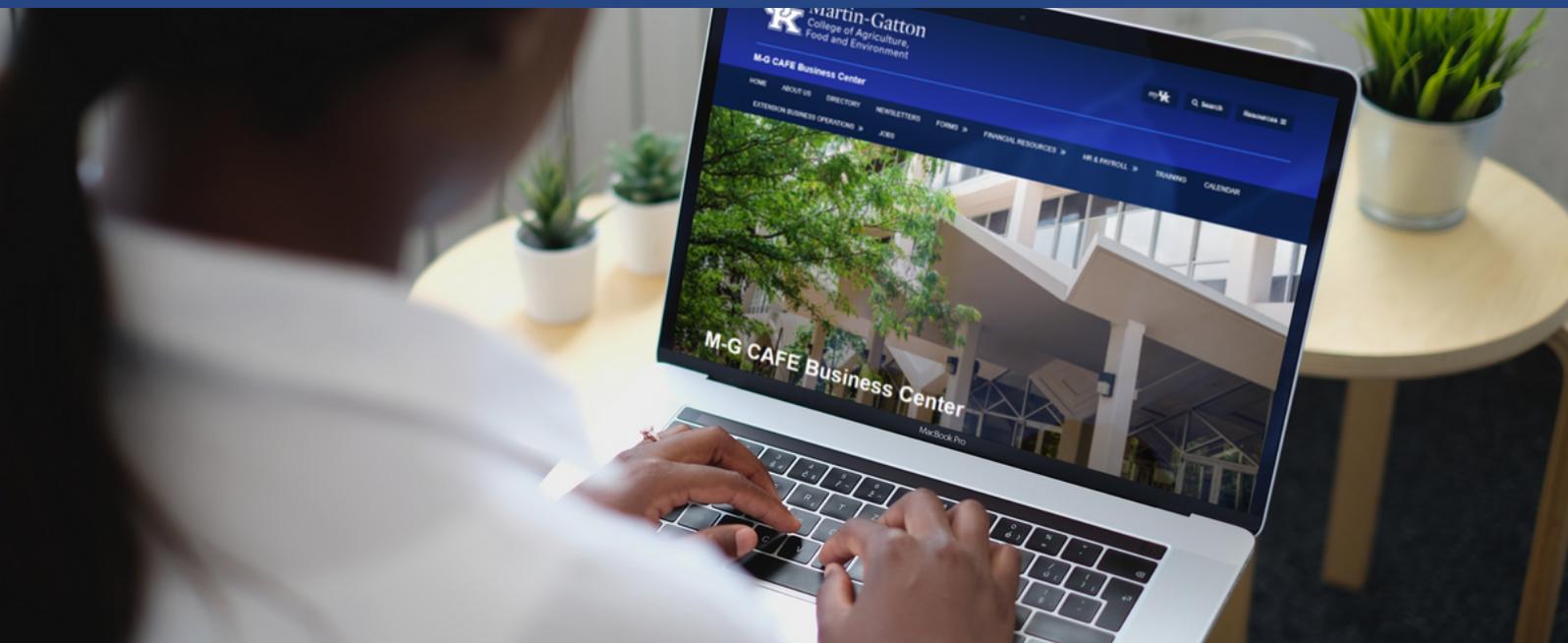


M-G CAFE Business Center Newsletter




Staff Spotlight



Dr. Lisa Collins



Tricia Coakley

2023 marked the first year of the Business Center HR Team taking over the management of the **Dr. Lisa P. Collins Outstanding Staff Awards**. We quickly learned that this was a monumental task that took months of planning and that it would take the entire HR Team to pull it off. We would like to especially recognize the invaluable support from **Dr. Lisa Collins and Tricia Coakley**. We truly appreciate your guidance, advice, and patience! It is obvious, to us, that you are committed to the success of staff in this college.

Business Center Staff

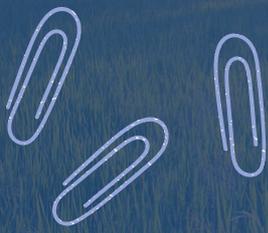
- Susan Campbell 7-5934
- Le Anne Herzog 7-2981
- Maggie Maynard 7-7143
- Adam Pickerill 8-5222
- Kayla Mincks 8-3906
- Sarah Habel 7-8967
- Jason Hardin 562-2994
- Christie Henson 8-5223
- Angela Knapp 7-9833
- Shelby Verhoeven 8-5374
- Mary Hammons 7-4722
- Cristin Costello 8-6680

Extension Business Operations

- Rebecca Amsler 7-7194
- Tina Ward 7-0132
- Zach Waller 7-4254
- Lindsay Poore 323-4499
- Ryan Martin 7-7241
- Natalie Simpson 7-1553

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HR NEWS

October 2023

ROUNDUP

Get ready for an extraordinary milestone as we mark the 50th annual gathering of Roundup!

Staff Appreciation Day is Friday, September 29, from 11:00 am – 1:00 pm EST

[Click Here to Register](#)

Good food, community, therapy dogs, chair massages, resource tables, awards, prizes, and yard games.

[Click here](#) to access this year's Dr. Lisa P. Collins Outstanding Staff and the Diversity, Equity, Inclusion & Accessibility Award nominees.





HR HUDDLE

The final HR Huddle of 2023 is coming up on October 11th at 10:30am. If you are an HR Admin, and have not registered yet – there is still time.

Click [here](#) to register

We can't wait to see everyone again and enjoy some interactive learning and networking time!

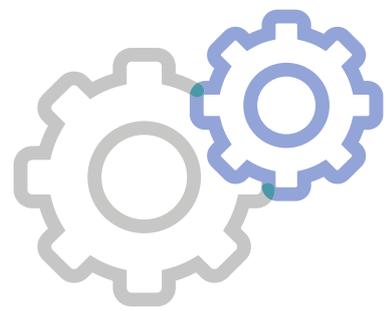


RETIREMENT CONFERENCE

October 2-11

- In person and online sessions available
- Session on topics from Social Security to Retirement Readiness
- Click [here](#) for more information and/or to register!





NEW VERSIONS OF FORMS

Please note that many of our college forms have recently been updated to include the new logo. To ensure that you are using the latest version, of forms, please access forms directly from our [Forms Page](#).



BONUS HOLIDAYS

An individual must be employed on or before Sunday, October 22, 2023, in a regular full-time or part-time position, in order to receive the special holiday/bonus days this year. Regular, part-time employees will receive the special holiday/bonus days on a pro-rated basis. The Official FY'24 Staff Holiday Schedule can be viewed [here](#).



HR NEWS

October 2023

Dates to Know

Payroll Earliest Retro Dates will set to the following:

Bi-Weekly 9/24/23

Effective 11/20/23 at noon

Monthly 10/1/2023

Effective 11/13/23

ECRT Deadlines for FY23, Quarter 1

Pre-Review: 10/17/23 – 11/6/23

Confirmation: 11/7/23 – 12/5/23

Events

College Staff Appreciation Day – 9/29

HR Huddle, Session 3 – 10/11

HR Admin Check-In Calls, Ongoing throughout the month

Upcoming Holidays

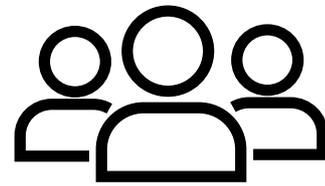
Thanksgiving 11/23 & 11/24

Christmas 12/25

Bonus 12/26, 12/27, 12/28, & 12/29

New Year's 1/1





WELL-BEING DAY REMINDER

Eligible staff may use up to two TDL days as personal well-being days each fiscal year. The purpose is for engaging in any activity that promotes the overall well-being of the employee. For additional details please see [HR Policy #82](#)

NEW FFY FUNDS



When processing payroll cost distributions, with an effective period of 10/1/23 – forward, please be mindful of using the correct federal fiscal year fund for the 235XXXXXXX accounts.

Note: The new funds are now available in CDEM.

CHECK-IN CALLS



For the last 13 years our office has conducted Annual HR/Payroll meetings. However, with the introduction of the HR Huddle Professional Development series, we have begun revamping our HR meetings. To compliment the Huddles, we have designed a new one-on-one relaxed chat opportunity. We are calling this new series Check-In Calls. Your invite should be coming soon! Don't miss this opportunity to let us know what your specific needs are. This is an excellent time to ensure you have the training and resources you need to best support your unit(s).

National Work & Family Month

UK HR Work-Life has invited guest speakers to offer presentations related to work-life and well-being to support your journey to manage your work and life responsibilities. This month will feature a **Tuesday and Thursday workshop series**. National Work and Family Month is an annual designation observed in October. During this time, workplaces across the country are asked to promote healthier and more flexible work environments. The theme of this year's month is

"The Whole Person Perspective." All virtual workshops are from noon to 1 p.m. via Zoom.

Tuesday Series

OCT
3

CAPTRUST webinar on retirement readiness.

[SIGN UP HERE](#)

OCT
10

ADHD/ADD support and strategies.

[SIGN UP HERE](#)

OCT
17

Managing stress when caring for children & older loved ones

[SIGN UP HERE](#)

OCT
24

Establishing priorities & building focus for productivity

[SIGN UP HERE](#)

Thursday Series

OCT
5

Boundaries tune up: Strengthening boundaries post-pandemic

[SIGN UP HERE](#)

OCT
12

Use KY Saves 529 plans to turn paychecks into diplomas

[SIGN UP HERE](#)

OCT
19

Using your personality to thrive at work

[SIGN UP HERE](#)

OCT
26

Self-compassion and saying "yes" to yourself

[SIGN UP HERE](#)

Other Work and Family Month events

Thursday, Oct. 12:

n Elder presentation on changes in Kentucky senior living facilities
Noon - 1 p.m.

Wednesday, Oct. 18:

n Working Parents "Real Talk" chat,
8:30 - 9 a.m.

n Elder caregivers support group,
Noon - 1 p.m.

Register for those events here.

 Human
Resources
Work-Life

FAST TRAINING UPDATES

NEW WEB-BASED TRAININGS NOW AVAILABLE

Two new courses, Employee Taxes and Non-endowed and Endowed Gifts: Advancement Fee Basics, have been added to the FAST Library and are available in myUK Learning.

Employee Taxes aims to provide a better understanding of the tax information on your paycheck and W-2. It covers topics such as types of payroll taxes, how they are calculated and reported, as well as federal, state and local taxes.

Non-endowed and Endowed Gifts: Advancement Fee Basics explains advancement fees including what they are, why they are assessed and how they are allocated. It also covers the responsibilities of employees related to this type of endowment fees.

Reference resources, including a handout and Quick Reference Guide (QRG) are available for each course in the FAST library. These documents can be found on the courses page of the FAST website. Click on 'Click here to access the Handouts and QRGs' and sign in using your linkblue ID.

COMPLETE UNIQUE COURSES TO MEET THE FAST COMPLIANCE REQUIREMENT

Mandatory participants in the FAST Program are required to complete two (2) unique FAST courses every six (6) months. Though courses can be taken as many times as you would like, at this time, they cannot be repeated for credit toward the compliance requirement. The next compliance deadline is December 31st, 2023.

Federal Fiscal Year-End Reminders

The fiscal year for our federal capacity grants closes September 30th. Please find the below reminders to help prepare for closing these accounts.

1. Ensure all pending travel requests and procard purchases are completed by the dates specified on the year-closing calendar at the latest. We recommend department business officers set their own travel and procard use cut-off dates to avoid late submissions. Travel occurring and items being purchased 9/30 or prior should charge to the FFY23 fund. Travel occurring and items being purchased 10/1 or later should charge to the FFY24 fund.
2. Review open Purchase Orders on your FCGs using t-code ME2K. Submit invoices to Accounts Payable and enter goods receipts by the dates specified on the calendar to ensure POs with items received prior to September 30th are recorded in the appropriate fiscal year.
3. Review your department's HR clearing account(s) to ensure charges have been moved to appropriate accounts. Z4 JVs may be needed to clear salary charges.
4. Take stock of items that may need to be recorded as account payable or prepaid expense accruals. Detailed documentation on these items is required. Contact your department's business analyst if you are not sure whether accruals are needed.

MARTIN-GATTON COLLEGE OF AGRICULTURE, FOOD & ENVIRONMENT					
FFY23 FEDERAL YEAR-END CLOSING SCHEDULE					
(Unless otherwise stated, all deadlines are 4:30pm on the due date indicated)					
AG Due Date	Type	Business Transaction	Dept.	Contact Information	
10/2/2023	JVs/Z4s	JV's making corrections to expenditures on federal capacity grants should be submitted by 10/02/23. Clearly mark all JV's as OY (Old Year) or NY (New Year) in the Doc Header Text of the JV before initiating the JV Workflow. This should help to ensure they are posted by AFRS before the month of Sept closes out.	CAFE Business Center	Business Analysts	cafeanalysts@ukcv.edu
No Later Than 10/2/2023	PO/Goods Receipts	All goods confirmations due for items received prior to, or on, September 30th. Please liquidate any remaining balance or work with Purchasing to get the remaining balance moved to the 24 fund no later than 9/30/2023.	CAFE Business Center	Business Analysts	cafeanalysts@ukcv.edu
ASAP No Later Than 10/2/2023	Procard Reports	All pro card reports for expenses charging to federal capacity grants with transaction dates of 9/1 or later must be completed via Concur. It is recommended that separate reports are created for expenses charging to federal capacity grants for OLD YEAR - do not comingle with expenses being charged to other cost objects. Regardless of editing deadline, completing this step will help to ensure that all charges are posted to the appropriate year.	CAFE Business Center	Business Analysts	cafeanalysts@ukcv.edu
No Later Than 10/11/2023	Reconciliations	Departments MUST reconcile Federal Capacity Cost Objects by 10/11/23. Any corrections as a result of reconciliations must be submitted by 10/16/2023 (Please see JV's Line below)	CAFE Business Center	Business Analysts	cafeanalysts@ukcv.edu
10/16/2023	Travel Reports	All Travel Reports completed via Concur must be submitted and approved by 10/16/2023. Analysts will review postings to ensure expenditures are charged to the appropriate fiscal year. *Any old year Concur reports submitted and approved after 10/16/2023 WILL be moved to state funds via JV.	CAFE Business Center	Business Analysts	cafeanalysts@ukcv.edu
10/16/2023	JVs/Z4s	JV's to make final corrections as a result of reconciliations must be submitted by 10/16/23. Please mark all JVs OY (OLD YEAR) or NY (NEW YEAR) in the Doc Header Text of the JV before initiating the JV Workflow from October 1st - October 14th. All JVs after October 1st for old year need to have approval from your business analyst to ensure we have the required fund open for posting of the JV.	CAFE Business Center	Business Analysts	cafeanalysts@ukcv.edu
10/16/2023	Accruals	Any goods/services received or travel expenses incurred prior to September 30th for which you have not processed a payment document must have an ACCRUAL established. Please contact your business analyst to have accruals recorded.	CAFE Business Center	Business Analysts	cafeanalysts@ukcv.edu

NOTE: "OLD YEAR" documents submitted to the Business Center after the federal year-end deadlines referenced above WILL require a Business Procedures

Find more FFY23 Resources on our website [here](#)

GRANT REMINDERS

OSPA Grants Training

We recently held a session on OSPA grants covering cost share, subcontracts, and effort on grants. The slides and training recording can be found on our [Grant Resources page](#) along with forms and other helpful guides.

[How do I view the cost share activity posted?](#)

- SAP t-codes available to view grant expenses can also be used to view cost share expenses and funding based on the fund used in the variables
- Sponsor funds start with 022* (**Direct Charges the Grants**)
- Cost share funds start with 001189* **MUST CHANGE FUND**

SAP tcodes

- [S_ALN_01000003](#) - Annual Budget Vs. Commit./Actual Lin
- [S_PLN_16000269](#) - Grants Management: Line Item Display

[How do I add an SIR to a grant account in SAP?](#)

- a. If the SIR is for all accounts in a department number or series of department numbers, email subawards@uky.edu with the department number(s) and SAP ID of the person designated as SIR for each department. A cross reference will be maintained in Research Financial Services, so the designation can be added to new accounts going forward.
- b. If the SIR needs to be account specific, email subwards@uky.edu with the account number(s) and SAP ID of the person designated a SIR for each account. This process will need to be repeated as new accounts are created.

Resources

[BPM E-50-2 Cost Sharing](#)

[OSPA Cost Sharing/Grant Matching](#)

[FI GM 320 Advanced Cost Sharing Training](#)

[Tableau View for Grant Ledger Report on Cost Share](#)

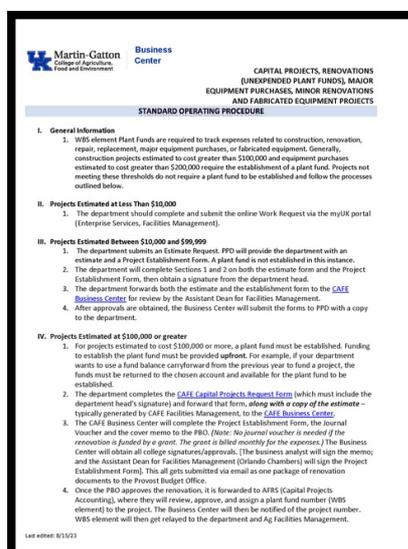
Capital Projects

We have revised our standard operating procedure for establishing capital projects.

A few reminders regarding this process -

1. A WBS plant fund must be created for construction projects greater than \$100K or major equipment purchases greater than \$200K. This process requires several forms to be filled out and approvals to be obtained, prior to projects being put out to bid or equipment being purchased.
2. Funding for the plant fund must be available/provided in advance. This means that the funds must be available in the cost object being used to fund the project, unless an exception to full funding is requested and approved at the university level (typically only applicable in instances where funding will come from insurance reimbursement).
3. In the case of major equipment purchases (equipment greater than \$200k) a single source justification must be obtained in order for the plant fund to be established.
4. It is recommended that departments start on the process to establish plant funds as soon as possible when they know about a potential capital project. Contact [Cristin Costello](#) in the Business Center for more details on this process.

The full procedure document, along with required forms, can be found on our website [here](#).



General Reminders

Users' Group Topics

Our next College Users' Group Meeting will be held November 7th, 2023 via Zoom. Request meeting topics by contacting Cristin Costello or submitting topics via [our request form](#). All departmental business staff should plan to attend. Find past Users' Group notes [here](#).

Voyager Card BPE's

If a Voyager card has declined, the user or department must first contact Fleet Services (859-257-3119) or the number on the back of the card and attempt to resolve the issue PRIOR to purchasing fuel for the vehicle on a Procard or personal card. A Procard or personal card may only be used as a last resort if the user has exhausted all attempts to use the Voyager card, and if this last resort is taken, a Business Procedures Exception request must be submitted as soon as possible after the purchase has been made for approval by travel services. If a BPE request must be submitted, the Voyager card number as well as the error message received by the user must be provided.

Fleet card policy - [BPM E-7-19](#)

Past Due Invoices

The Accounts Payable team has been working with departments to clear invoices older than 30 days. While progress is being made, there are still a significant amount of invoices past due. Business officers received a report on invoices in their department(s) last week. Be sure to review POs in your department to ensure invoices are paid on time.

Advance Approval Form

We have made some updates to our advance approval request form for events. You can find the new form attached and linked [here](#) on our website.

College approval is required for meals and refreshments and/or special activities totaling over \$1,000. Certain discretionary expenditures also require preapproval at any cost – these expenditures are listed on the form.



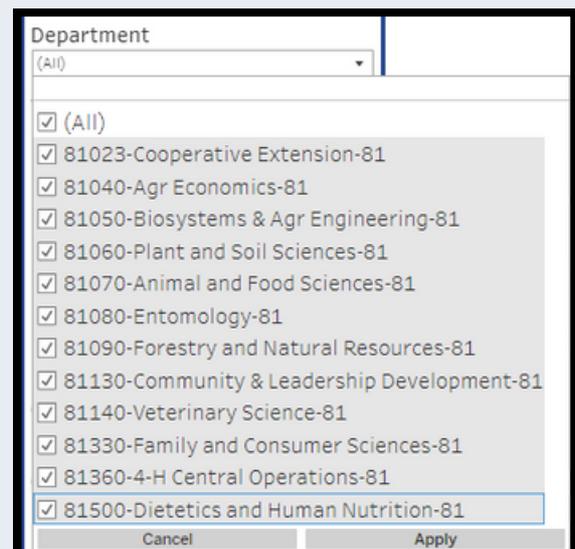
TABLEAU REPORTING TIPS

**DID YOU
KNOW?**

- Generate a List of Cost Centers
 - You can use the Tableau workbook “[UK Cost Centers with Details](#)” to obtain a list of all cost centers in your department. Cost centers may be filtered by active or blocked status. This report is helpful for determining which accounts should be reconciled each month, or determining accounts that need to be closed out.



- Multiple Variable Selections in Tableau
 - To select multiple adjacent options on a variable (cost center, WBS, dept, etc), simply choose the first option in the set, hold down the “SHIFT” key, scroll down and select the last option in the set. Doing so allows users to select multiple options much quicker than choosing each individually.



Find more Tableau Tips on our Quick Reference Guide [here](#)