitness</td>
<td>$7.65</td>
<td>$9.75</td>
<td>$13.50</td>
</tr>
<tr>
<td>Tour Guide</td>
<td>$9.00</td>
<td>$10.00</td>
<td>$11.00</td>
</tr>
</tbody>
</table>
### Sample Job Description

<table>
<thead>
<tr>
<th>Title</th>
<th>Minimum</th>
<th>Median</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Assistant</td>
<td>File paperwork, sort mail, put together packets</td>
<td>Greet visitors to office, answer phones</td>
<td>Responds to emails, schedule appointments</td>
</tr>
<tr>
<td>Tutor</td>
<td>Entry level classes</td>
<td>Mid level or basic major classes</td>
<td>Advanced majors classes and specialized subjects</td>
</tr>
<tr>
<td>Lab Worker</td>
<td>Clean test tubes and equipment</td>
<td>Assist students and instructor with experiments</td>
<td>Run lab with little assistance, answer questions, troubleshoot problems with equipment</td>
</tr>
</tbody>
</table>
Student Job Postings

Next Steps

❖ Establish and promote training sessions for Hire-A-Niner system
❖ Put together a focus group to define pay scale and job descriptions
❖ Start change communication plan to departments and students
❖ Faculty/Staff will begin creating their contact registration March 1
Benefits Updates

Krissy Kaylor, Benefits Director

Questions

• Contact Krissy Kaylor kstaffo1@uncc.edu / 704-687-0649
Community Service Leave Refresher

Guidance for CSL entries in Kronos

❖ Reporting (comments section)
  ➢ List the full name of the organization, instead of acronyms
  ➢ Indicate if the organization is a 501(c)(3)
  ➢ Provide a description of the volunteer service provided
Community Service Leave Refresher

❖ Eligibility Reminders
  ➢ Only enter CSL meeting eligibility within the state guidelines (also reference PIM 46)
  ➢ Volunteer work at an eligible organization must benefit the citizens of NC to be eligible for CSL
  ➢ College tours/orientation/graduations for your children are not eligible for CSL

Note: Use civil leave if you have jury duty, instead of CSL
New Employees

Orientation

❖ Help educate employees about benefits prior to orientation

➢ Employees provided NEO information 1 week and 1 day from orientation, to include benefits online resources:

■ University of North Carolina Benefits Overview

■ New Employee Benefits Page
New Employees

❖ In Process
   ➢ Packet / presentation will be updated
   ➢ Potential open swim sessions to help with enrollment
   ➢ Implementation of Single Sign On (SSO) to use NinerNET credentials to make insurance elections this year
Hiring Process

Gary Stinnett, Associate Vice Chancellor HR

Veteran Job Applicants

Office of Federal Contracts and Compliance Programs (OFCCP) audit
Financial Services Updates

Hong Vu, Budget Management Accountant - General Fund
Ext. 7-5003, 3rd Floor Reese

Elizabeth Palian, Asst. Director - Financial Systems Support
Ext. 7-0282, 4th Floor Reese

Robyn Diehm, Asst. Controller - Tax & Payroll
Ext. 7-5819, 3rd Floor Reese

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

Student Affairs

- Dr. Aaron J. Hart, Associate Vice Chancellor for Housing & Residence Life
Electronic Check Requests

Elizabeth Palian
Asst. Director - Financial Systems Support

Project Team Members:
Elizabeth Palian, Denice Ferguson, Jerri Painter, Julie Hughes, Scott Brechtel, Lisa Dooley, and John Schroeder
Electronic Check Requests ("eCR")

Paper / Imaging Direct Pay Requests ("DPR")

Single data entry point, eCRs in 49er Mart with validation, approval workflow, and direct integration to Banner
Electronic Check Requests

Project Status

❖ Technical and configuration changes 75% complete
❖ Ongoing meetings with unit Business Officers for input
❖ Beta transactions and pilot groups beginning “now.”

Contact

❖ Contact any member of the eCR project team with questions.
Budget FTR Forms

Hong Vu, Budget Management Accountant - General Fund
Sarah Ekis, EHRA Non-Faculty Human Resources Consultant
Budget FTR Forms

3 New Transaction Types

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

Timeline

Testing/Training  Live in production  Paper form retired

Fall 2017  Jan. 17, 2018  Mar. 1, 2018

Remaining Open Swim Sessions

- March 8, 2-4 pm
- March 22, 10 am - 12 pm

Location: CHHS 386

Sign-up sheet
Budget FTRs

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
Budget FTRs

Key Design Features Cont’d.

❖ 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
Budget FTRs

Stats Since Rolled Out

- 20+ departments have used Budget Revision FTRs (E-Budget Revision)
- 150 E-Budget Revisions submitted (Permanent and Temporary)
- 300+ transactions posted to Banner from 1/17-2/16/18
- Several technical modifications made by ITS
Budget FTRs

NinerTalent FTR Connection

- EHRA NinerTalent and the E-Budget Revision (Sarah Ekis)
- SHRA NinerTalent and the E-Budget Revision
  - No user impact
Budget FTRs

NinerTalent links to Budget FTRs
Added Routing for New Position Requests

Initiator
- Enters proposed position information

Budget Approval
- Assigns new position number

Initiator
- Enters position details

Approver
- Reviews position details

Human Resources
- Reviews, sets salary range, etc.

Budget Approval
- Activates position in Banner
EHRA Non-Faculty NinerTalent Changes

New Tab - Proposed Position Information

Proposal Position Information

- Proposed Position Title: Assistant Director
- Required Information
- Fund Number(s)
- Proposed Salary Range
- Position Number
EHRA Non-Faculty NinerTalent Changes

❖ Budget will assign a position number once the proposed position information has been entered.
❖ Please note, that the proposed salary range is what will be budgeted for in the position. This is not the Human Resources approved salary range. The HR Approved Salary range will show up on the approved position description on the HR Use Only Tab.
❖ There is no change in the process for “Modify Position Description Actions.”
University Policy Update - Pending

Robyn Diehm
Asst. Controller - Tax & Payroll
University Policy Updates - Reminder

Flexible Work and Telework Arrangements for SHRA and EHRA Non-faculty Employees, UP 101.22

- Section C.9, Out-of-state Income Taxes
  - Hiring preference for in-state employees when all other factors are equal
  - Consult Tax Office before hiring, contracting with, or allowing a new telework agreement with any employee who will be working for the University outside of North Carolina.
    - We will rely on business officers and staff to be aware of this guidance.
    - Due diligence approach
University Policy Updates - Reminder

➢ These arrangements may introduce additional state tax withholding and reporting, as well as unemployment insurance, requirements. Any time the Tax Office does not know about these arrangements ahead of time, penalties, interest and/or late fees may accrue.

➢ There may be pass-through costs to departments related to complying with out-of-state tax/UI requirements

Direct Deposit of Pay, **UP 602.1**
Other Policy & Misc. Updates

Laura Williams, Controller
Travel Policy Updates

Tips and Gratuity
❖ The maximum tip when using a taxi or car service = no more than $5 per trip.

Meals (Section 5.1.13)
❖ This section has been deleted to comply with federal IRS policies, and, as a result, breakfast and dinner reimbursements are no longer allowed during travel that does not involve an overnight stay.
Travel Policy Updates

Refreshments
❖ The limit for refreshments (i.e., coffee, soft drinks, snacks) provided during board meetings, training sessions, and conferences increased from $4.50 to $5.00 per participant per day.

Transportation by Common Carrier
❖ Reimbursement is allowed for coach fare seat assignment fees and is limited to actual costs substantiated by a receipt.
Travel Policy Updates

Transportation by Personal Vehicle

❖ If travelers use a personal vehicle for state business and the round-trip mileage does not exceed 100 miles per trip, they will be reimbursed the business standard mileage rate set by the IRS (54.5 cents per mile effective as of Jan. 1, 2018).

❖ If travelers use a personal vehicle and the round-trip mileage exceeds 100 miles per trip, they will be reimbursed 33 cents per mile for all miles.

*Miles per day is not a consideration anymore when determining the mileage reimbursement rate.*
Travel Policy Updates

New policies effective Jan. 1, 2018

❖ The Travel Office will accept the previous version of the travel forms until Mar. 1.

For more information, check out this article.
## University Policy Update - Pending

### Gifts, Awards, and Prizes,

**UP 101.18**, Clarification of **tangible personal property definition**

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**University Policy 101.18**

**APPENDIX A**

**Thresholds for Reportable**

<table>
<thead>
<tr>
<th>Type of Gift, Award, or Prize</th>
<th>Threshold for Reportable Per Person Amount</th>
<th>Tax Reporting if Amount Exceeded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Cash Awards and Gifts Includes gift cards</td>
<td>$0</td>
<td>Include on W-2</td>
</tr>
<tr>
<td>Employee <strong>Non-Cash</strong> Awards and Gifts²:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Length of Service</td>
<td>$400</td>
<td>A</td>
</tr>
<tr>
<td>Retirement</td>
<td>$400</td>
<td>A</td>
</tr>
<tr>
<td>Safety Achievement</td>
<td>$400</td>
<td>A</td>
</tr>
<tr>
<td>Recognition</td>
<td>$100</td>
<td>B</td>
</tr>
<tr>
<td>Prizes, Incentives, and Other Gifts</td>
<td>$100</td>
<td>B</td>
</tr>
<tr>
<td>Sympathy or Congratulatory Gifts</td>
<td>$125</td>
<td>B</td>
</tr>
<tr>
<td>Non-employee Awards and Gifts²</td>
<td>$600</td>
<td>B</td>
</tr>
</tbody>
</table>

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**Tax Reporting Requirements if Amounts are Exceeded:**

A. If the cost or value of the award or gift exceeds the limit, the *amount in excess of the limit* is taxable and must be reported to the Tax Office.

B. If the cost or value of the award or gift exceeds the limit, the *entire amount* is taxable and must be reported to the Tax Office.
University Policy Updates - Reminder

Standard for Marketing and Development

❖ Minor revisions added to clarify the Appropriate Use of University Funds

Marketing Standard (Standard A)

A. Advertising, Marketing, and Promotional Items:

1. For purposes of this standard on fund usage, "Advertising, Marketing, and Promotional Items" includes, but is not limited to, items such as advertising space, pens, pencils, erasers, water bottles, coffee mugs, ties, scarves, and key chains. It does not include informational documents and notices and signage for instructional activities, student support services, student activities, or faculty or staff recruitment; these expenses are not subject to the fund usage limitations described here.

2. Discretionary funds may be used for advertising, marketing, and promotional expenses.

3. General Funds, Institutional Trust Funds, and Special Funds can only be used for advertising, marketing, and promotional expenses if appropriated or received for this purpose (per OSBM Budget Manual, Section 4.10).

   1. Acceptable fund sources for advertising, marketing, and promotional items include graduate tuition increments, student fees, extension instruction fees, and sales and services revenues.

   2. These funds may be used to purchase articles of clothing only if they meet a security or safety need; prior approval from the University Budget Office is required for any purpose unrelated to safety/security.
Tax Reform
Moving Allowances
❖ As of January 1, 2018, moving expense reimbursements are fully taxable. This is a result of the federal tax reform bill signed into law on December 22, 2017.
❖ A new Moving Allowance eForm will go live mid-March
❖ Look for a communication on this in March
Questions
Thank you!

Next **Business Update** April 25 (save the date!)

Check the **Financial Services Calendar** for details