UK College of Agriculture, Food & Environment

Business Center News Notes

Business Center Web Site: https://cafebusinesscenter.ca.uky.edu

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Staff in the Spotlight

We would like to give a shout out to <u>Cindy Stidham</u> and <u>Darlene Tipton</u> for taking the time to test the new CDEM application that is due to go live on March 1, 2021. We really appreciate their time and attention to this, as well as their suggestions and feedback for improving the application. Great job!

HUMAN RESOURCES

Performance Evaluations Toolkit

You can take an active role in the performance evaluation process. As you may know, the <u>CAFE Employee Resources</u> page has many helpful performance resources. Resources include a video tutorial on <u>How to Participate in Your Self Evaluation</u>, a <u>Self-Evaluation Toolkit</u>, and an explanation of the timeline. If you would like to explore some professional development opportunities, check out the <u>Employee Enhancement Programs</u> & <u>Professional Development</u> sections of the page. Additionally there is help for supervisors on the <u>CAFE Supervisor Resources</u>.

Resources & Timeline

- **2020 - Staff PE Timeline & Resources**
- **2020 - Extension Co. Supp PE Timeline & Resources**

Access the *How to Participate in Your Performance Evaluations* on our Video Tutorial page.

Supervisors that were not able to attend the *Avoiding Bias in the Performance Evaluation Process* session can access the recording on our Lunch & Learn page.

Hiring Pause Update

Effective 12/1/20, faculty and staff positions that are 100% grant funded are exempt from the hiring pause. For you convenience, the new Hiring Pause Exception Form has been linked up to our site.

Pro Tip – Please ensure that all related ZPARS/workflows include the following in comments: grant funded with grant number 3XXXXXXXXX, OR, if applicable, grant funded with Federal capacity grant 235xxxxxxx). Also remember to update the cost distribution information accordingly.

CDEM Update

The **Cost Distribution Entry Module** is scheduled to go live on March 1, 2021. Payroll Services and Research Financial Services are currently working on QRC's and training videos.

Payroll Retro Dates

The payroll earliest retro dates have been set to the following:
    Biweekly Employees: 9/27/20
    Monthly Employees: 10/1/20

Want to learn more about the payroll schedule? Watch our Video Tutorial here.

FES Deadline & Resources

FES deadline for January for cost distributions to be submitted to the College tab is January 25, 2021. Access our FES resources on the HR Administrator page here.

ECRT Deadline & Resources

The Pre-Review deadline for FY21 Q2 will be January 19 –February 8, 2021. Confirmation period will be February 9 – March 9, 2021. Access our ECRT resources on the HR Administrator page here.

GSAS/LCT Form – Each Semester

As a reminder, new GSAS forms (deadline for Spring is 1/29/21) and the Royster Memo Local City Tax Form are both required each semester.

Staff Degree Completion Form

As a reminder, the Staff Degree Completion Form is available to help maintain the accuracy of the staff degree information in SAP. Please share the form as needed, with employees in your department who have recently completed a degree.

Staff Professional Development Fund

The Staff Professional Development Fund is now accepting applications. To find out more please click here. The application process is quick and easy. You can access the application here.

W2 Reminders

Remember that employees have the option to receive their **W2** forms via myUK. If they signed up previously, the election should still be effective. Employees who are new to UK this year or did not get a chance to sign up previously can do that now.

Reminders
- If an employee's mailing address has changed, please ask them to update their address. Please note that address changes for W2 purposes will need to be made asap.
- It is also a good time to verify that their UK Alert information is up to date.
- Depending on county of residence, some employees will have multiple W2 documents to print, while others will have only one.
- The UK Benefits Office will be mailing the 1095 benefits forms to applicable employees.
- Employees who have separated will no longer have access to myUK. A hard copy W2 will be mailed to the address listed in SAP. For separated employees, HR administrators have access to enter address updates as needed.

New - https://mydocs.uky.edu/ is now an option for inactive employees to access documents such as past year W2 forms.

Resources
- Click here for a step by step guide for selecting the online **W2** forms.
- Click here for a step by step guide for updating your **address**.
- Click here for a step by step guide for updating your **UK Alert** information.
- Click here for the College of Law's website for the Volunteer Income Tax Assistance (VITA) – appointments begin in February 2021.
- Click here for the SAP Address Update QRG.

Emergency Closing

Now that we have entered the winter months, it is important to review the University Emergencies policy and FAQS. Please review the specific guidelines related to remote work under #7 of the FAQs document. If an emergency closing does occur, applicable hourly employees would record that time by selecting the Emergency Closing code on the Timesheet. For your convenience, the QRC - Recording Emergency Closing Hours is available.

Faculty Mentor Program

The CAFE Mentor Program has expanded to include faculty. The faculty mentoring program is designed to support new faculty in CAFE and stems from a suggestion from a recent Office of Diversity report. Mentors receive training, resource materials and weekly resource emails, as well as a monthly newsletter during the program. They are encouraged to have at least two meetings with their mentee and to touch base with them weekly. More information on the CAFE mentorship programs can be found here.

Service Awards

The college is recognizing 285 staff that reached a service milestone in 2020. The awards will be distributed in early spring along with a certificate, letter of appreciation, and information on additional ways to recognize the employees that have reached a milestone.

New Resources

Tableau - Looking for information on how to get started using Tableau? Take a few minutes to check out the resources on the SAP, BW & Tableau section of the HR Administrator page.
Well-Being – The Well-Being: Self Care series has been linked to our Video Tutorial page.

CONCUR

BPM E-5-1 – Reimbursement of Travel Expenses Update

Updated section IV F. Local Travel: The updated additions are in red and underlined.

Local travel is defined as less than 50 miles one way from the employee's workstation or the traveler's residence, whichever is greater. Barring exceptional business reasons, local travel does not qualify for an overnight stay or payment of personal meals. Based on the IRS guidance, if a trip exceeds the local travel distance and the traveler is in travel status for more than 12 hours, but the traveler chooses not to stay overnight, personal meals will be eligible for reimbursement at 75% of the standard per diem rate for the locality visited during the day.

Top 5 Reasons a Procard Expense Report is Returned for Revision

1. The procard transaction does not include a business purpose. See the Procurement Cardholder Manual for the definition of a business purpose.
2. The procard documentation does not contain an itemized receipt. See the Procurement Cardholder Manual for the procard documentation standards.
3. The procard documentation attached to the expense does not match the expense amount.
4. The travel expense report does not contain a business purpose.
5. Discretionary expenses need to be allocated to discretionary funds per BPM E-7-10.

New Accruals for CONCUR Expenses

Beginning with November month-end, UFS is now posting accruals for CONCUR Procard expenses. The accruals are for any procard expense in CONCUR that is not posted in SAP whether it is on an expense report or unassigned. Non-procard expenses for travel reimbursements, such as mileage or out-of-pocket expenses, would not be included in an accrual.
The cost object is determined as follows:
*   Unassigned procard expenses – default to cardholder cost object
*   Assigned procard expenses on the expense report – the cost object on the report header

The first accruals were for any procard expense through November.

Tableau Training for CONCUR

We will be conducting a training opportunity to learn the new Tableau CONCUR report. A CAFE specific report has been developed and will be available in January. An invite will be sent with details after a training date has been determined.

FINANCIAL

Best Practices as a Business Officer

As a Business Officer, it is essential to follow the guidelines set forth in [BPM E-1-3 Fiscal Roles and Responsibilities](#) and [BPM E-1-4 Internal Controls](#). We will continue building upon best practices to make sure each department is successful in understanding their financial position and are monitoring income/expenses appropriately:

- **Reconcile cost objects** – must be completed monthly and, preferably, reviewed at management level.
- **Complete monthly/quarterly fiscal year end projections** – it is very important to understand your department's financial standings in order to make decisions and monitor for fraud
- **Attend training opportunities** – available within CAFE and the university
- **Know your resources** – [University Business Procedure Manual](#) and [College Resources](#)

FFY20 Funds Closed

All FFY20 Federal Capacity Grant (235-prefix WBS elements) funds were closed as of 11/30/20. The final financial reports have been prepared. No further changes/postings can be made on any FCG using the FFY20 (025*20) funds that would impact the final reports. This includes payroll items such as 0027 screens, Z4 JV's, adding or removing effort, goods receipts, invoice postings, etc. Any postings after 11/30/20 will be removed by the CAFE Business Center. Please contact your business analyst with any questions.

Become an AD419 –Subject Matter Expert

CAFE Business Analysts will be conducting a training for ALL departments that have Federal Capacity Grants. The training will take place January 5, 2021 from 10:00 – 12:00PM. There will be time at the end of the session for a general Q&A session. We will be hosting the training via Zoom, so be at a computer station for your convenience. We would like for you to log in to the program and follow along as we work through the materials. By the end of the session you will become a Subject Matter Expert.

Project Financial Reporting (AD419)

The deadline to complete your departmental edits in the AD419 system is January 13, 2021.

Procard Applications

Because of the new Concur system, the UK procard administrators have no way to identify the business officer or any departmental contact on the application form. So, we are asking that you please note on the form or in an email to the Business Center any department individuals who need to be notified when a procard application is approved.

Also, the Procard applications have some recurring issues with them that we would like to address:

- The application asks for the "Applicant's SAP Person ID". This is actually just the 8-digit employee's ID number, <u>not</u> the SAP Link Blue ID.
- Remember to include the campus address or mailing address on the application.
- The department name needs to be added to the application in the area for "Second Line for Embossing (Dept Name)".

OTHER

Equipment Inventory

The Capital Equipment scanning period ended on December 15, 2020. If your department has equipment inventory exceptions, they must be finalized and the paperwork supporting those exceptions need to be submitted to Accounting & Financial Reporting Services by January 31, 2021. Please send Lost Equipment Reports to your CAFE Business Analyst several days ahead of the January 31, 2021, deadline to ensure adequate time for review and approval.

Courier Schedule

The COVID Courier Schedule has been updated and is located on the CAFE website at:
https://cafebusinesscenter.ca.uky.edu/sites/cafebusinesscenter.ca.uky.edu/files/cafe_courier_schedule_-_covid.pdf

Announcements & Upcoming Events

Mail Pickup

Reminder—Please make arrangements for someone in your department to pick up all of your regular mail from your departmental mailbox in N106 Ag North at least a couple of times a week. This room will be open weekdays

from 8:30—11:30am to pick up or drop off your mail. This is especially important now that we are distributing new employee masks to these departmental mailboxes where applicable.

Staff Update

Whitney Rogers, the current business officer for Family Sciences, has accepted a new position serving as the business officer for both Family Sciences and Dietetics & Human Nutrition.

Maggie Chapman is the new STEPS administrative assistant in the college's Small Business Development Center.

Next Users Group Meeting

The next Users Group Meeting (via Zoom) is scheduled for Tuesday, February 9, 2021.