

Business Manager Meeting Notes

May 4, 2005


The May 4, 2005 Business Managers Meeting presented information on the PMP process, Visiting Faculty and COBRA, clarification of the part-time employee fee waiver, reduced hours for the Summer, Purchasing Card issues, an ERP update, memos that have been circulated in the past month or so, and a few miscellaneous comments.

Tom Page, Controller, opened the meeting. He mentioned the various memos that have come out in the past few weeks – FY05 year-end deadlines, FY06 payroll schedule, and deficit carry-forwards. Hard copies were available at the meeting. Contact Tom if you have questions about deficit carry-forwards. Tom also brought up a NSF (National Science Foundation) policy limiting summer salary for faculty member grantees on academic-year appointments to two-ninths of their regular academic-year salary. Contact the Grants Accounting Office with questions about this NSF policy.

Andrea Cutcher, Senior HR Specialist, and Cherie Drinkwater, HR Specialist, discussed the PMP (Performance Management Plan) process. It is on the HRS web site, <http://humanresources.utoledo.edu/EmploymentServices/PMP2005.asp>. Andrea mentioned that a notification memo went out last week. The PMP form has changed slightly – there is an employee comment section and a section for professional development goals. The forms are due to HR by June 24, 2005. This year there are significant changes to training. New managers are asked to attend one of six training sessions. Departments may choose to make self-appraisal a requirement. Also, as part of the Professional Staff compensation project, please send an electronic job description with the PMP.

Cherie also discussed Reduced Summer Hours. In departments with reduced summer operations, UT staff members may take an unpaid personal leave of absence or work reduced hours from May 9, 2005 through August 12, 2005. It is up to the department management's discretion whether or not to allow a reduced summer work schedule. This information is available on the HR web site, <http://humanresources.utoledo.edu/Main/ReducedSumHrs2005.pdf>.

Deithra Glaze, Director of Benefits, HR, discussed Visiting Faculty and COBRA (Consolidated Omnibus Budget Reconciliation Act). In short, COBRA gives UT's Visiting Faculty the option to buy group health insurance coverage for themselves and their families for a limited duration. This is the first year where their appointment term is different – it's August 1, 2005 through July 31, 2006. Please submit terminating Personnel Action (PA) forms in a timely manner so that HR can provide COBRA notices to the affected people. Direct questions to Deithra; John Satkowski, Associate Vice President, Academic Finance and Planning; or Geof Tracy, Assistant Director of Academic and Financial Planning.


Deithra also talked about fee waivers for part-time employees. The memo has been sent to part-time employees who have submitted fee waivers, Memo-Fee Waiver PT . An employee who works at least .5 FTE is eligible for the fee waiver benefit in proportion to the percentage of his/her full-time equivalency (FTE). For example, an employee who works 30 hours/week (.75 FTE) and is taking three undergraduate credit hours in the amount of \$828.51 will have \$621 (75% of \$828.51) of his/her fees covered. If you have any questions, contact Deithra or Terrie Kovacs, Benefits Specialist, at x1442.

Linda Chany, Fiscal Officer, Accounts Payable, discussed Purchasing Card issues. Huntington is no longer partnered with JP Morgan Chase, so there will be new cards for existing cardholders. New cardholders will receive the new cards. Existing cardholders will need to exchange their current P-card for the new one. Linda hasn't received the replacement cards yet.

Linda also talked about departments putting Office Depot purchases on the P-card. Doing this will be a considerable financial benefit to the University. There are some details that need to be worked out yet. The Office Depot packing list provides an itemized list and dollar amounts, so it is acceptable documentation to submit with the P-card statement.

On PaymentNet, Linda asked that people make sure there is an object code provided for each transaction. She is noticing that the object code is missing for some transactions. Also, when using the "Approve Pending" option on PaymentNet, you must put a comment in the Notes section. If the "Approve Pending" is checked or the "Approved" box is not checked, the approver as well as the cardholder needs to sign the P-card statement.


Linda said the monthly payments on the Accounts Payable Power Card are on their web site, <http://accountspayable.utoledo.edu/PCard/Default.asp>.

Brian Bushong, Director, ERP, Doris Celian, Director of Accounting Operations and ERP Team Member, and Rick Kessler, Manager, Employment Services and ERP Team Member, discussed the Luminus web portal. The ERP Team has been directing considerable effort to this. Doris did a PowerPoint presentation on the new portal, which will be called "My UT." There will be a single sign-on for network and most all UT-based applications. The "go live" date for faculty and student access to the web portal is October 1, 2005. Doris showed examples from other universities illustrating how the user can create and configure his system the way he/she wants it. Rick Kessler distributed a handout and discussed the Banner HR module pyramid and its application to UT, Banner Pyramid . He said UT is in the configuration stage of setting up rules.

Tom Page wrapped up the meeting with a few concluding remarks. He said the longer the agenda is, the quicker we get through it! There will be more information coming out about Office Depot and the P-card. We expect a new P-card contract with greater

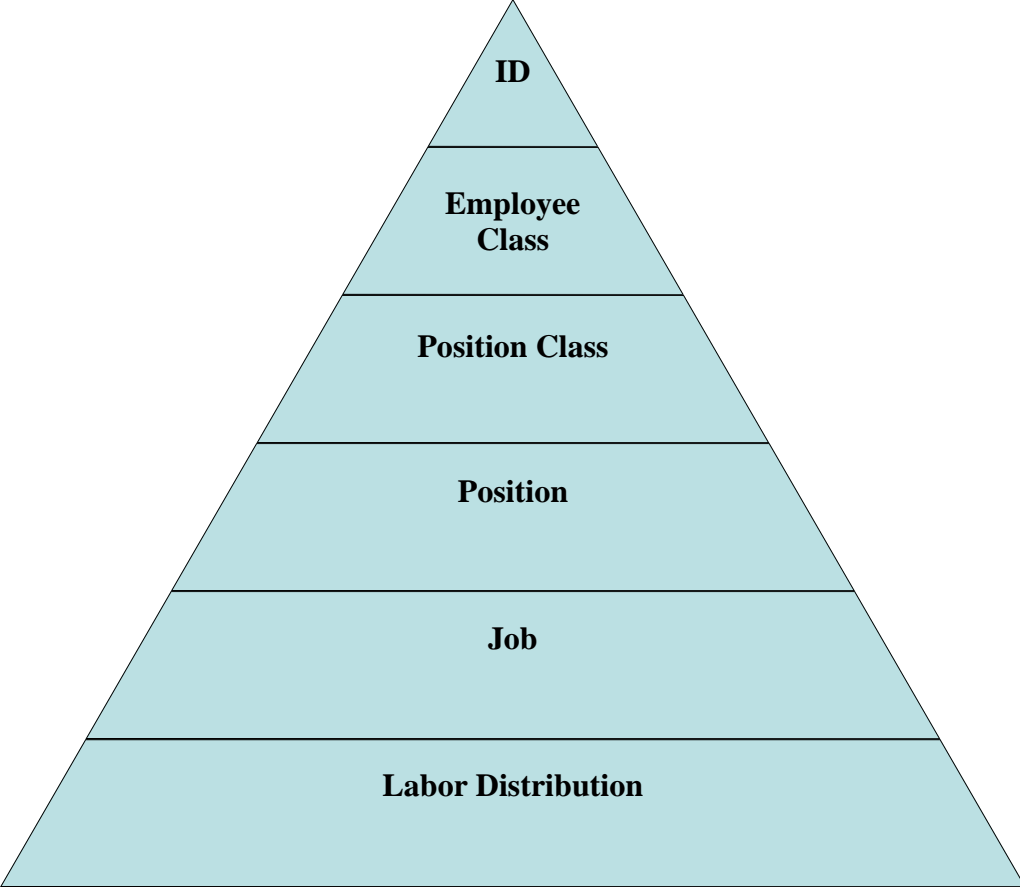
discounts to be in place by July 1, 2005. The Business Manager meetings are planned to continue over the summer. Tom also mentioned that departments that receive cash need to be make procedures are in place. If a department needs help with cash procedures, he has some guidelines that can be adapted to individual areas.

Attachments:

Memo - Fee Waiver PT 

Banner Pyramid 

**University of Toledo
Project EntERPrise
Human Resource Module**

<u>Banner Pyramid</u>	<u>Definition</u>	<u>Application to UT</u>
 <p align="center">ID</p>	Payroll calendar	Salaried Bi-Weekly
<p align="center">Employee Class</p>	Group of employees with similar characteristics	Unclassified Professional Staff / similar to job group codes
<p align="center">Position Class</p>	Tool for tracking and reporting positions. Used in compensation analysis.	Manager
<p align="center">Position</p>	Budgeted entity assigned to a department.	Manager of Payroll
<p align="center">Job</p>	Assign the employee to the position.	Assignment
<p align="center">Labor Distribution</p>	Distribute costs to one or more departments.	Labor Distribution

DATE: **May 2, 2005**

MEMO TO: **Part-time Fee Waiver Participants**

FROM: **Deithra Glaze, Director, Benefits**

RE: **Part-time Fee Waiver Administration**

Several calls have been received by the Bursar Department inquiring about part-time fee waiver processing. We felt it was important to clarify the administration process as soon as possible.

Employees who work 50% of full-time or more are eligible for fee payment benefit in proportion to the percentage of full-time which the employee works. Please note, that the percentage/proportion of payment is based on the applicable fees for the registered hours. For example, if an employee works 30hrs/.75FTE and is taking three undergraduate credit hours in the amount of \$828.51, the benefit amount is figured by multiplying .75 times the registered hours of \$828.51, which will equate to a fee waiver benefit applied to his/her account in the amount of \$621.00.

All fee waivers received to date have been processed, so please pay all outstanding fees by May 6, 2005 to keep your scheduled classes. Any unpaid accounts over \$200.00 will be de-registered at the end of the day of May 6, 2005 and you may continue to have late fees applied to your account.

If you have any questions relating to the part-time fee waiver administration, please feel free to contact me at 419-530-1475 or Terrie Kovacs at 419-530-1442.

Thank you.