BSAG Agenda

Wednesday, December 14, 2022
3:00 – 4:30 p.m.
Location: Delta Innovation Hub (in-person only)

I. Welcome and Thank You Remarks: Anjali Dougherty & Shawn Hill

    I.   Asked BSAG participants to potentially share/host meeting spaces and share about what they do. Thank you for the responses! We now have most of 2023 booked.

II. Committee Reports

- **Faculty Affairs Committee:** Carly Surratt; Mike Gorman

  - Overview of future trajectory; call for faculty reporting

  - **Reporting group:** Asking about effort reporting; UGA Elements vs what's in the system. Elements used to have something called workload that was basically allocation of effort; we're not using Legacy anymore and have not been able/have opted not to continue hosting that data because it can't be official resource .

- **Finance Committee:** Kathy McCarty; Shelly Terrazas

  - *Proposed [Find My Expense Manager](#) site:Jennifer Dunlap, Shawn Hill*

    - *Travel policy compliance initiatives*

    - *Strategy 1 (travelers): refresh on travel policy;automated emails to travelers when TA is approved; 3 short videos on key points; postcard to all employees; travel collateral to all faculty new hires in orientation packet; travel flyers covering key points; find my expense manager webpage; comprehensive travel training in PEP*

      - *Sharing proof of concept of find my expense manager: we need your feedback!*

      - *Security: CBOs will be given this link and it's on them to share with whoever they're comfortable with also SSO*

      - *Editing is important; reviewing and confirming information*

    - *Strategy 2 (approvers):comprehensive approver training in PEP; provide CBOs with reports to see completion rates for team; comms campaign to approvers; parts of strategy 1 are relevant here, too*

      - *Question about slimming down of travel policy in the past years; request for resources providing context and examples*

      - *Travel team is always happy to come meet in person and conduct these conversations in the units*

- *GASB 87 Process Updates:* Darlene McConnell, Bob Currey, Jennifer Dunlap, Craig Mathews

    - End-of-year roundtable; FY22 was first year of implementation in terms of leases

    - *Conducted interviews/reviews with users and identified paint points:* eliminated need to complete lengthy questionnaire; new process for exclusions, those leases have a new process for documentation now

    - *Create UGAmart "pre-screening" questions:* first 1-2 questions on previous form and will be on requisition module (i.e., does GASB 87 apply?)

        - *Becomes record of assessment;* keeps users from having to fill out every time; provides documentation for audit; simplified and modified workflow for end user and for team processing

        - *This will prompt requisitioners to acknowledge GASB 87*

            - *Is it for all requisitions?* Yes!

    - *Digitized GASB 87 form*

    - *Launch and implementation will ideally take place soon after January 1 but definitely before BPSS; training will be provided as well*

    - *Accounting team walked through Smartsheet form*

        - *Smartsheet entry will generate email*

    - *Following GASB 87, GASB 96 is coming (SBITA / Subscription-Based Information Technology) → all leased IT items like Zoom, Adobe, Oracle, etc.*

        - *These need to be recorded similarly to GASB 87 and will follow a similar process and information will be coming 2023*

        - *A bit more complicated*

    - *Start thinking about your technology leases but until campus training begins, continue with same process for now*

    - *This covers a database of information*

- **Foundation Committee:** Elizabeth Prince; Sadie Brown
    - **MIH codes:** a hierarchy of units; not used in UGA Financials

        - *Foundation uses MIH codes and that's how FAME routes things*

        - *Some things are stuck in the wrong places right now*

        - *OIR had an initiative to translate that hierarchy into reporting*

        - *FAME uses the academic unit to drive workflow; not so granular*

- - - Send a correction email to ugafbusiness@uga.edu
    - Peoplesoft class codes can be corrected to correct Peoplesoft ID too
    - *Where are MIH codes: can be grabbed from OIR, not currently on website; Shawn Hill has a list and so do reporting liaisons*
      - If you need additional MIH codes added, contact OIR, too
    - *Recap: FAME uses 8-digit numbers from FMS to drive budget processes*
      - *Workflow: that's where the MIH (master institutional hierarchy) codes come into play*
  - *Scholarship survey:* got great responses and feedback prior to Thanksgiving, more takeaways/next steps coming
  - *UGAF is on TeamDynamix!* Submit a ticket
  - *Employee awards:* considering breaking up and adjusting workflow; stay tuned (UGAF + HR + Payroll)

- **Human Resources Committee:** David Maddox; Chandra Echols
  - *New Supplemental Pay and RSA Process:* Chris Allinger, Russ Ramsey
    - *Developing a new process that is easy to use, increases productivity, improves transparency with reporting/metrics*
    - *Been piloting with a variety of groups; more opportunities coming*
    - *Tentative timeline: December 2023 completion of development, April 1 2023 go live (tentative)*
    - *Plan to have a recorded kick off session in feb and will include anyone who wants to be included; submit real examples during this time; testing is crucial*
    - *Feedback: what is the scope? Is everything previously going through sup pay and MSS going through this process?*
      - *Plan for supplemental pay: yes*
      - *RSA will continue to use MSS*
    - *April 1 go live is taking process for RSA and admin supplements, anything with HR forms and transfer to new process; potential for versioning but not ideal; initial scope is RSAs and supplements that typically go through MCOP; request for more specific documentation regarding what will be included in April 1; opportunity to clean up forms and language; supplements that are TBD end date: this will be included; stay tuned*

- *USG Emails to Terminating Employees – Proposal*
  - *New process that system office would like to begin*
  - *Terminated employees can't access pay stubs, W2s, or any other data*
  - *Employees can be more proactive: for example, an address can be updated, forms can be saved and downloaded, etc.*
  - *PROPOSAL: run a query every month looking for employees to be terminated in 30-90 days*

- o *Would be outside UGA comms pool and would come from USG/central comms*
- o *Call for concerns/feedback: most advance terminations are probably faculty; reminder could be included in UGA employee exit packet/procedure; shorten from 30–90 days to 7-10 days instead for maximum efficacy; previously there's been guidance to wait to enter termination dates*

- **Reporting Committee:** Brooke Rooks; Hailey Normandia; Susan Cowart
  - o *UGA Foundation report + UGAF Foundation report: will be merging and demo is coming out soon for reporting group to review*
  - o *Double Dawgs dashboard: workgroup with several colleges and demo coming up in January; development phase but will be a planning tool for Deans*
  - o *Participation from reporting liaisons!*

III. Other Business
- **BPSS Changes:** Position Inactive/Vacant Position Cleanup
- *BPSS: assessing how things go each year; goal of excluding inactive positions to improve efficiency and remove unnecessary positions*
  - I. *Proposing changing filter on the data pull; creating queries in OneUSG connect*
  - II. *BOR asking for funding of vacancies information, this is also incentive*
  - III. *Questions and feedback welcome at hrweb@uga.edu*
  - IV. *It's essentially a filter; position doesn't disappear but is just not reflected in information pulled by query; shouldn't make things difficult to reactivate if needed*

IV. Open Forum Discussion
- **Open Discussion**