Weekly Status Call

May 2, 2019
Agenda/General Session

- Position Funding Cube Workshop –
  - Tuesday, May 28, 2019
  - Georgia Center, Mahler Hall
  - 10:00 am to noon
- Upcoming System Upgrades
- What’s New in Financials Webinar
- Year End Budget Review Webinar
- Expense Processing Year End
- Fiscal Year End Deadlines
- Funding Work Study Positions
- Effective Dates – Terminations

- Retirement Effective Dates
- Academic Summer Payroll – Open Office Hours
- Summer Pay – Change Form Process
- Summer Pay – Change Form Process Exception
- Graduate Assistant – Summer Employment
- MFE (Manage Faculty Events) Access
- MFE (Manage Faculty Events) Contract Delivery & Timeline
- Leave/Compensatory Time on Timesheet Awareness
- Absence Balance on Timesheet Awareness
May 2, 2019

Session Highlights/Updates
Position Funding Cube Workshop

- **Tuesday, May 28, 2019**
- 10 a.m. to noon
- Georgia Center, Mahler Hall
- No registration necessary
- Available online through [Collaborate](http://datawarehouse.uga.edu/)

The **Position Funding Cube** provides payroll expense details and encumbrance amounts by chartstring by employee.
Don’t Forget!

Upcoming System Upgrades

• Financial Management System will be upgrading
  • Friday, May 17 (3 p.m.) – Monday, May 20, 2019

• Budget Management System will be upgrading
  • Thursday, May 23 (7 p.m.) – Friday, May 24, 2019

• OneUSG Connect
  • Friday, June 7 (5 p.m.) – Tuesday, June 11, 2019 (7 a.m.)
  • Friday, June 21 (5 p.m.) – Monday, June 24, 2019 (7 a.m.)
  • **OneUSG Connect Benefits** (for benefits enrollment) will remain active!
What's New in Financials in May 2019
Webinars May 15th or May 17th

- Please join us for a short webinar –
  - “What’s New in Financials in May 2019”
    - **Wednesday, May 15, 2019** 8:30 - 10:00 am [Register](#) OR
    - **Friday, May 17, 2019** 8:30 - 10:00 am [Register](#)
- Links are also available on the [Training resource page](#)
- Financial Training (scroll to the bottom of the page)
Year End Budget Review Webinar

- Please join us for a short webinar –
  - “Useful Reports for Year End Budget Review”
  - **Wednesday, May 22, 2019** 1:30 – 3:30 pm [Register]
- Links are also available on the [Training resource page]
  - Financial Training (scroll to the bottom of the page)
May 2, 2019

UGA Financial Management System Module Awareness
Travel & Expenses
Expense Processing Year End

• **We need your help!** 2000+ Expense Statements still “pending”
  • Inactive transactions should be cleaned up and/or deleted by year end.
    • Delete Expense Reimbursements that are “Pending” and not submitted into workflow
    • If an expense report is returned for correction, it should be corrected and re-submitted within 5 days.
    • If an expense report will not be reimbursed, it should be deleted within 3 days of being returned.
  • These unsubmitted expense reports can be monitored using the Business Management Workcenter queries: *Entry-Pending User Submission*
  • Instructions can be found in the [Training Library (Deleting an Expense Report)](https://onesource.uga.edu).

• **This may release funds for you.** If these transactions have budgeted checked and encumbered, as they get deleted, they will release those funds.
Travel & Expenses
Expense Processing Year End

• Reminder
  • **June 26** - Last day to send in expense reports with 2019 budget reference. Must be submitted & workflow completed to Accounts Payable.
    • *Any expense statements started in FY19 and not submitted by this date will need to be deleted.*

• **June 27** - New expense reports created will be dated July 1, 2019. Will process to General Ledger after year-end. Must use Budget Reference 2020.
Travel & Expenses
Expense Processing Year-End

- **Expense Report Clean-Up**
  - Pending travel and general expense reports that are not in workflow by May 15, 2019 and are over 60 days old will be deleted by Accounts Payable.
  - We can delete a travel or general expense report on your behalf. Please contact the Service Desk ([onesource@uga.edu](mailto:onesource@uga.edu) or 542-0202 Option 2) if you need assistance with a travel or expense report or need assistance deleting a report. [Training link here.](#)
  - Ongoing, Accounts Payable will delete pending travel or general expense reports with zero dollars and have not entered workflow within 60 days of creation.
May 2, 2019

OneUSG Connect
Module Awareness
Commitment Accounting
Fiscal Year End Deadlines

- **June 19th**: Position funding changes for the monthly pay period ending 6/30/2019 (96M1) must be approved at all levels by 6/19/2019.
- **June 27th**: Position funding changes for the bi-weekly pay period ending 6/29/2019 (97B1) must be approved at all levels by 06/27/2019.
- **June 28th**: The process which will zero-out FY19 personal service encumbrances will run 6/28/2019.
- **July 5th**: The last day to submit a direct retro request for an FY19 OneUSG Connect pay period is Friday, July 5th.
- **July 5th**: The last day to submit a position funding change for an FY19 OneUSG Connect pay period, to trigger a budget retro, is Friday, July 5th.

**NOTE:** Payroll adjustments for a legacy mainframe pay period should be processed with a general ledger journal entry in the UGA Financial Management System. General ledger journal entries should be routed through approval workflow to the Accounting Department by noon, June 28, 2019.
Commitment Accounting
Funding Work Study Positions

• All positions in the College Work Study (Federal Work Study) pay group 18W should be funded:
  • 75% by an Office of Student Financial Aid combo code
  • 25% by the departmental combo code(s)
• If you have questions about the appropriate work study combo code, contact the Office of Student Financial Aid at (706) 542-6147.
Workforce Administration
Effective Dates – Terminations

• To terminate an employee, please submit a form through MSS. A recent USG update was made to the form, changing it to indicate “Effective Date” rather than “Transaction Date”.

• Please continue to use the comments section to communicate termination information including departmental information, last day worked, if they are on annual leave/dates, and if you are aware of a transfer.

• **Unless otherwise directed**, termination effective dates are the first day following the last day worked. This last day worked is the last day the person is paid / the last day that they are an official employee of UGA.
  • The effective date can be a weekend, holiday, or during a pay period.
  • Please do not attach any sensitive information such as social security information or any adverse actions through OneUSG Connect and MSS transactions.

• Be on the lookout for additional support on how to process terminations.
# OneUSG Connect

## Termination Reminders

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>Payroll Type</th>
<th>Last Work Day</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Academic Payroll:</td>
<td>Dates may vary</td>
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</tr>
<tr>
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<td>Monthly</td>
<td>May 10&lt;sup&gt;th&lt;/sup&gt;</td>
<td>May 11&lt;sup&gt;th&lt;/sup&gt;</td>
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<tr>
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<td>Bi-weekly</td>
<td>May 10&lt;sup&gt;th&lt;/sup&gt;</td>
<td>May 11&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
<tr>
<td>12 month Faculty</td>
<td>Monthly</td>
<td>May 10&lt;sup&gt;th&lt;/sup&gt;</td>
<td>May 11&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
<tr>
<td>Fiscal Grad Asst.</td>
<td>Monthly (Fiscal Salary)</td>
<td>May 10&lt;sup&gt;th&lt;/sup&gt;</td>
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</tr>
<tr>
<td><strong>Academic Payroll:</strong></td>
<td>Dates may vary</td>
<td>Dates may vary</td>
<td><strong>Date MUST be:</strong></td>
</tr>
<tr>
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<td>June 1&lt;sup&gt;st&lt;/sup&gt;</td>
</tr>
<tr>
<td>Academic Faculty</td>
<td>Monthly (10 month)</td>
<td>May 10&lt;sup&gt;th&lt;/sup&gt;</td>
<td>June 1&lt;sup&gt;st&lt;/sup&gt;</td>
</tr>
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These are typical scenarios and do not cover employees on Leave without Pay, or other extenuating circumstances. Please continue to provide details in the comments section of the Termination request.
# OneUSG Connect

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Benefits
Retirement Effective Dates - Questions

• How do we determine a resignation vs. a retirement?
  • The employee has the responsibility to make the department aware they are retiring. This should be noted on their resignation letter.

• What if you have a retirement date of 7/1/19 but last day worked is 6/12/19?
  • The employee will need to either use annual leave or be put in a leave without pay status.

• Should "retirement" be used if the employee is only eligible based on USG service not TRS/ORP eligibility?
  • Yes, if they have the service time with UGA/USG to take benefits into retirement please use “Retirement" as the reason.
Benefits

Retirement Effective Dates - Questions

• Is there still a retirement form that must be submitted, or is it now processed in OneUSG Connect?

• Employees will still need to work with Central HR to finalize the retirement process. Central HR will help employees process their TRS retirement application as well as ensure that benefits are set up correctly to continue into retirement.

• Employees that are ORP participants will also need to coordinate with their ORP vendor to complete paperwork to initiate retirement distributions from their ORP accounts.
As you are submitting summer academic payroll, you may have an “emergency hire” issue where you need to (unexpectedly) hire someone at the last minute to be able to pay them for Summer School.

- **Caldwell Hall Rm. 401**
  - Thursday, May 2 from 3:00 to 5:00
  - Friday, May 3, 8:00 to noon and 1:00 to 5:00
- **No registration required**

Please plan to attend if you have any Graduate Assistants or Part Time or Limited Term Faculty hires that are needed for Summer School, especially Maymester.

Please bring all available supporting documents with you. For faculty hires, this includes draft or signed offer letters/letters of agreement.

- We will have HR, Faculty Affairs, and Payroll staff available during these sessions. We can assist with all parts of the process, including:
  - Position Creation
  - Position Posting
  - Direct Hiring
  - Background Checks
  - Onboarding
  - Faculty Hiring Letter review
  - EEO requirements
  - Position Funding
  - Compensation questions
  - Academic Summer Payroll Change Forms

- If you have questions about these open house hours, please contact us at onesource@uga.edu or at 706-542-0202.
Summer Pay
Change Form Process

• The Change Form will be filled out by the department and submitted via the Manager Self Service Ad Hoc Salary Change by System Managers. This should be completed by the same unit that submitted the template.

• Transactions will route through the normal workflow for the unit and then to Office of Faculty Affairs, HR and Payroll.

• The transaction will be entered with an “increase” using in-range salary adjustment for $.01.

• Payroll will approve the transaction and process the changes in Additional Pay. The transaction comments should reflect that the transaction was approved.
Academic Summer Pay Change Form Process

Dept System Manager
- Attach form in Ad Hoc Salary Request

Dept. Approver
- Approve in MSS

Office of Faculty Affairs
- Check for issues
- Approve for Faculty

Graduate School
- Check for enrolled hours
- Approve for Grad Assts.

Payroll
- Check for issues
- Enter Additional Pay lines

Onesource
University of Georgia
onesource.uga.edu
Summer Pay
Change Form Process Exception

• If the employee is not available as a choice in Manager Self Service because the Initiating Department does not have access to the employee in OneUSG Connect –
  • Email the form to HRWeb@uga.edu and include the name and email of an approver in the Initiating Department. This person needs to already be an approver of Manager Self-Service transactions.
    • HRWeb reviews the form and initiates the MSS transaction on behalf of the department.
    • HRWeb inserts the approver into the transaction using ad hoc approver functionality.
    • This allows the transaction to be approved by both the Initiating Department and the home department.
Academic Summer Pay Change Form Process Exception (Initiating Department and Home Department)

**Initiating Dept. System Manager**
- Email for with Dept Approver name to hrweb@uga.edu

**HR**
- Attach form in Ad Hoc Salary Request

**Initiating Dept. Approver**
- Review
- Approve in MSS

**Home Dept. Approver**
- Review
- Approve in MSS

**Office of Faculty Affairs, Graduate School, Payroll**
- Review
- Approve
- Process
Summer Pay

Change Form Process Exception

• Change forms should be submitted as soon as any issues arise. The earlier these are submitted the better chance employees will be paid on time.

• If changes are processed after pay sheet generation, please note the following considerations.
  • If an addition/removal is processed, payroll will add in the change and the payment (back pay or overpayment), will be made according to normal procedures (typically on the next payroll cycle).
  • If you are only requesting a change to funding, a direct retro will be required instead. Departments will need to follow the standard procedure for direct retros instead of using the change form.
# Summer Pay Change Form Example

## UGA Summer Academic Payroll Change Form

<table>
<thead>
<tr>
<th>Requester</th>
<th>Bob Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester's Department</td>
<td>Department Name</td>
</tr>
<tr>
<td>Contact Phone Number</td>
<td>706-542-2222</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:Bob.Smith@uga.edu">Bob.Smith@uga.edu</a></td>
</tr>
<tr>
<td>Dept Approver if employee is not in Home Department</td>
<td>John Doe</td>
</tr>
</tbody>
</table>

**Comments:** I need to change the combo code for person B.

<table>
<thead>
<tr>
<th>Name</th>
<th>Grad Student Only - Hours Registered</th>
<th>EmplID</th>
<th>Empl Rec</th>
<th>Combo Code (14)</th>
<th>Other Pay Amount</th>
<th>Pay Period</th>
<th>Add or Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person B</td>
<td>12</td>
<td>1809876</td>
<td>1</td>
<td>432310211001110</td>
<td>500.00</td>
<td>June</td>
<td>Remove</td>
</tr>
</tbody>
</table>
Graduate Assistant
Summer Employment Scenarios

- After collaboration with several campus partners, a matrix has been developed to help units process Graduate Assistant (GA) summer employment scenarios.
- Scenarios include GA working in a different position over summer, working in current spring position over summer but not returning in the fall to same position, etc.

Fundamentals

- Changes in compensation for GAs should be processed through OneUSG HCM MSS Adhoc Salary Request
- Changes in funding should be processed through OneUSG Connect HCM - MSS
- Changes in Standard Hours/FTE for the GAs should be processed through UGAJobs by Evaluating the position.
- If not returned to the same position, the GA should be terminated at the appropriate time.
# Graduate Assistant

## Spring/Summer/Fall Work Scenarios

Example rows from matrix – The complete matrix with all scenarios can be found at: https://hr.uga.edu/_resources/pdf/Graduate-Assistant-summer-employment-matrix.pdf

Please contact us at hrweb@uga.edu or 706-542-2222 if any questions.

<table>
<thead>
<tr>
<th>Graduate Assistant</th>
<th>Working as GA in Summer</th>
<th>Working as Biweekly in Summer</th>
<th>Spring 19 position will resume in Fall 19 **</th>
<th>Paid via Summer Pay</th>
<th>Action Necessary</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>If the Graduate Assistant does not already have a Short Work Break (SWB) and they will not be actively working in their GA position during the summer break, a 6/1 SWB needs to be requested* via <a href="mailto:OneUSGSupport@uga.edu">OneUSGSupport@uga.edu</a></td>
<td>If the Graduate Assistant will continue to work as normal in their GA position during the summer, no action is necessary as they will continue to be processed and paid on the monthly payroll.</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Submit a termination request via MSS to remove the Graduate student from their GA position.</td>
<td>If transferring to a different position, the new unit needs to create a position (if a vacant one is not available) and hire the individual into this position.</td>
</tr>
</tbody>
</table>
On April 15th, Georgia Bureau of Investigations (GBI) Georgia Criminal Information Center (GCIC) changed their consent form requirements where the (GBI/GCIC) now requires an additional consent form in order for Sterling (Background investigation vendor) to process a State of Georgia Statewide criminal background check through the Georgia State Criminal Repository.

If an applicant is required to complete the GCIC consent form, Human Resources will reach out to them directly. They will receive a separate email notification from employ@uga.edu with the consent form and instructions attached.

Applicants requiring a GCIC background check will receive two emails as follows:
- one from Sterling Talent Solutions (DoNotReply@talentwise.com) which includes a link for the applicant to access and complete the remaining information through Sterling’s secure portal, and
- one from UGA Human Resource (employ@uga.edu) pertaining to their Georgia Statewide paper consent form

Human Resources is aware of Sterling background processing delays due to these new requirements and is actively seeking solutions to help alleviate delays.
- Exploring options with new background vendor, Accurate.
OneUSG Manage Faculty Events (MFE) Access

- Units should now request MFE access through Manager Self-Service.
  - The request can be routed through the MSS Security Request Form.
  - This would allow for the capture of departmental approvers.
  - Do include the specific department for which the request is being made.

- MFE access allows units to see their department's faculty rank and tenure data as well as manage their department's Additional Post (Courtesy Faculty, Center and Institute Membership, Graduate Program Faculty and Graduate Program Coordinator).
Manage Faculty Events
Contract Delivery

• Faculty Contract Delivery system is LIVE!
• Departments will access contract information via a query in late May 2019.
  • Review and then contact Office of Faculty Affairs about errors that week
  • Additional rounds of review/delivery will be available for those with errors
  • OFA and OneSource will continue communications with OFA Liaisons and Faculty.
• Information has been published on a New OFA Page
  https://provost.uga.edu/faculty-affairs/contracts/
• Join us for a Webinar May 16th at 8:30am
  https://attendee.gotowebinar.com/register/250298722522460685
Manage Faculty Events

Contract Delivery

Faculty will access their own contract via OneUSG Connect in early June 2019

- Faculty members need to be notified by their departments that their contracts are ready for review, signature and printing. We plan to send an ArchNews.
- **Faculty will sign contracts electronically**
  - Allow at least 20 calendar days for review of contract (June blackouts, so 25 "days")
  - Ensure faculty can login prior to leaving campus for the summer
Manage Faculty Events
Contract Delivery Timeline

- **Job Aid** handout and tutorials are available in the Training Library for printing and distribution in departments.
- **April 24** ArchNews Faculty “Contract Delivery will be online.” Link to OFA web
- **May 8** Webinar for Faculty, including how to access, view, and sign contract
- **May 16** Webinar for Departmental Users, including process and Faculty view
- **May 20** Query available, training recording available
- **May 24** Deadline for initial Contract errors notification to OFA
- **Early June** ArchNews to Faculty - Contracts are available

Questions on this new contract process may be directed to Beverly Minor in the Office of Faculty Affairs at baford@uga.edu or 706-542-0547.
The **Leave/Compensatory Time tab** on the timesheet reflects Comp Time and Deferred Holidays that have been earned.

- This does not account for absence events that have been taken.
Absence Balance on Timesheet Awareness

- The *Absence tab* on the timesheet reflects the true absence balances, including what has been earned and taken.

<table>
<thead>
<tr>
<th>Absence Entitlement Balances</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Entitlement Name</strong></td>
</tr>
<tr>
<td>-------------------------</td>
</tr>
<tr>
<td>Educational Leave Balance</td>
</tr>
<tr>
<td>Deferred Holiday Balance</td>
</tr>
<tr>
<td>Comp Time Balance</td>
</tr>
<tr>
<td>Vacation Balance</td>
</tr>
<tr>
<td>Sick Balance</td>
</tr>
</tbody>
</table>

**Disclaimer** The current balance does not reflect absences that have not been processed.
Questions/Suggestions/Concerns

Project Feedback
onesource.uga.edu
onesource@uga.edu
oneusgsupport@uga.edu