Council of the University of Idaho Business Officers
Summary Notes
September 13, 2012

Accounts Payable Update – Linda Keeney

Fed Ex is no longer supporting the download program & everyone is asked to use a purchasing card or claim voucher for their Fed Ex charges. The discounted rates will stay the same. Please contact Accounts Payable if your rates do not look correct.

New Travel Electronic Process – They are testing the new electronic travel process now. The new process will allow you to use electronic signatures. The travel process will be similar to the electronic claim voucher process. All documentation will be scanned & submitted through Vandal Web. The Budget Office asks that each Department ensures that they have sufficient money in their budget before they process claims in order to avoid hitting the NSF queues. The Budget Office may have to disapprove documents that hit the NSF queues in the future if the volume becomes a problem. Everyone is asked to be proactive and do budget transfers before completing claim vouchers or travel claims.

There have been problems with Claim Vouchers being disapproved in the Banner queues & people not being notified that they have been returned. So far the major reason claim vouchers have been disapproved is because of incorrect e-codes. As a result it is important to make sure your claim vouchers are correct before they leave the claim voucher system & hit Banner. Everyone was asked to think of ways to improve the budget process so we can get things right on the front end without having to do clean up on the back end of the process. It was mentioned that the default e-codes set up in the claim voucher system may need to be revised. If anyone has further suggestions please bring them with you to the next meeting.

Budget Office Update – Janice Todish & Jill Robertson

FWRPBSR report has a new parameter 10 – which allows you to exclude benefits when you run the report. This change is in production now.

FWRDOAR report has a new parameter 18 – allows you to exclude salaries and benefits when you run the report. Also, the fund range field will remain in the DOAR report but a fund type field will be added.

Employees on Permanent PCNs with 01 Suffixes – Jill Robertson

The Budget Office asks that you try to clean up any remaining positions that have a permanent employee with a 01 suffix as the state does not fund employees on temporary appointments. In the past employees were put on this way in order to keep a PCN active however, we can process PCN reactivation internally now so this practice is no longer necessary. If there is a legitimate need for exception please work with the Budget Office before you put that employee on the system.

Chair/Department Head Appointments - Jill Robertson, Mary Stout & Brenda Helbling

All faculty have been entered into Banner PEAFACT and all new faculty should be in the system soon. If you need access to create reports please send Mary an email. The Provost's office will be meeting with the dean's assistants across campus for training on the faculty screens/reports now available in Banner.

The Provost Office, Budget Office & HR would like to standardize the appointment process & titles for faculty with administrative roles that report to the dean such as Department Heads/Chairs.   These faculty members will be put in a designated administrative PCN for the length of their administrative appointment. There was discussion about whether or not faculty should be budgeted at their faculty base salary or the salary with the administrative stipend included. There was some resistance to budgeting these faculty at their base salary rather than the salary with the stipend included. Discussion will continue in the future on this topic. Further information is included on the handout attached.

A new EPAF category has been added FCHPAY (faculty change of pay).   The Provost's Office will now be in the approval queue for this EPAF category.   Everyone is asked to use this code only for all Faculty Pay Changes.

Permanent PCN's with .01 Suffix-CUIBO 9/13/2012

- This combination is an exemption and should only be used when:
    - A <u>temporary</u> employee is filling a <u>permanent</u> position. (Rare.)
    - A <u>permanent</u> employee is serving in an <u>interim</u> role. (Ex: Interim Dept. Head, Interim Dean.)

- Using a permanent PCN with .01 suffix is no longer needed to keep a PCN active. ☺ We process reactivations internally using PAF's approved by Keith Ickes.

- Only <u>one</u> employee may be on the permanent PCN regardless of suffix. There can be a short overlap when someone is retiring or leaving UI and they are training the new employee.

- The <u>temporary</u> employee filling this position must have an .01 suffix and must <u>be aware they are hired as a temporary employee.</u> Their name will not print in the budget book, they will not be automatically reappointed at fiscal year time and they will not receive a salary letter/ agreement from the Budget Office/Provost Office. They are the same as employees on 9,000.01 PCN's.

- The position is set up as permanent in the system with permanent funding and FTE. NBAPBUD will not be changed to the salary of the .01 employee unless the fiscal officer works with the Budget Office and requests this change.

- For Faculty, using an .01 suffix with a permanent PCN must be approved by Mary Stout/Provost Office prior to putting on the EPAF.

- For Exempt and Classified please work with the Budget Office prior to processing EPAFs so we are aware and don't return your EPAF for using the incorrect suffix. Comments within your EPAF are always appreciated. ☺

- Using the .01 suffix with a permanent PCN combination should be an exemption. If you plan to use this combination the PAF should reflect this. It should be marked, 'fill vacant position' (with the permanent PCN number) and then the 'temporarily funded box' should be checked. In the rationale box please add justification for using this combination and explain you plan to hire a temporary .01 employee into this permanent position and why you want to use the permanent PCN rather than a 9,000 PCN.

What determines a <u>permanent</u> employee vs. <u>temporary</u> employee?? See attached from the Faculty Staff Handbook. Thank you!! ☺

CLASSIFICATION AND APPOINTMENT OF UNIVERSITY POSITIONS

PREAMBLE: This section defines the types of employment positions at UI, how they are created, and the terms and instruments of appointment. It was revised in 1983, 1988, and again in 1996. In 2002 many sections of the handbook, including this one, underwent comprehensive review and substantial revision to bring them in line with revised SBOE/Regents policy. Further information may be obtained from Human Resources (208-885-3609) [ed. 7-97, 7-00, 7-02, 9-06].

CONTENTS:

A. POSITIONS CLASSIFIED ON THE BASIS OF DURATION.

A-1. Permanent Positions. A permanent position is one that is established with the intention that it will continue indefinitely. Once established, it continues to exist, whether filled or vacant, until abolished. In summary, a position is designated as "permanent" solely on the basis of intent as to its duration, irrespective of the duties, the appointment, the funding source, or any other consideration. *[ed. 1-08]*

a. A permanent position may be a faculty (teaching, research, extension, or service) position or a staff (exempt or classified) position. [ed. 7-02, rev. 1-08]

b. A permanent position may be part time (50% or greater) or full time and it may be filled by an appointment that is temporary, probationary, fixed-term, continuing, or at the pleasure of the president or the regents. It is the position, not the appointment, that is permanent. [rev. 1-08]

c. A permanent position may be supported by appropriated or nonappropriated funds.

A-2. Authorization of Permanent Positions. Any permanent new position, regardless of funding source, requires Board approval prior to any form or manner of recruitment of applicants. [RGP IIB.3.a(1)] [rev. 7-02, ed. 1-08]

A-3. Temporary Positions. A temporary position is one that is established for a definite period: typically, the duration corresponds to the period of a grant, contract, or duration of work or project. Temporary hourly positions are governed by FSH 3090. [rev. 7-02, 1-08]

A-4. Authorization of Temporary Positions. Temporary positions may be established by the president or designee. There can be no commitment to continue a temporary position beyond the length of time specified when it is established; in particular, there can be no commitment to continue on appropriated funds a position initially established with nonappropriated funding. [ed. 7-02, rev. 1-08]

Faculty who have administrative roles at the unit level below dean

A PCN will be designated for the administrative position. Titles as defined in FSH 1420 E-2 a. & b. should be used in concurrence with department and college by-laws.

- Director
- Department Chair
- Department Head
- Program Head**

While holding the administrative appointment, the faculty member will reside in the designated administrative PCN. They will vacate their faculty PCN.

- The PCN will be permanently budgeted at the amount of the faculty member's shadow salary (base salary).
- **For new hires/appointments:** after the job accurately shows in NBAJOBS, units will process a temporary pay increase to add the administrative increment.
- **For annual reappointments:** after the appointment for the contract period is effective, units will process a temporary pay increase to add the administrative increment.

    o The EPAF category is **Faculty Change of Pay (FCHPAY)**
    o The job change reason is **Faculty Admin Temp Pay Change (CFCPY)**

- The salary agreement template (FY 14 draft) has been revised to show a faculty base salary, the amount of the increment, and the final adjusted base salary for the contract period. The salary agreement will need to be adjusted by the unit each year. It will not print with the increment amount. The responsibility of clearly indicating conditions at the bottom of the form when appropriate is also the responsibility of the unit.

- The adjusted base salary for the contract period is the salary amount to be used when calculating the allowed maximum summer salary for grant/sponsored program activity.

- When a tenured faculty member resigns from the administrative appointment or otherwise and returns to faculty, they will move into a faculty PCN that the unit/college is responsible for securing and budgeting.

- The newly appointed administrator moves into the designated administrative PCN which is re-budgeted to reflect their base faculty salary.

Interim appointments will follow the same process described above however the word "Interim" can be applied to the title and the .01 suffix will be used with the permanent PCN.

Options for holding funds and applying stipends include:

- Upon transition, if Dept Head/Chair PCN's are permanently budgeted with the stipend amount, the amount in NBAPBUD will be corrected to the faculty's base salary.
- Permanent salary savings will be held in your areas misc groups PCN or we can have a new misc groups PCN created to hold chair stipends only.