

## **Business Manager Meeting Notes**

April 28, 2004

The April 28, 2004 Business Managers Meeting included presentations on Key Control clearance, Performance Management Process (PMP), Family Medical Leave Act (FMLA), Form I-9 (Employment Eligibility Verification), an update on the Purchasing Card training, and comments on a few miscellaneous items.

Tom Page, Controller, opened the meeting. Tom stated that meeting highlights and any handouts distributed at the Business Managers Meeting are posted on the Controller's web site, <http://controller.utoledo.edu/BusMgrMeeting.asp>.

Harry Wyatt, Associate Vice President, Facilities Management, discussed key control. Since our key control is quite decentralized, it is often not taken seriously. If it's looked up as to who has keys for a certain location, it's not unusual to see past employees listed. He stated that no one can authorize himself/herself for a key. Requests for the more global keys (master, sub-master) are subject to more scrutiny than room keys. Harry said that key clearance is one component of the employee separation process. Connie Michalak, Compensation Specialist in HR, is working on tightening up the separation process clearance procedure. You can request a list of all the keys signed out to a person; those keys must be turned in when that person leaves the University. Harry stated that key transfer is to be done face-to-face, not by paperwork submitted after the fact. If you have questions, contact Cheryl Karnikowski, Administrative Coordinator, Facilities Management, at x1000 or x1422. The prices charged for lost keys are \$25 for a room or \$50 for a master.

Matt Dills, Director, Compensation Administration, discussed the PMP process. On the HR web site, there is a timeline for the PMP process as well as the related forms: [http://humanresources.utoledo.edu/EmploymentServices/PMP\\_Page.htm](http://humanresources.utoledo.edu/EmploymentServices/PMP_Page.htm). If you have any specific questions, contact Matt via e-mail or at x1484. Matt announced that training sessions would be held during the week of May 4. The training is intended primarily for new managers. An employee self-evaluation form is included in this year's PMP forms.

Matt also covered Family Medical Leave Act (FMLA). The presentation will be put on the HR website, <http://humanresources.utoledo.edu/EmploymentServices/fmla.htm>, which is currently under construction. Note that UT's policy is in some ways more generous than the FMLA minimum code. FMLA cases are considered largely on a case-by-case basis.

Regarding absence reports for FMLA, Patricia Palominos, HRS Coordinator in HR, asked that FMLA be clearly noted as such on absence reports. This will help prevent overpaying employees. Contact Patricia via e-mail or at x1471 if you have any questions.

Patricia also covered Form I-9, Employment Eligibility Verification. Please refer to the HR website, [http://humanresources.utoledo.edu/EmploymentServices/EmploymentPageDoc/i9\\_form.pdf](http://humanresources.utoledo.edu/EmploymentServices/EmploymentPageDoc/i9_form.pdf). UT is responsible for I-9 documentation for all employees, including students. Patricia suggested keeping I-9's in a single file location, and maintaining either alphabetically or by year.

Matt said that HR will do presentations to groups upon request. Contact him via e-mail.

Regarding the Auditor of State (AOS), at the last meeting we thought UT might be required to check the AOS web site to see if a potential employee owes any money to the state before he/she is hired. We have since found out that this will apply only to businesses, not individuals, and there will be a certain dollar threshold.

Matt is working on a summary sheet of eligibility for benefits, retirement, etc. for the various groups on campus (faculty, Professional Staff, Classified Staff, etc.). If you have any of that information documented, Matt would appreciate having this passed on to him.

Linda Chany, Fiscal Officer in Accounts Payable, has started Purchasing Card training for cardholders in the Athletics and Enrollment departments. She stated that all cardholders and approvers must go through the training. She will work from her list of cardholders to schedule training. At the training, the attendees are to turn in their old Fifth Third card and they will receive the new P-card at the training. Linda mentioned that usage of the new P-card will generate revenue for the University, so it's to UT's benefit to put as many charges as possible on the P-card.

If someone needs to be set up as a non-cardholder, please e-mail Linda with that information.

With the rollout of the new P-card, Accounts Payable will begin not reimbursing employees for travel until after the travel has taken place.

Linda said she can increase or decrease a cardholder's dollar limits on a P-card. For example, if an Athletics coach is recruiting, his/her P-card limit can be increased for a certain time frame. Contact Linda by e-mail to request a P-card limit change.

P-card transactions on Payment.Net can be checked on a daily basis. The transactions will be posted to FRS twice per month.

Someone asked about reimbursements to individuals via direct deposit. With the new ERP, we are looking at having this capability.

The Accounts Payable staff has began using a "power card" to pay certain requisitions and purchase orders. The A/P staff e-mails the originating department verification of payment on the power card.

Tom Page brought up a few miscellaneous items. The year-end deadlines memo and FY05 payroll schedule have been sent to the University community by interoffice mail, e-mail, and the UT News. The payroll schedule is posted on their web site, <http://payroll.utoledo.edu/PayrollNoticesSchedules.asp>.

Regarding cell phone policy, a committee has been meeting regularly. This committee is looking at UT's policy as well as compliance with the State's directives on cell phone usage. More information will follow once this committee makes their recommendations.

The Enterprise Resource Planning (ERP) group has since seen vendor demonstrations May.