CAFE ADMINISTRATIVE USERS' GROUP

August 10, 2021
9:00 am

Via Zoom

Agenda Items

1. **HR & Payroll** – *Le Anne Herzog*
    a. **Fall Semester – Student Hiring – I-9 Scheduling** – *August is the busiest payroll month of the year. Familiarize yourself with the pre-employment screen requirements and plan ahead for new employees to obtain their I-9's. You may use the scheduling tool on our web site, but please note that same-day I-9 appointments are generally not available. Remember to view the updated CAFE Student Wage Scale when adding students to the payroll. Also, just a reminder that the Royster LCT forms are required each semester. Check out the Graduate Student Resources on our web page at: https://cafebusinesscenter.ca.uky.edu/content/hr-administrator-resources.*
    b. **9027 Screen (Benefit Cost Distribution)** – *Use this screen for GA/RA/TA and Fellowship benefit cost distribution for grad students when the benefits are not paid from the same cost object as their salary. There is a step-by-step guide on our web site at: http://cafebusinesscenter.ca.uky.edu/files/qrg_-_9027_screen_entry.pdf.*
    c. **Part-Time Instructor Hiring** – *The start date should be August 1. Refer to the CAFE PTI Fee Schedule for the FY22 rates. All wage scales are published on our web site. Canvas access is granted as soon as the assignment is entered in SAP. A QRG for PTI Hiring SAP entry can be found at: http://cafebusinesscenter.ca.uky.edu/files/qrg_-_part_time_instructors_sap_entry_-_101220.pdf.*
    d. **Wildcard ID Reminder** – *It is very important to ensure that new employees obtain an ID card. On-campus employees may use the Wild Card Application at this link: https://www.uky.edu/wildcard/sites/www.uky.edu.wildcard/files/IDBadgeApp_081518.pdf . Off-campus employees should use the UK ID Card Request link: https://www.uky.edu/hr/records/uk-id-card-request. The card will be mailed to the employee. Both request forms are on the business center forms page.*
    e. **Moving Expense Reimbursement** – *The policy relating to this can be found in BPM E-7-8. The offer letter, approved by the Dean, **must** be attached to the ZPAR. The payment should be entered via SAP Screen 15. If you need a template for the offer letter, please contact Melissa Howard in the Business Center. (Templates will soon be added to our web page.) There are step-by-step instructions on the CAFE HR Administrator page under the SAP section, which can be found at: http://cafebusinesscenter.ca.uky.edu/files/qrg_-_relocation_expenses.pdf.*
    f. **Submitting Online PDF Form Video Tutorial** – *There is a new video tutorial for submitting online forms. Go to this link to view the tutorial: http://cafebusinesscenter.ca.uky.edu/resources/hr-payroll/employee-resources/video-tutorials*
    g. **Separation Workflow Pilot Update** – *The pilot will continue through the month of August. T-code SBWP is the easiest way to review and import documents. Make this a favorite in your SAP T-codes. The separation sheet should be signed/approved prior to importing. The workflow routes directly to HR (no stops at the department or college level). Make sure to enter leave payouts before the separation action workflow begins. The CAFE Business Center HR staff can assist by sharing screens if help is needed.*
    h. **Staff Professional Development Fund** – *Applications are being accepted any time. If you have questions, contact Melissa Howard. The link for applying for funds can be found at: https://cafebusinesscenter.ca.uky.edu/staffprofessionaldevelopmentfund.*
    i. **Fidelity and TIAA In-Person Options** – *Both carriers are again offering in-person consultations. To schedule an appointment, go to:* https://www.uky.edu/hr/benefits/retirement/consultations.
    j. **New SAP HR Field – University Work Site** – *For all new hires, remember to complete the new worksite field on the Work Address Screen 6. There are three options to choose from. It is uncertain whether this is required for current employees. We will let everyone know when we learn more about this.*

2. **SAP and Tableau** – *Chris Shotwell*
    a. **Update on SAP Access Request Form** – *The new SAP Access Request form (formerly the SAP Training Plan Request Form) is the updated form to request SAP access. This new web-based Qualtrix form has many improved features and is screen driven to move through the form, with "Previous" and "Continue" buttons for navigating. There are multiple ways to access this form, one of which is by clicking*

on the link at the top of the Quick Reference Guide attached as a handout to these notes. You can make this link a favorite to access the form quickly: https://uky.az1.qualtrics.com/jfe/form/SV_b8f7T7VIlYJWXAy.

b. **Tableau Reporting Update** – *BW will be decommissioned in December, if Tableau is working as it should by the end of the year. The IRADS team is currently working on our reports (Z-reports being recreated). Training is being developed for mainly the Budget vs Actuals reports (summary and details rollup reports). We are in the process of determining roles that everyone will need and granting access to Tableau folders. Tableau training details will be in the list serve emails and you can register for training from the link within the email. If you are currently not receiving the Tableau emails, let your business analyst know so that they can get you added to the email list. Tableau will be different, but we will adjust in time, and the business center will be able to assist you with this new reporting tool.*

c. **Tableau CONCUR Reports** – *The Download and Dashboard on Concur reports are not ideal for our needs; however, the analysts are working on some college customized reports to help with reporting. On Concur expense reports, remember when making edits (adding attachments, etc.) to expenses on a report, do it on the individual expense line in order for the documents to flow to SAP.*

3. Research & Grants – *Sean Scott*

a. **Participant Support** -*The Participant Support (training) expense category G/L of 530172 should **not** be used for UK employees or students. This G/L should only be used for non-UK related participants when charging grants. A different G/L (537010 or 537030) should be used for training grants for students. There will be a special training and quick reference guide developed by our CGO's to assist with this topic. If questions, please contact Kim Hall or Sean Scott.*

4. Budget & Finance

a. **Unit Budgets** – Chris Shotwell – *Due to the FY22 budget process being so compressed, the Unit Budgets will be distributed a little later than normal, to give the business center a chance to provide the units with a little cleaner budgets than were created during the budget process. They should be distributed in early September. Units will also receive next month reports on all of their commitments from the Dean.*

b. **Procard Application Signature Requirement** – Chris Shotwell – *The UK Procard Administrator's Office has made us aware of the closer look they are doing at Procard application signatures. They are requiring the supervisor of the Procard applicant to sign the form. In addition to the supervisor's signature, the college is requiring departments to obtain the signature of the department head. While there is no designated space for this extra signature/approval, the department head can add his/her approval in any blank area of the Procard application form.*

c. **Procard Training Announcement** – Chris Shotwell – *We have just learned that the upcoming procurement card trainings will **only** be required of cardholders who did **not** already attend the procurement card training offered in the initial round of FATT modules. Those Procard holders who were identified for the Financial Foundations Training (required in Spring 2021) were removed from the email list. This upcoming Procard training is identical to the Procard course from Financial Foundations and will **only** be required of those cardholders who have not already completed the course. This training will be a 30-minute web-based course held sometime in September. Cardholders will have 6 months to complete the course. If not completed in 6 months, their Procard will be suspended.*

d. **Federal Year-End** – Catherine Anderson – *The Business Center is reviewing the Federal Year-End Manual and will schedule a Federal Fiscal Year-End training session in September. Units should look closely at all Concur expenses, CAS items, PO encumbrances, etc. on their federal capacity grants. A year-end calendar will be sent out within the next few weeks. The Business Center will work with Cara Nelson in AP concerning due dates for Concur transactions, and that will be reflected in the year-end calendar that will be distributed to our units.*

e. **BPE Process** – Catherine Anderson – *Attached as a handout to these notes is an updated BPE guidelines document. There are no changes, just some things that are being emphasized to ensure that we can get your BPE's processed as quickly as possible. The main issues with this form are noted and highlighted on the attached document. Please pay close attention to these requirements. The updated guidelines will soon be added to our web page. Reminder that units should send all BPE's to their business analyst to be reviewed and processed.*

5. Other

a. **COVID Procedures Update** – Susan Campbell – *Andrea Higdon, the college's Emergency Management Systems Director, has prepared a document, and it is attached to these notes as a handout. This updates the latest UK Covid-19 policy and guidelines. Read this document carefully as it includes good references, links, phone numbers and email addresses. Be advised though that these policies and guidelines can change at any time.*

b. **New Position** – Susan Campbell – *Susan introduced Maggie Maynard as the newest member of the CAFE Business Center. She will be in an administrative staff role and will begin on Monday, August 16. She* *will be located in S103-A Ag North. We welcome Maggie to our team! We would also like to introduce Carolyn Goodrich to the college. She is the new administrative support staff member in Regulatory Services.*

c. **Business Analyst Unit Update and Subject Matter Assignments** – Chris Shotwell – *The Business Center structure will be modified slightly, with changes in our personnel. The unit assignments have been redistributed somewhat, and there will be an additional layer of assignments relating to subject matter. It will be a "hybrid" structure that will help improve the timeliness of getting issues resolved for the units.*

d. **Additional Notes** –

   i. *The Business Center prefers that all departments reach out to their staff before contacting the service units across campus. The most important reason for this is that for some procedures there are college requirements that take precedence over the UK procedures, and those service units may not be aware that we have additional policies in place. Also, it allows for the analysts to be aware of what types of issues their units are experiencing.*

   ii. *With the uncertainty of when everyone will be back to in-person work locations, it is advisable for all staff to make known to those they work with what their remote and in-person work schedule is. This can be done by an additional line in your email signature block or however you prefer to make this available to everyone. The Business Center will provide their schedule of which staff will be in the office of which days as soon as the schedule is finalized.*

   iii. *Susan announced the retirement of Kim King after 37 years of UK service. Effective date of Kim's retirement is August 20, 2021.*

****NEXT MEETING: Scheduled for November 9, 2021, at 9:00am**

http://cafebusinesscenter.ca.uky.edu