

# COLLEGE OF AG ADMINISTRATIVE USER'S GROUP

November 12, 2014

9:00 am

E.S. Good Barn, Gorham Hall

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## Agenda Items

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### Guest Speakers

Tammy Akin (Wellness Specialist) – *The UK LiveWell Program replaces HealthTrac Rewards as the new health management program for UK employees. The UK LiveWell initiative is the foundation of a 5-year strategic plan that aims to improve health and wellness of the UK community, with the first step being to register on the check-in site, which can be found on the following link: <http://www.uky.edu/hr/wellness/ongoing-support/uk-livewell-check-in>*

Megan Lucy (Assistant Dean Collins' Office) – *The faculty database will now be centralized and maintained in the CAFE's Assistant Dean for Academic Administration's Office. The implementation took place at the end of October, and the go-live date is November 21. Dr. Collins' updated web site contains information and instructions about new faculty appointments. Also, a handout which includes the guidelines and the new faculty database worksheet form are attached. The link Megan shared at the meeting is: <http://administration.ca.uky.edu/newfaculty>*

Dylan Merida – House Bill 5 / Data Security Breach – *As a UK IT Security Analyst, Dylan gave a power point presentation on data security laws that will affect state and government entities and that will become effective January 1, 2015. He wants to raise security awareness to campus IT and colleges before the law goes into effect. More on data security (and best practices) at a future Users Group meeting. In the meantime, if you have any data security issues or questions, please contact your IT staff person.*

### 1. Sponsored Programs – Gina

- a. DOE – *The deadline has passed for federal grant corrections on DOE's. Next DOE deadline is December 9.*
- b. Federal Year-End Updates – *No more federal grant corrections on any transactions for FFY14 after November 30. If there are any remaining balances on purchase orders for FFY14, please liquidate those amounts. Check your postings for FFY14 accruals. If any questions, contact Gina.*

### 2. Procurement & Travel –Kim

- a. Purchasing Newsletter Info
  - i. *Read carefully Purchasing's quarterly newsletters for info updates and changes in policies and procedures.*
  - ii. *An updated approved caterer list is on Purchasing's web site. Questions, contact Wendy Brown.*
  - iii. *When hiring independent contractors, refer to BPM E-7-3. A summary of E-7-3 is attached as a handout.*
  - iv. *The vendor database undergoes regular maintenance and removes vendors that are no longer active. A vendor which has not been used for two years will require a new vendor app.*
  - v. *More punchout catalogs in SRM will be available soon.*
- b. SRM and Internet Explorer – *A handout is attached that includes instructions for users to follow to help SRM and IE be more compatible when making purchases from punchout catalogs.*
- c. Establishing Cost Centers – *Attached is a handout of procedures for establishing cost centers. This is also on our web site.*
- d. Travel Policy Changes – *A few travel policies were changed in early October. On 10/20/14, an email was forwarded to everyone that included a copy of BPM E-5-1 policy with changes highlighted.*
- e. Mail Procedures – *A three-page handout is attached with CAFE mail courier procedures, mail box list and courier route locations. Please make sure that personnel in your department handling your mail distribution see these handouts. The business center will assess whether it's feasible to add a couple of additional locations to the courier's current mail route.*

### 3. HR & Payroll – Le Anne / Susan

- a. Bonus Holiday Load Reminder – *There is an attached handout which includes HR and payroll info dates. November 2 was the cut-off date for new hires to receive special holidays/bonus days. If you load an eligible new hire into SAP after November 2, email [saphrsupport@uky.edu](mailto:saphrsupport@uky.edu) to request that the appropriate holiday hours be manually loaded.*

**\*\*NEXT MEETING: Wednesday – February 11, 2015 @ 8:30 am (Gorham Hall, Good Barn)\*\***

- b. Performance Evaluations Release Date – *Evaluation/Entry dates are from December 2 through February 16. Always make sure that all JAQ's are up to date. Specialists must be evaluated every year. One new change is that users do not need a different password for the PE system. The user's link blue ID and password for their computer access will also be used for the PE system.*
- c. ZPAR/Holiday Payroll Schedule – *Review attached handout for ZPAR deadlines and changes in the payroll schedule during the upcoming holidays.*
- d. W2 Online Option / Address Update Reminder – *Employees still have the option of receiving their W-2 forms online. Once employees have opted for this, they do not have to sign up for the online version again. There are many advantages of electing the online version (see attached handout). Also, employees are reminded that this is a good time of year to make sure their home addresses are up to date in SAP.*
- e. Directory Information Instructions – *Employees should make sure that their addresses (including speed sorts), phone numbers, and email addresses are correct in both Outlook and the UK Campus People Directory. See attached handout for instructions on how to update your directory information; the handout also includes a helpful link to the directory.*

#### 4. Budget & Finance – Susan

- a. Fund Balances – *The FY14 fund balances have been carried forward. The transfers to the departments should be done the first week of December.*

#### 5. Other

##### a. Business Center Update

##### i. New positions/locations – *The following positions have now been filled in the business center:*

- **Christine Tawasha** (Administrative Services Assistant Senior) will be located in S103-A Ag North, with a start date of November 17, 2014.
- **April Collier** (Administrative Staff Officer II) will be located in S103-A Ag North, with a start date of December 1, 2014.
- **Chris Shotwell** (Director of Budget Operations & Financial Analysis) will be located in S101A, with a start date of January 5, 2015.

##### ii. Introduction of CFO and other new staff

- **Stephen Sizemore**, CAFE Chief Financial Officer, located in S103C, started on September 8, 2014. Since arriving in the business center, he has been meeting with the department heads and participating in the hiring and interviewing of candidates for the vacant positions in the business center. He advised everyone that we are all still waiting to learn more about the budget model and hope to have more information about that at an upcoming meeting.
- Other new college staff were announced/introduced to the group: **Adam Lybarger** in 4-H, **Erin Pyrek** in KTRDC, **Robin Atkerson** in Vet Sciences, **Paula Cole** in Animal & Food Sciences, and **Jayme Ware** in the Dean's Office.

- b. New department – *The Food Connection (81026) is the newest department in the college. It is a campus-wide program, as it was established as a partnership between our college, UK dining services, and Aramark. Currently, former Dean Smith is heading up this department. It will focus on student research and Kentucky Proud food products.*
- c. Breakfast Meeting in February – *The next Users Group meeting, on February 11, 2015, will include a breakfast and will begin at 8:30am.*
- d. Sign-In Sheet
- e. Relay meeting info to other departmental staff
- f. Equipment Inventory – *Toni Kirkner (Plant Assets) held a breakout session for the users that are responsible for their department's equipment inventory. There are a few new changes, including the scanning equipment, that are outlined on the attached handout. If the staff member(s) who handle inventory were not present at the meeting, the handout and information provided by Toni should be relayed to the appropriate departmental personnel following this meeting.*

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## **FACULTY DATABASE GUIDELINES**

**Our original target for this change was January 2, but we are moving the implementation date up to October 27.**

Here are the changes that will occur October 27 regarding the FDB:

1. For those with Update access to the system, access will be changed to View.
2. For new faculty appointments (including adjuncts and PTIs), departmental users will now include the attached completed form with the appointment packet (this form and new instructions will be posted on the Administrative website as soon as possible). After an appointment packet is reviewed in the assistant dean's office, a scanned E02 appointment form and any other needed forms will be emailed to the departmental user for faculty member and chair signatures. Remember electronic signatures and scanned correspondence are accepted.
3. All faculty actions that currently are addressed to Ruth Cremeans should now be addressed to Megan Lucy, L-104 AgN, 0091
4. College personnel will no longer be collecting or entering SSNs or other data in the FDB
5. In addition, any staff personnel actions, such as retirements, post-retirements, phased retirements, will also be handled by the assistant dean's office. Please address this paperwork to Megan Lucy.
6. Please note, the changes in administration of the FDB do not affect the GSAS system or the TADB system. No changes for these two systems are planned at this time.

# New Faculty Demographic Worksheet



Upon appointment of a new faculty member, first enter the faculty member into IRIS SAP, and then submit this form along with all required attachments to **Megan Lucy in L104 Ag Science-North**.

The information will be entered into the Faculty Database.

Last Name \_\_\_\_\_ Suffix \_\_\_\_\_

First Name \_\_\_\_\_ Middle Name \_\_\_\_\_

Birthdate \_\_\_\_\_ Gender \_\_\_\_\_ Ethnicity \_\_\_\_\_

Race (select all that apply)

American Indian or Alaskan Native	Asian	Black
Native Hawaiian or Other Pacific Islander	White	Other

IRIS Person ID # \_\_\_\_\_ Department \_\_\_\_\_

Title Series \_\_\_\_\_ Initial Rank \_\_\_\_\_

For Associate or Full, is the faculty member tenured upon appointment?      Y      N

Effective Employment Date \_\_\_\_\_ Assignment Period \_\_\_\_\_

At what level will the faculty member teach?      Undergrad      Grad      Neither

Required attachments for all new appointments:

- Signed offer letter
- Career CV
- Original, official transcripts of highest degree\*
- Other relevant documents

Additional attachments required for full time faculty appointments:

- Correspondence indicating the dean has approved filling the position
- Chair's memo requesting to fill the position
- Position announcement

For Adjunct appointments only:

- List of all full time faculty members in department and their written opinions on the appointment.

\*If the faculty member's highest degree does not match the discipline of the hiring department, also attach transcripts of the next highest degree(s), regardless of discipline(s). If the faculty member has more than one terminal or professional degree, attach these transcripts.



**William Harris**  
Director

# Purchasing Newsletter – October 2014

## Updated Catering Information

The University has updated the approved caterers list in an effort to ensure the safety and well-being of University students, faculty, staff and guests. Departments must select from the Approved Caterers for provision of food services to University-sponsored programs. The formal definition of catering has been revised along with changes to procurement card policy for catering purchases. The current approved list and related information can be found on the Purchasing website at: <http://www.uky.edu/Purchasing/catererslist.htm>. Questions can be directed to Wendy Brown, phone: 257-5404, email: [wiholl2@uky.edu](mailto:wiholl2@uky.edu).

## Reminder – Independent Contractor Forms

Reminder: Transactions involving purchase of services from individuals must follow the Independent Contractor process outlined in Business Procedures Manual Reference E-7-3 (<http://www.uky.edu/EVPFA/Controller/files/BPM/E-7-3.pdf>). An independent contractor providing services to a department must be approved by Human Resources-Compensation via submission of a completed Worker Status Evaluation Form prior to beginning work. If approved by HR as an Independent Contractor, the Scope of Work form must also be completed and attached to the ECC Requisition/SRM Shopping Cart or PRD. The BPM reference fully outlines the process and contains web-links to current versions of both forms.

## Toner Scams

In recent weeks the University has encountered an increase in attempted toner scamming of departments. Scam toner companies may randomly target and call University departments claiming their copier is due for new toner. They may (fraudulently) claim their company is the toner provider for the University. Some scam companies also attempt to sell copier manuals to departments. Examples of scam companies which have targeted the University are Internal Business Systems Inc., Supply Services Inc., and IDCservco. Remember, toner and maintenance for all copier units on the Managed Print Services (MPS) program are automatically provided at no additional charge by Ricoh-USA. An MPS machine is identified by a See Blue-Print Green sticker with the machine ID number. Additional information can be found at: <http://www.uky.edu/Purchasing/docs/tonerscams.pdf>. If you are contacted by what you believe is a potential scam company, please convey the details to [ukmps@uky.edu](mailto:ukmps@uky.edu).

## Cleanup of Vendor Database

In conjunction with an Internal Audit initiative and in order to maintain clean and manageable data, the University vendor database now undergoes a regular cleanup process for entities which are no longer active. The program runs on a continual basis and invalidates any vendor for which no orders have been placed for two or more years. Any vendor which has not been used within the previous two years will require completion and submission of a new vendor form (<http://www.uky.edu/eForms/forms/vendapp-sap.pdf>) to be reloaded.

## Recent Changes in Commodity Assignments

Some larger commodity groups recently have been reassigned within the division. Debbie Konichek now manages all purchases related to laboratory and scientific goods and services, along with industrial and commercial gases, waste management, and pest control. If needed, Debbie's contact information is phone: 257-5792, email: [dkonichek@uky.edu](mailto:dkonichek@uky.edu). Along with other commodities, Becky Purcell now manages all purchases related to commercial printing, promotional items, advertising services, and agricultural needs, along with the OfficeMax office supplies contract. Becky's contact information is phone: 257-5479, email: [rpurcell@uky.edu](mailto:rpurcell@uky.edu).

The updated Commodity Assignment listing can be found on the Purchasing Division website at: <http://www.uky.edu/Purchasing/docs/commoditylist.pdf>.

## Reminder – SRM Punch-out Catalogs

Four punch-out catalogs (OfficeMax, Dell, CDW-G, and MoreDirect) are now available for use through the Supplier Relationship Management (SRM) procurement system, with additional catalogs to be loaded within the coming months. With the exception of hospital areas, all purchases from these four suppliers, regardless of dollar amount, should be conducted through the SRM e-procurement system; other than hospital areas, procurement card should not be used for purchases from the above suppliers. Additional information and help cards for the punch-out catalogs can be found on the Purchasing website at: <http://www.uky.edu/Purchasing/SRM.htm>.

## PAYMENTS TO INDIVIDUALS

(Based on BPM E-7-3)

**Independent Contractor** – an individual that provides services for an established fee to the general public on a consistent basis and must also meet the conditions in [E-7-3.II](#) (Definitions).

**Honorarium** – gratuitous payments of an amount determined by UK made to visiting speakers, guest lecturers or others, solely to express appreciation for their service to UK when no contract exists and payment is not expected or legally due.

### Independent Contractor Payment Procedures

- Complete a Worker Status Evaluation Form (prior to retaining the individual) and submit form to HR Compensation. HR will return the form to the department with the appropriate classification. If the individual is determined to be an independent contractor, proceed to next step.
- The individual should complete the Independent Contractor/Client Scope of Work form **and** a Vendor Application form or a W-9 form (if not already in the UK Purchasing database).
- Submit the vendor form **or** the W-9 form to Purchasing to establish a vendor number in the database for the individual.
- Select the appropriate method of payment for the type of service being provided by the individual, using the ***Purchasing/AP Quick Reference Guide***. Create either a PRD or an SRM shopping cart.
- Attach the Worker Status Evaluation Form **and** the Independent Contractor/Client Scope of Work form to the PRD or shopping cart. Also, attach the vendor's invoice to the PRD, or route the invoice (with a Vendor Transmittal Form) to AP if paid by purchase order.

### Honorarium Payment Procedures

- A Worker Status Evaluation Form is **only** required if the honorarium is greater than \$2,000.
- No Independent Contractor/Client Scope of Work form is required.
- Complete a Vendor Application Form or a W-9 Form and submit to Purchasing.
- Create a PRD for the gratuitous payment, using PRD catalog code #90000030 and G/L 530141.