Weekly Status Call

March 5, 2020
## Training Courses

**Budget Planning & Salary Setting (BPSS)**

<table>
<thead>
<tr>
<th>Course:</th>
<th>Format:</th>
<th>Date/Time:</th>
<th>Registration:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policies and Procedures</td>
<td>Interactive Webinar</td>
<td>March 6</td>
<td>Register</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10:00 a.m. - 12:00 p.m.</td>
<td></td>
</tr>
<tr>
<td>Policies and Procedures</td>
<td>In-Person</td>
<td>March 25</td>
<td>Register via PEP</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2:00 p.m. - 4:00 p.m.</td>
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</tr>
<tr>
<td>*System Training</td>
<td>In-Person</td>
<td>March 10</td>
<td>Register via PEP</td>
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<tr>
<td></td>
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<td>8:30 a.m. - 11:30 a.m.</td>
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<tr>
<td>*System Training</td>
<td>In-Person</td>
<td>April 8</td>
<td>Register via PEP</td>
</tr>
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<td></td>
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<td>8:30 a.m. - 11:30 a.m.</td>
<td></td>
</tr>
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*Budget Management System access required*
# Training Courses

## Financial Management

<table>
<thead>
<tr>
<th>Course:</th>
<th>Format:</th>
<th>Date/Time:</th>
<th>Registration:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working with GL Journals</td>
<td>Interactive Webinar</td>
<td>March 18 1:30 p.m. – 3:30 p.m.</td>
<td>Register</td>
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<tr>
<td>Working with GL Journals</td>
<td>Interactive Webinar</td>
<td>April 6 1:30 p.m. – 3:30 p.m.</td>
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<tr>
<td>Intro to Study Away Financial Management</td>
<td>Interactive Webinar</td>
<td>March 10 8:30 a.m. – 10:30 a.m.</td>
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<tr>
<td>Principles of Study Away Financial Management</td>
<td>Interactive Webinar</td>
<td>March 18 8:30 a.m. – 10:30 a.m.</td>
<td>Register</td>
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# Training Courses

## Sponsored Projects

<table>
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<tr>
<th>Course:</th>
<th>Format:</th>
<th>Date/Time:</th>
<th>Registration:</th>
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</thead>
<tbody>
<tr>
<td><strong>Introduction to Sponsored Projects</strong></td>
<td>In-Person</td>
<td>March 11, 9:00 a.m. - March 12, 4:00 p.m.</td>
<td>Register in PEP</td>
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<tr>
<td><strong>Introduction to Sponsored Projects</strong></td>
<td>In-Person</td>
<td>April 28, 9:00 a.m. - April 29, 4:00 p.m.</td>
<td>Register in PEP</td>
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<tr>
<td><strong>Introduction to Sponsored Projects</strong></td>
<td>In-Person</td>
<td>May 11, 9:00 a.m. - May 12, 4:00 p.m.</td>
<td>Register in PEP</td>
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</table>

<table>
<thead>
<tr>
<th>Course:</th>
<th>Format:</th>
<th>Date/Time:</th>
<th>Where:</th>
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</thead>
<tbody>
<tr>
<td><strong>GRASP Course 4</strong></td>
<td>In-Person or Webinar</td>
<td>April 22 9:00 a.m. - 12:00 p.m.</td>
<td>T&amp;D Room C &amp; Webinar: Register</td>
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Training Courses

**EITS**

<table>
<thead>
<tr>
<th>Course:</th>
<th>Format:</th>
<th>Date/Time:</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>Tech Basics</td>
<td>In-Person</td>
<td>March 19</td>
<td>T&amp;D Room</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10:00 a.m. – 11:30 a.m.</td>
<td>AB: Register</td>
</tr>
</tbody>
</table>

- **Tech Basics**: An in-person class where new/current faculty and staff can get assistance enrolling a backup device in ArchPass, downloading Office 365, syncing mail accounts and more. Registrants should bring their personal devices, as university-issued computers will not be worked on during this class. **The deadline to register is March 16.**
## Training Courses

### Reminder

<table>
<thead>
<tr>
<th>Course:</th>
<th>Information:</th>
</tr>
</thead>
</table>
| **UGAJobs**                                  | • Available to units by request. *Central HR will come to you!*  
• Email hrweb@uga.edu to make the request for your unit.                                                                                           |
| **P-Card (online!)**                         | • Located on the [Procurement site](#)  
• Initial P-Card Training  
• Refresher P-Card Training  
• Procurement Card Information                                                                                                                     |
| **Sponsored Projects Administration (SPA)** | • An abundance of new SPA trainings can be found on the [SPA training calendar](#) and registered for through [PEP](#).                                                                                  |
| **Express Direct Retros**                    | • Overview of the Express Direct Retro functionality within OneUSG Connect.  
• Available on the [OneSource Training page](#) for System Managers.                                                                           |
Employee Self Service
OneUSG Connect Unavailability

• During OneUSG Connect downtimes, employees will not be able to access employee self-service, including electronic copies of their W-2.

• This may be especially impactful since tax season and the upcoming March downtimes coincide.

**Important OneUSG Connect Downtimes:**

• Friday, 3/13/20 (6:00 p.m.) – Wednesday, 3/18/20 (7:00 a.m.)
• Friday, 3/27/20 (6:00 p.m.) – Tuesday, 3/31/20 (7:00 a.m.)

Printable Flyer Available now on the [OneSource website](#)!
Fiscal Master Calendar
Upcoming Downtimes/Updates

Access the Fiscal Master Calendar for additional dates and information!
Each year, UGA is required by USG Policy to reaffirm the necessity of user access to core information systems. Our compliance with this user account verification process is audited and reported to the Regents and the State each year.


You must complete the user account verification process, including your supervisor’s response by April 30, 2020.

If you do not complete the process, your access to these systems will be revoked.

To get started beginning March 23, you will login into your JIRA dashboard at jira.eits.uga.edu.

Systems included:
- Banner and Financial Aid System
- Financial Management System
- Budget Management System
- UGAJobs
- OneUSG Connect
OneSource Weekly Status Calls
Extended to FY20 End

• OneSource Weekly Status Calls have been extended through Thursday, June 25, 2020.

• Current registrants will receive a notification following today’s Weekly Status Call.

• We encourage you to share the registration link with others who might benefit from participating each week. Spread the word!
Fiscal Year End
Town Hall

• Georgia Center, Masters Hall
• Thursday, March 26th
• 1:30 - 3:00PM

• NO Status Call this day

Registration:
• In person (RSVP requested, not required)
• Online Zoom Meeting (RSVP requested, not required)
• Look under NEWS on the OneSource webpage
Financials, Budgets, Reporting

March 5, 2020
Accounts Payable
Payment Request – DBA Search Field

BSAG Enhancement Request Update

• On the Fluid Payment Request Center, you will have a new DBA Search Field!
  • This search field will only yield results for suppliers that have a DBA name listed on their supplier profile.
  • The search field is sensitive to characters
    • Example: Searching for "Chickfila" will not yield any suppliers. You can search either by "Chick" or "Chick-Fil-A" to yield results.
• Slated for the March Release
Travel and Expenses

International Travel Notification

BSAG Enhancement Request Update

• On the Travel Authorization Creation Page you will see an important note regarding International Travel.
  • A direct link will be included where travelers can go to register their itineraries for their upcoming international travel.
  • Slated for the March Release
Travel and Expenses
Trip Cancellations

• Related information is outlined in the FAQs found in the Travel Policy here.
  • UGA will reimburse for the airfare and/or penalty incurred for a change or cancellation of travel plans when the change or cancellation is required by the State of Georgia or is the result of other unavoidable situations approved by a UGA department.
  • For hotel reservations, in unavoidable situations where all reasonable efforts have been taken to resolve cancellation fees with the hotel, and a fee is still charged, include an explanation when submitting the expense report.
Travel and Expenses

Trip Cancellations

- If your trip is canceled and you booked your airfare through one of UGA's authorized travel agencies:
  - If you purchased a nonrefundable fare, the travel agency will not issue a credit.
  - If you choose to move the travel to a later date, please contact the travel agency involved and discuss change fee charges.
  - If you purchased your ticket through one of UGA's authorized travel agencies and the airline has discontinued or suspended flights to your destination, please contact the travel agency for assistance, as the airline may offer waivers or waive change fees for travelers that have tickets to the destination.
Travel and Expenses
Canceled/Altered Travel Expense Process

• **Processing Reimbursements:**
  - Please use the **O – Other Misc. Expenses** expense type (account code 727100)
    - It is important these reimbursements not be coded under any travel expense types (64xxxx account code series) if no travel occurred due to TIGA reporting.
  - Your description should reference the business reason for the need to alter travel arrangements: Ex. Trip cancelled due to conference being canceled.
  - Please also reference your approved TA with your expense report
  - Accounts Payable can assist you with how to process reimbursement requests; however, we can't offer guidance or advice on whether or not to cancel travel plans. Travelers should work with their school/college/division to determine how to proceed.
Grants Management

New Sponsored Project Budget Template

• **Issue:** Budget discrepancies on sponsored projects were noted as a major challenge that needs action.

• **Solution:** New project budget templates are now available to resolve this issue.

• **Where to find:** These templates can be found in the Grants Tool Box (Budget Tools menu) on the SPA webpage. Budget Templates are to be included at proposal submission in the Grants Portal: Proposal Docs > Proposal Budget.
# Grants Management

## New Sponsored Project Budget Template

![Budget Template Image](image-url)

**PS / SPONSOR PROPOSAL BUDGET WORKSHEET**

Please complete the cost share information at the bottom of the page, if applicable.

<table>
<thead>
<tr>
<th>ITEM</th>
<th>Sponsor Funding</th>
<th>Cost Share or Match*</th>
<th>Over The Cap</th>
<th>TOTAL PROJECT BUDGET</th>
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<tbody>
<tr>
<td>Personnel</td>
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<tr>
<td>Salary</td>
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<tr>
<td>510000 Per Serv Faculty (Budget)</td>
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<tr>
<td>522000 Salaries Staff (Budget)</td>
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<td>550000 Pers Svcs Fringe Ben (Bud)</td>
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<td>Total Personnel</td>
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<tr>
<td>Capital Equipment</td>
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<tr>
<td>800000 Capital Equipment over $5,000</td>
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<tr>
<td>Total Capital Equipment</td>
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<tr>
<td>Travel</td>
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<tr>
<td>641000 Travel - Employee and Non-Employee (budget)</td>
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</tr>
<tr>
<td>641200 International Travel - Employee and Non-Employee</td>
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<tr>
<td>641290 International Travel - Employee - VISAPAS</td>
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</tr>
<tr>
<td>Total Travel</td>
<td></td>
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</tbody>
</table>
Grants Management/Accounting

New Incentives Account Code

- **Account 727105 - Research Subject Incentives (New!)** is used for incentives (cash, gift cards, etc.) to motivate human subjects’ participation. F&A (IDC) is usually collected on incentives.

- **Account 751111 - Grant Participant-Subsistence** is used for participant support costs – subsistence allowances, travel allowances and registration fees paid to participants or trainees (not employees) in connection with a conference or training project. Participant support costs are only allowable as a direct cost with the prior approval of the federal awarding agency. F&A (IDC) is not collected on participant support costs.

- **Existing Projects**: SPA is auditing existing projects and will reach out to units who are impacted by this change.
Grants Management/Accounting

Long Descriptions Updated

- Long Descriptions have been updated to better reflect the account codes above in accounting.

- **727105** - Includes incentives (cash, gift cards, etc.) provided to motivate individuals to participate in a grant/state-supported project/program or an instruction, research, or public service project or study.

- **751111** - Subsistence, travel allowances, or registration fees paid to participants/trainees (not employees) in connection with a conference or training project related to a sponsored project when the sponsored project requires segregation of expenses.

- **751112** – Grant Participant Support Other: Includes all other expenses paid to participants/trainees (not employees) in connection with a conference or training project related to a sponsored project when the sponsored project requires segregation of expenses.
New Combo Rules Effective March 1, 2020

• New Fund/Class combo rules have been added.
• Refer to OneSource Training Library for a copy of the Chart of Accounts Code Structure document.
  • Provides specific visual of what Funds and Classes can be used together.

• Anomalies
  • Any old anomalies that were not corrected before February month end
    ~OR~
  • Any new anomalies that post from transactions created prior to March 1, 2020.
  • Must submit a OneSource Help Desk Ticket that identifies the anomaly transaction (full chartstring) AND corrected chartstring transaction should be moved to.
On Tuesday, March 3, it was reported that the BPSS chartstring is not showing data or cannot be budgeted for account code 600000.

There is no original or current budget to view.

Employees will not be able to use any BPSS chartstring reports until the issue is resolved.

All other Hyperion reports and data appear unaffected by this.

For additional details and updates, please visit the Known Issues page or contact the OneSource Service Desk at onesource@uga.edu or 706-542-0202.
On Tuesday, March 3, it was confirmed that certain BPSS reports are not running to success.

- Combo Code Budgets
- Combo Code Budgets (Full Chartstrings)
- Position Funding Distribution
- Position Funding Distribution (Full Chartstring)

These reports will be removed and replaced with new reports as soon as possible.

For additional details and updates, please visit the Known Issues page or contact the OneSource Service Desk at onesource@uga.edu or 706-542-0202.
Budget Management

New Reports (ASAP)

• Position Funding Data
  • Single Department
  • All Departments
  • By Combo Code

• Salary Data
  • Single Department
  • All Departments

• Position Funding and Salary Data Spreadsheet
Data Warehouse
Monthly Status Report

• The Monthly Status Report (MSR) is now available publicly on OIR's Operational Reports page.

• This report was designed to be a static report that could be used for balancing purposes and is set up in a Fund by Department format.

• **Best Practice**: Even if you use this report throughout the month, for a historical snapshot of the month it's important to re-run this report after the month has been officially closed.

• Training on running this report can be found in the Training Library.

• Questions and/or enhancement requests related to this report should be submitted to onesource@uga.edu.
## Monthly Status Report

- **Department Group:**
- **Fiscal Year:** 2020
- **Accounting Period:** FY2020 - September

<table>
<thead>
<tr>
<th>Fund Code</th>
<th>Department</th>
<th>Rev/Expense</th>
<th>Account Level 2</th>
<th>Current Budget</th>
<th>Encumbrance</th>
<th>Monthly Actuals</th>
<th>Actuals to Date</th>
<th>Remaining</th>
<th>Estimated Revenue</th>
<th>Recognized Revenue</th>
<th>Estimated Recognized Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000 - RI State Appropriations</td>
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<tr>
<td>Expense</td>
<td>500000 - Personal Services Expe.</td>
<td>$61,645.07</td>
<td>$48,494.25</td>
<td>$2,866.05</td>
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<tr>
<td></td>
<td>700000 - Op Supplies &amp; Expenses</td>
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<td>$4,658.40</td>
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<td></td>
<td>Department Total</td>
<td>$119,763.07</td>
<td>$48,496.83</td>
<td>$4,658.40</td>
<td>$11,975.53</td>
<td>$59,290.71</td>
<td>$0.00</td>
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<tr>
<td>10500 - Tuition</td>
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<tr>
<td>Expense</td>
<td>500000 - Personal Services Expe.</td>
<td>$2,803,595.64</td>
<td>$2,065,807.93</td>
<td>$225,855.71</td>
<td>$704,884.03</td>
<td>$32,903.68</td>
<td>$0.00</td>
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<tr>
<td></td>
<td>700000 - Op Supplies &amp; Expenses</td>
<td>$2,803,595.64</td>
<td>$2,065,807.93</td>
<td>$225,855.71</td>
<td>$704,884.03</td>
<td>$32,903.68</td>
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<td>Rev/Expense Total</td>
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<td>$2,065,807.93</td>
<td>$225,855.71</td>
<td>$704,884.03</td>
<td>$32,903.68</td>
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<tr>
<td></td>
<td>Department Total</td>
<td>$2,803,595.64</td>
<td>$2,065,807.93</td>
<td>$225,855.71</td>
<td>$704,884.03</td>
<td>$32,903.68</td>
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</tbody>
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### Data Warehouse
#### Monthly Status Report

**Detail Tab**

<table>
<thead>
<tr>
<th>Acct Tree 2</th>
<th>Date</th>
<th>KK Tran Type</th>
<th>PS ID</th>
<th>Supplier</th>
<th>PS Desc</th>
<th>UGA Ref</th>
<th>GL Account</th>
<th>Fund</th>
<th>Program</th>
<th>Dept Code</th>
<th>Class</th>
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</thead>
<tbody>
<tr>
<td>500000 - Personal Services Expense</td>
<td>9/2/2019</td>
<td>GL Budget E..</td>
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<td>Benefit Budg.. #NA</td>
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<td>11200</td>
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<td>9/2/2019</td>
<td>GL Budget E..</td>
<td>BEN0000001</td>
<td>#NA</td>
<td>Benefit Budg.. #NA</td>
<td>551100</td>
<td>10000</td>
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<td>9/2/2019</td>
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<td>Benefit Budg.. #NA</td>
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<td>Benefit Budg.. #NA</td>
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<td>10000</td>
<td>14600</td>
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<td>Benefit Budg.. #NA</td>
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<th>Oper Unit</th>
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<th>Actuals to Date</th>
<th>Monthly Actuals</th>
<th>Remaining</th>
<th>Estimated Reve..</th>
<th>Recognized Reve.</th>
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<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
Users can click on and select any of the columns with amounts to "keep only" or "exclude" - this functionality can help to create a cleaner report.

This can also be done on the "Detail" tab.
• The MSR defaults to *Fiscal Yr 2020* and *Budget_Ref_Descr 2020* – this excludes out transactions processed on prior year funds.

• If you would like to view those transactions, you can change your *Bud Ref* filter.
Department Groups:

- Note: If you select multiple Department Groups they will still be displayed in a Fund by Department format, but it will not be possible to determine which Department Group an individual department belongs to.

- For information about what departments make up a Department Group, please use the following query in UGA Financials: *UGA_GL_DEPT_ATTRIB_LOOKUP*

- For questions regarding your Department Grouping, please contact the [OneSource Service Desk](mailto:onesourcedesk@uga.edu), Attn Reporting.
Remember that it is possible to drilldown in the report to an account code, chartstring, department that has no transactions.
NOTE: When comparing across reports, it's important to remember that column headings are not always exactly the same.
Updated Frequently Asked Questions (FAQs) posted to the [Critical Hire website](#) earlier today from the Chancellor’s office.

**New update**
- All positions hired above $100,000 will require a salary justification.

**Other Updates**
- Added clarity related to reposting closed positions.
- Clarification that temporary interim appointments do not require approval.
- Reclassification language updated for clarity, no change to expectations.
Manager Self-Service
MSS Approver Changes

MSS transactions (termination, position funding, etc.) will no longer be routed to the originator of the transaction.

- Based on a USG System Office decision.
- Relatively small impact ~10% of transactions.
- Will only impact newly submitted transactions.
- May require departments to reevaluate their MSS approvers.
- Use 180_SEC_DEPT_APPROVERS- Departmental Approvers in System Manager Work Center.
- Submit any updates needed through an MSS Security Request.
OneUSG Connect
Faculty Contract Delivery

- Ability to view prior-year contract within *Faculty Contracts* tab.
Commitment Accounting
Replacement of System Manager Reporting Query

• The system manager reporting work center queries, related to position funding, will be replaced by a single query.

• Queries 180_CA_POSITION_FUNDING and 180_CA_POSITION_FUNDING_BY_CF will be replaced with query 180_CA_POSITION_FUNDING_V2.

• The new query will contain all the fields from the old queries along with some additional fields.
Commitment Accounting
Replacement of System Manager Reporting Query

• The new position funding query will have multiple prompts.
  
  Set ID and Fiscal Year are required.
  
  The other prompt values are optional. However, if Project ID is used in the search criteria PC Business Unit must also be used.
• Issue with the UGAJobs Graduate/Research/Student/Temp nightly position feed that may prevent individuals from viewing position updates in OneUSG Connect.

• Vendor is investigating the cause of this interruption.

• Any updates submitted through UGAJobs since Friday, February 28th, will not be reflected in OneUSG Connect. HR is working to get these updates into OneUSG Connect as soon as possible.

• Central HR will reach back out with updated information as it becomes available. Please contact us with any questions you may have via phone at 706-542-2222 or via email at hrweb@uga.edu.
UGAJobs

Unit Ask: Spring Cleaning

- Unit ask emails and workbooks sent to HR Liaisons & Faculty Affairs Liaisons on Monday, March 2nd
- Open office hours was moved to training room 401 (to the right off the elevator).
- You can also contact your designated HR Workforce Planning & Recruitment Team for assistance.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 5th</td>
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<td>Caldwell Hall, room 401</td>
</tr>
<tr>
<td>March 12th</td>
<td>3:00-5:00 p.m.</td>
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<tr>
<td>March 19th</td>
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<tr>
<td>March 26th</td>
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<td>April 2nd</td>
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<td>April 9th</td>
<td>3:00-5:00 p.m.</td>
<td>Caldwell Hall, room 401</td>
</tr>
</tbody>
</table>
Payroll

G-4 State Tax

• Users may receive the below error message when attempting to update the number of withholding allowances on the Employee Self Service G-4 Tax Information screen in OneUSG Connect.

• OneUSG Connect Support is aware of this issue and is working on a resolution.

• Until the problem is resolved, employees can contact fax the G-4 forms to 706-542-6779 send via SendFiles to payroll@uga.edu.
OneUSG Connect Support

New Warm Transfer Option

- Inability to call OneUSG Support and speak to someone who could assist was the **#1 item** in the first round of voting on enhancement priorities.
- New **warm transfer option to UGA** is now available for practitioners.
Workforce Administration
Graduate Assistant Summer Processing

- Updated matrix available on the [Human Resources website](http://www.humanresources.com).

![Graduate Assistant Summer Employment Scenarios](image-url)

- Revised 3/3/20
Office of Faculty Affairs
Summer Hires and Renewals

• Any new hires for summer work/payroll will need to follow standard hiring processes, including all faculty review requirements.
• Schools/colleges/units can begin those processes now.
• OFA recommends submitting hiring proposals at least 6-8 weeks/45 days prior to start date as there are multiple approval levels for hiring proposals prior to it reaching OFA.
• The final deadline for a hiring proposal to reach OFA level is **30 days prior to the start date**

• Ex. For Part Time and Limited Term renewals for the Summer
  • **April 1 is the deadline for Maymester**
OneUSG Connect
Summer Payroll Announcement

• Will only be used for Full Time & Part Time Faculty

• Replaces the use of spreadsheets

• Summer Pay amount can be entered by distributed units

• Currently is not supported by MSS Workflow

• Entry is processed directly to additional pay

• Each Summer month acts like an open enrollment period for summer pay entry. Edits can made at any time for any month up until that month’s lockout date. For example, if the lock date for June is 6/19, you can make edits to the month of June at any time up until 6/19.
OneUSG Connect
Summer Payroll Announcement

New Functionality coming!

<table>
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<th>Employee ID:</th>
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</thead>
<tbody>
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<tr>
<td>Job Code Set ID:</td>
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<td>(Amt Per Summer)</td>
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Summer Pay Details

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<th>Percent</th>
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<th>June</th>
<th>July</th>
<th>August</th>
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Save  Return to Search
OneUSG Connect
Summer Payroll Announcement

1. Summer Pay total is entered
2. Monthly amount is auto-calculated based on the percentages from the configuration; these amounts can be updated
3. Multiple Combo Codes can be used to distribute the earnings
OneUSG Connect
Summer Payroll Next Steps

Important Dates:

• Security Request - Communication will go out in the next week asking for units to submit Summer Pay security request via OneUSGSupport Ticket.

• Webinars will be held on Thursday 4/2/2020 and Wednesday 4/8/2020. Register on the Training Resources page under OneUSG Connect Training.

• Goal is to have the summer pay component up and available to campus April 1.
Questions/Suggestions/Concerns

Contact Us

onesource.uga.edu

onesource@uga.edu

or

oneusgsupport@uga.edu