Weekly Status Call

June 25, 2020
## Training Courses

**Reminder**

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<th>Course</th>
<th>Format</th>
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<td>Understanding Accounts Receivable, Deferred Revenue and Carry Forward Calculation</td>
<td>Recorded</td>
<td>Continuous</td>
<td><a href="#">OneSource Training Library</a></td>
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<tr>
<td>Amazon Punchout</td>
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<tr>
<td>GA Center (Various)</td>
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<td><a href="#">Professional Education Portal</a></td>
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Fiscal Master Calendar
Upcoming Downtimes/Updates

Access the Fiscal Master Calendar for additional dates and information!
Weekly Status Call
Transition to Zoom

• The OneSource Weekly Status Call has been extended!
• The meeting platform will be transitioned to Zoom Webinar beginning NEXT THURSDAY, July 2.
• As a result of this change, we are asking that you:
  • Delete any Outlook meeting invites that reference GoToWebinar after June 25. (We do not have the capability to remove from your calendars.)
  • Request to add/remove employees to the Weekly Status Call invite via this form.
    • For clarification, if you are a current registrant of the GoToWebinar Weekly Status Call, then you will be added automatically, and NO ACTION IS NEEDED unless you want to add individuals to your unit.
  • Accept the new Outlook meeting invitation that will be sent on Monday, June 29 and will include the updated Zoom link for the Weekly Status Call.
The UGA OneCard Office is currently working under campus Phase I protocols.

Will be able to print cards for essential personnel who require IDs for door access to their facilities.

All ID services will be conducted online using email and online payment methods.

Card pickups will be coordinated by appointments and Card Office staff will meet individuals at the exterior doors of the building.

For individuals at the Buckhead, Gwinnett, Griffin, or Tifton campuses, Card Office will coordinate with liaisons at those locations so that ID cards can be picked up from them.

Cards will be activated/updated in the access control systems the morning after the card is issued.

Questions should be directed to ugacard@uga.edu.
INSTRUCTIONS:

• Using your UGA email account, please submit a recent* photo of yourself (a selfie on your cellphone will be fine) to ugacard@uga.edu.

• Also include a photo of your current UGACard or other photo ID.

• The cost of the card is $30 for a first card, $35 for a replacement and can be paid for here.

• Please select the CAMPUS DELIVERY option so that you will not be charged the mailing fee. ID cards are not mailed!

• When the ID is ready, Card Office will contact the individual to make pickup arrangements.

• Photo requirements on next slide.
Photo Requirements:

• Photo must be current (if you are replacing a lost card and your most recent ID has your photo on the gray background, we can simply re-print using the same photo we have on file. We cannot reprint using your red background photo).

• Please stand in front of a solid, light-colored wall or background.

• Use a flash to avoid shadows on your face. If you wear glasses, tilt your head to avoid glare over your eyes (or remove your glasses if that’s easier).

• Do not crop your photo. Make sure your full head and shoulders are in the shot.

• NO PHOTOSHOP OR FILTERS, PLEASE. Photos should be full-color, no black & white, sepia, or other Instagram-style treatments.

• No other people, pets, or props in the photo, please.

• Photo should be focused, not blurry.
June 25, 2020

Financials, Budgets, Reporting
Known Issue
TA Sendback

• Users may receive an error when attempting to re-submit a Travel Authorization (TA) that had been sent back to the initiator from the approver.

• We have determined the cause of this issue, and will be fixed this evening, Thursday June 25.

• If an immediate workaround is needed, please simply submit a new TA.
Budget Management
BPSS Update

• **Current goal is that:**
  • All units are in balance to their allocation sheets
  • All Auxiliary and DSS revenue/expense budgeted
  • All positions budgeted

• Board of Regents (BOR) has not yet provided FY21 budget information to institutions

• Planning for *quick communication and action* once we receive information from BOR.
• UGA Budget Management required two restarts in the last 3 weeks.

• In order to reduce that, the system will be restarted every Friday at 10:00 p.m.
Accounting
Deadline Reminders

• June 25 (TODAY)
  • Accounts Receivable – Copy of Invoices and Summary Detail (word/excel) emailed to acctng@uga.edu
  • Deferred Revenue – Request form
  • Scientific Equipment Reserve – email request to acctng@uga.edu

• P-Cards
  • Cardholders/Approvers have until NOON on July 2 to review/update SPEEDTYPES and ACCOUNT CODES in Works. (Best OPTION)
  • After July 2 changes will have to be made through a GL Journal entry.
    • ONLY 6 business days to accomplish this.
Accounting
Adjusting Period/Year-End Closing

• Journals for FY20 will need to be at the Accounting level by end of day, July 13.
  • July 1 – July 13 Journals will need to be "backdated" to June 30.
  • Year End Journal Entry Preparation

Backdating of journals is ONLY acceptable during the year end adjusting period!
Accounting

Adjusting Period/Year-End Closing

• Journal Reminders
  • Use BudRef "2020" on Adjusting/Closing Journals
  • FY21 will not be open to accept GL Journals until July 14. PLEASE HOLD FY21 Journals until after this date.
  • AP and Travel and Expense Modules will be CLOSED to FY20 activity effective June 27 (Last day to submit is June 26). Any adjustments to activity processed by these modules with a BudRef 2020 will need to be adjusted with a GL Journal between the dates of June 27 and July 13.
  • Grants activity should be reviewed before year end to determine if adjustments are needed to FY20 activity charged to grants.
  • Anomalies – One final "Anomaly" notification will be sent out before July 13. If you have already identified that a specific anomaly is OK, you do not need to do anything else with that item. Look for "new" items that have not yet been researched.
    • Not all Anomalies need adjusting.
      • Revenue deposited FY19 – Refund issued FY20 Will create a debit balance in Revenue – This is OK
      • Expense paid in FY19 – Vendor refund received in FY20 will create a credit balance in Expense – This is OK
      • Anomalies are used to identify "miscoded" items (mismatched or erroneous chartstrings used when transactions were first processed).
Accounts Payable
New Policy for Recognition Awards

• A new policy for Recognition Awards for Employees and Non-Employees has been published to the Finance and Administration Policy Library.

• The policy and related procedures conform to the Board of Regents Recognition Programs policy. The policy clarifies instances when institutional fund sources may be used for achievement/recognition awards.

• Please submit any inquiries regarding updates to onesource@uga.edu and we will get back to you as quickly as possible.
Accounts Payable
Update to Food and Business-Related Entertainment Policy

• The Food and Business-Related Entertainment Policy has been updated to reflect higher purchasing thresholds aligning with current procurement policies.
• Updated policy includes appropriate fund sources for purchases.
• Entertainment form and Food Reference Chart have also been updated to reflect changes.
• The updated policy can be found on the Finance and Administration Policy Page.
• Policy updates are effective immediately.

• Please submit any inquiries regarding updates to onesource@uga.edu.
Accounts Payable
Procedure Modification for Copier Overage Payments

• New procedure effective July 1 will help to reduce labor-intensive work for UGA departments.
• AP will draft the invoice (with the monthly base PO charge and copier overages) into UGAmart.
• Payment for the overages portion will process as a non-PO line item against the chartstring associated with the PO.
• AP will send a comment to the UGA department to create a receipt for the base charge and review the overage amount for the month.
• After the receipt is created, AP will process payment for the invoice. Payment will include the monthly base charge against the PO (reducing encumbrance) and the overage will process as an unencumbered payment against the chartstring associated with the PO.
Accounts Payable
Procedure Modification for Copier Overage Payments

• New process will reduce administrative burden for departments having to create a payment request or p-card payment for the overage amount.

• Maintains sound relationships with copier suppliers, avoiding stoppage of service and UGA credit holds due to outstanding balances.

• This announcement is published on the Accounts Payable website.

• Please submit any inquiries regarding updates to onesource@uga.edu.
Accounts Payable

Procedure Modification for Taxable Travel Reimbursements

• New procedure is effective July 1 and eliminates the need to process a taxable travel reimbursement in AP and Payroll.

• New process allows Expense Manager to complete Payroll's Taxable Travel Expense form once a traveler or delegate identifies a reimbursement is aged beyond the 60-day allowance.

• After the traveler and HR Supervisor sign the form, the Expense Manager submits it directly to Payroll, removing AP from the process.

• This information has been posted to the Accounts Payable website.

• Please submit any inquiries regarding updates to onesource@uga.edu.
Accounts Payable and Expenses

Year-End Reminders

June 26 (TOMORROW) at 5:00 p.m.

- Payment Requests
- AP Journal Vouchers
- Non-Travel Expense Reports
- Travel Expense Reports
- Expense Report Adjustments
Purchasing
Thermometers for Employees

• Departments should order a thermometer for each of their employees through the UGAmart PPE punch out.

• The shipment of thermometers is due to be delivered to Receiving by July 1.
Purchasing
FY21 Purchases – New Departments

• New Departments
  • Departments that will **begin in the new fiscal year** should have UGAmart department approvers set up before any requisitions are submitted for that department ID.

• The department’s Access Request CFO Approver should submit an email to the [OneSource Service Desk](#) to have a department approver added to specific department IDs.
Purchasing
Update to Purchasing Policies

• The following policy updates were made to align with updated State Accounting Office policies; effective immediately:

• **Payment Request Policy Update** (formerly the Check Request Policy)
  • Updated to allow greater usage of payment request for purchases less than $2,500 and to reflect allowable purchases above $2,500.

• **Employee Reimbursement Policy Update**
  • Updated to allow greater use of employee reimbursement for purchases less than $2,500 (previous limit was $500).
  • Was previously incorporated into the Petty Cash policy; now has been given its own section.

• **Petty Cash Policy Update**
  • Updated to allow greater use of petty cash for purchases up to $2,500 (previous limit was $500).
  • This should continue to be used only when other methods are not feasible.

• The updated policies are available for review in the Finance and Administration Policy Library, [Purchasing and Payment Mechanisms](#) page.

• Please submit any inquiries regarding updates to the Service Desk at [onesource@uga.edu](mailto:onesource@uga.edu) and we will get back to you as quickly as possible.
Data Warehouse

Upcoming Budget/Project Cube Changes

• **What:** Data source change will take place on **Friday, July 10**.

• **Reason:** To improve the accuracy of project reporting and add additional data/detail/features to the cubes.

• **Impacted Reports:** Budget and Project Status Cube, Budget Status Report, Project Status Report, Monthly Status Report, and the financials transaction log.

• **User Impact:** This will mean a new download of the cube, not just a filter change. In addition, saved views and subscriptions in the BSR, PSR, and MSR will need to be rebuilt.

• **Questions:** [onesource@uga.edu](mailto:onesource@uga.edu) - ATTN: Reporting
Data Warehouse

Upcoming Budget/Project Cube Changes

- Cube Transition Tips:
  - Start taking screenshots of your current cubes. This information will help you to set up your new cubes.
    - Include your PivotTable fields so you know which fields are included.
    - If you can, include your cube format as well which can help you remember filter settings.
  - Ex. Based on the PivotTable fields you can see UGAACCTTREE is selected as a row. However, you wouldn't see that Level 01 of the account tree was hidden or that Bud Ref and UGADEPTBUDGRPT were filtered to specific values.
Data Warehouse

Upcoming Budget/Project Cube Changes

• Companion Report (Tableau) Transition Tips:
  • Subscriptions versus views:
    • A subscription is a view that has been saved and set up to be emailed to your or someone else on a recurring basis.
    • A view is a saved version of a report – does not necessarily have a corresponding subscription.
  • **Important**: All views that are not associated with a subscription will need to be rebuilt by their owners.
  • Assistance with rebuilding subscriptions
Beginning July 10, the paginated BSR will no longer be available.

Due to the data source change taking place on July 10th, the underlying data for this report will be fundamentally different and it will not be possible to rebuild the report in the same way.

Alternative Reports:

Monthly Status Report
- Similar structure to the BSR v1.0. Two tabs: Summary and Detail
- Can be run for multiple departments at once.
- Provides a carryforward balance, current month transactions, ending balance

Budget Status Report (v2.0/v3.0)
- Summary and detail tabs with transaction and payroll drill-through detail.
- More customizable.
- Can be run for multiple departments at once.
- Can be set up to email out on a recurring basis.
Data Warehouse
Upcoming Project Cube Change

Completed Projects in the Project Status Cube and Report

• Beginning July 10 – projects that have been completed for at least six months will be removed from the project cube and report.

• Data for these completed projects will shift to a new cube that provides actuals and historical data.
  • The tentative release of this cube is scheduled for late August.

• Recommended Queries:
  • For historical balance information: UGA_KK_PROJECT_BUDGET_BALANCE
  • For historical transaction information: UGA_GM_OP_EXPENDITURE_DETAIL
Data Warehouse
Upcoming Budget/Project Cube Changes

Upcoming Training Webinars:

What's New in the Data Warehouse - Budget Reporting
Tuesday, July 14 10:00 a.m. – 12:00 p.m.
Registration Link

What's New in the Data Warehouse - Project Reporting
Thursday, July 16 10:00 a.m. – 12:00 p.m.
Registration Link

In addition, all Training Library materials associated with the current Budget and Project Status cubes and their corresponding companion reports is in the process of being updated.
June 25, 2020

OneUSG Connect,
Human Resources,
Payroll
Commitment Accounting
USG Connect Release 6.11

• OneUSG Connect release 6.11 is set for Friday June 26. No downtime.

• UAT testing finished up this week

• This release is for the new Manager Self Service Change Position Funding functionality that allows for multiple effective dated funding requests in a single transaction.

• This new functionality is in response to multiple change requests submitted by UGA departmental administrators and approved by BSAG. A change request was then submitted by UGA to OneUSG Connect.
UGAJobs tip:

- How to search & save frequently used searches in UGAJobs
  - Positions, postings, applicants and hiring proposals

Resources:

- [UGAJobs Quick Guide: Searching & Saving Searches](#)
- Your [Dedicated HR Team](#) can also assist with creating saved searches!
Payroll

Taxable Travel Expense Reimbursements

• Updated process for Taxable Travel Expense Reimbursements beginning July 1.
  • Taxable Travel Expense Reimbursement process
  • If reimbursement request more than 60 days after end of event, it will no longer be submitted to Accounts Payable.

• Revised Taxable Travel Expense form with link to process on form.
  • Taxable Travel Expense form
Payroll
State Tax Impact of Telecommuting Outside of GA

• Taxation for telecommuting location: [Nexus & COVID-19 telework: Which taxes apply?]

• In general, UGA will continue to withhold GA tax if the employee normally works in GA.

• Submit state tax questions with specific details to oneusgsupport@uga.edu.
OneUSG Connect

Home Address for Face Covering Mailings

- Home addresses were sent SECURELY to designated unit HR Liaisons.
- Home address is **sensitive data** within OneUSG Connect and should be protected.
  - Do not store address files on computers.
  - Delete address files after no longer needed.
- [List of HR Liaisons](#) per unit can be found on the Workforce Planning & Recruitment webpage on the University HR website.

[UGAmart Ordering instructions for Cloth Face Coverings resource page](#)
Home Address Update Instructions

- Home Address stored in OneUSG Connect can be updated by employees at any time. This is done via the Personal Details tile in Employee Self Service (ESS).

- There is an existing Training Tutorial that demonstrates how to complete this process.
Office of Faculty Affairs

Review of Academic Affairs Policy Revisions

• Policy revisions were effective in January 2020 and communicated via Admin Memo at that time.

• In brief, these revisions:
  • Streamlined the appointment process by eliminating the:
    • Requirement that a cover letter be included in every appointment package.
    • Requirement for external letters of recommendation be included in appointment packages.
    • Review of lecturer appointment packages by the VP for Instruction.
  • Modified the offer letter policy to include new document requirements.
  • Modified the Adjunct Faculty policy to align it with the revisions to the appointment procedures in Policy 1.09.
• **Academic Affairs Policy 1.09 (Appointment Procedures)** has been updated to streamline the review steps and required documentation for faculty hiring proposals in UGAJobs. Most notably, the cover letter 1.09-5, and external letters of recommendation are no longer required documents in hiring proposals by the Provost’s Office 1.09-8.

  - Please note, the policy revision for letters of recommendation applies to the hiring proposal only and does not eliminate the need to collect those before extending an offer for a faculty position. The successful candidate’s external letters should be retained by the hiring unit.

  - Additionally, deans or vice presidents may continue to require the inclusion of cover letters and/or letters of recommendation to be uploaded in faculty hiring proposals in order to store those documents as part of the appointment packet or for review in the workflow. Please check with your Faculty Affairs Liaison and/or the appropriate appointment guidelines for each faculty rank for verification on that requirement.
Office of Faculty Affairs
Review of Academic Affairs Policy Revisions

• **Academic Affairs Policy 1.09-1 (Letter of Offer)** has also been modified to include the new document requirements for **faculty offer letter reviews**.
  - All tenure-track and tenure-on-appointment offer letters must be sent, before the final offer is extended, to the Associate Provost for Faculty Affairs for preliminary review, and for approval by the Senior Vice President for Academic Affairs and Provost.
  - Non-tenure track letters offering credit towards promotion must also be sent for preliminary review.

• **Academic Affairs Policy 1.04-7 (Adjunct Faculty)** has been modified to align it with the revisions to the appointment procedures in Policy 1.09. In particular, the reference to a cover letter has been removed.

• An updated **Faculty Hiring Proposal Document Checklist** are posted on the Office of Faculty Affairs (OFA) website.
Manage Faculty Events

Contract Delivery

- As a reminder, Fiscal Year 2021 and Academic Year 2020-2021 contracts for all full-time, regular faculty will be available electronically through the Faculty Data Self Service (FDSS) module of OneUSG Connect.

- Contract administration is dependent on the approval of the FY 21 budget, but we are preparing as much as we can to ensure quick turnaround for communication about the initial department review of faculty contract data.

- Faculty will be notified via ArchNews when contracts are ready for signature.

- Links to faculty and appointment unit support materials are posted on the Office of Faculty Affairs’ Contract website.

- Questions on the contract system may be directed to Angelina Carlson (Angelina.Carlson@uga.edu) or Truitt Broome (truittb@uga.edu) in the Office of Faculty Affairs.
Thursday Tidbit

Microaggressions OR... Micro-kindnesses?

Toward a Theory of Micro-kindness: Developing Positive Actions in Multicultural Education


"The purpose of this conceptual article is to build on the current foundation of empirical research in both psychology and education on microaggressions, a term coined first by Pierce (1970), and to introduce a corollary strand that will interest multicultural educators who can read plenty about negative consequences but who want to read about possible positive actions."
Thursday Tidbit

Microaggressions OR... Micro-kindnesses?

List of 20 potential micro-kindnesses (in the classroom and community)

1. Smile and acknowledge a participant when walking down the street, the hall, or across an open space like a cafeteria or playground.

6. Understand that there is no such thing as Standard English or a neutral accent. This reduces the chance for linguistic racism, which may be one of the most pervasive forms of racism across multiple demographic categories (Delpit & Dowdy, 2002).
Questions/Suggestions/Concerns

Contact Us

onesource.uga.edu

onesource@uga.edu

or

oneusgsupport@uga.edu
OneUSG Connect Query Preview

HR Department Tree

- As a result of an excellent question from last week regarding how to determine a Top HR Department, we bring you a preview of a new query.

- This query can be used to view the HR Department structure in a columns and rows format.

- The query can also be run for a specific HR Department to determine where it fits within the department tree structure.

- Test drive by searching for: **18o_HR_DEPT_TREE** in OneUSG Connect Query Viewer (navigation: Navigator > Reporting Tools > Query > Query Viewer).
OneUSG Connect Query Preview

HR Department Tree

• 180_HR_DEPT_TREE – HR Dept Tree

• Comments/questions: david.maddox@uga.edu