



# Business Services Advisory Group



# Welcome and Announcements

*Co-Chairs: Anjali Dougherty & Shawn Hill*

---



# Welcome and Announcements

- New Co-Chairs: Welcome Bob Currey (Finance), Blake Waldrop (Finance) and Josh Hanna (Reporting).
- Thank you, Brooke Rooks, for your leadership on the Reporting committee!
- New processes
- New BSAG format and schedule



# Faculty Affairs Committee

*Co-Chairs: Carly Surratt & Mike Gorman*

---





Business Services Advisory Group

*Finance & Administration*

UNIVERSITY OF GEORGIA

# Faculty Offer Letter Templates

Update on offer letter templates **to  
be released later in August.**



# Finance Committee

*Co-Chairs: Kathy McCarty, Shelly Terrazas,  
Bob Currey, and Blake Waldrop*

---



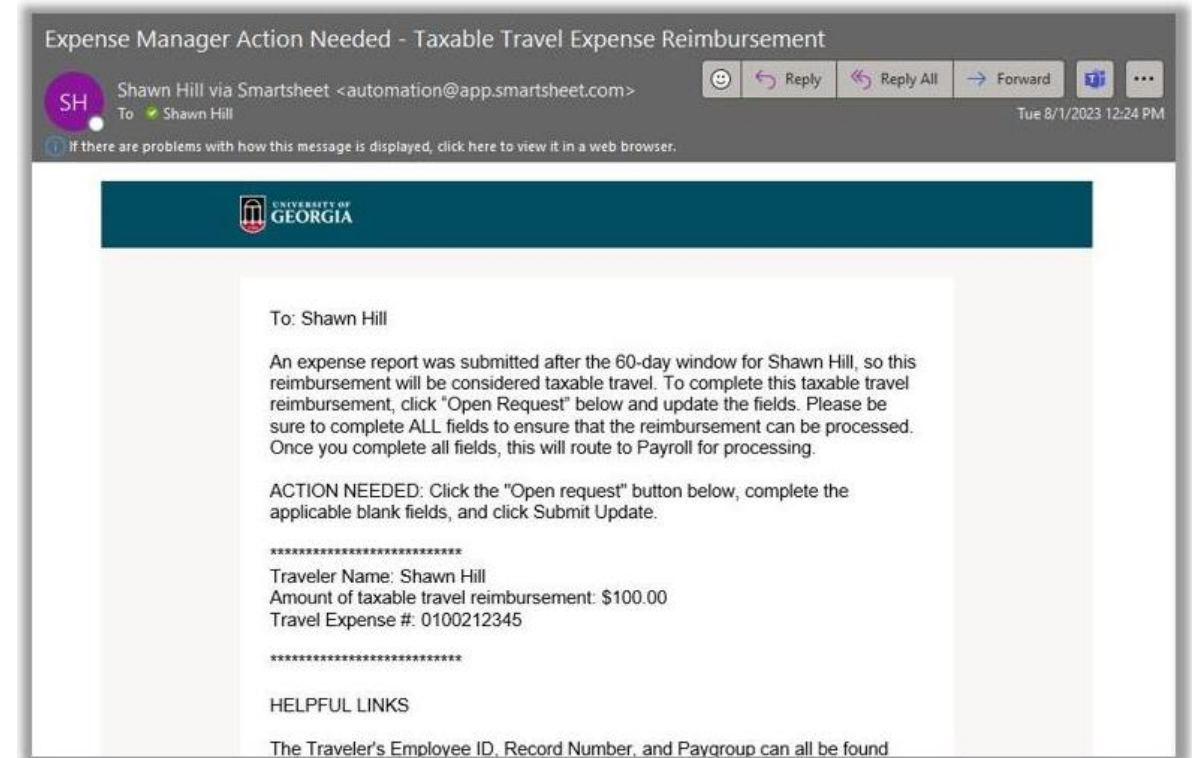
# New Taxable Travel Process

## Planned process change:

1. Submit expense reports over 60 days via FMS.
2. AP will monitor for these via query.
3. Request will be routed to the expense manager, see [example here](#).
4. Expense manager enters applicable fields (approval, pay group, combo code for reimbursement) and submits.  
**Note:** Reimbursable amount will be determined by AP.
5. Upon expense manager approval, the request routes to Payroll for reimbursement.

## BSAG Request:

Please share feedback on the process and let us know if you have questions or concerns.





## Release/Reminder Cadence:

- After each billing period ends

- Midway through each month
- Auto-reminder to each Cardholder with outstanding recon

- Midway through each month
- Auto-notification to each CBO\* for outstanding cards nearing/past 60 days

- *Further allowances made for Cardholders actively on Study Away program.*

## BSAG Request:

**We appreciate your feedback on this process.**

<i>Billing Period</i>	<i>Complete</i>	<i>Outstanding Reconciliations</i>	<i>Days since period end</i>
May 2023	94%	29	71 days
June 2023	90%	51	40 days
July 2023	22%	378	10 days

Smartsheet Dynamic View								
PCard Monthly Reconciliation Status								
Filter Off								
CH First Name	CH Last Name	Unit Name	Group Name	Year	Month Name	Submitted		
Richard	Willing	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	May	No		
Richard	Willing	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	June	No		
Scott	Almondbill	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	June	No		
Louise	Ludwin	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	July	No		
Richard	Willing	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	July	No		
Alison	Alison	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	May	Yes		
Harriet	Chen	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	May	Yes		
Louise	Ludwin	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	May	Yes		
Scott	Almondbill	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	May	Yes		
Travis	Willing	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	May	Yes		
Louise	Ludwin	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	June	Yes		
Alison	Alison	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	June	Yes		
Travis	Willing	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	June	Yes		
Harriet	Chen	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	June	Yes		
Alison	Alison	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	July	Yes		
Harriet	Chen	School of Public & International Affairs	CSISS001 - Studies General (2)	2023	July	Yes		



# Foundation Committee

*Co-Chairs: Elizabeth Prince & Sadie Brown*

---

# Human Resources Committee

*Co-Chairs: David Maddox & Chandra Echols*

---



# DOL – FLSA: Grad Assistant Compensation

## Scenario:

- To be treated as exempt, employees must earn [\\$684 per week](#) (not prorated).
- There are questions around Graduate Assistants.
- We seem to be on firm footing with GRAs, GTAs, and GLAs (see “student employees” section [here](#)).
- GAs are murkier. This is what we will discuss today.

## BSAG Request:

Open discussion and feedback.





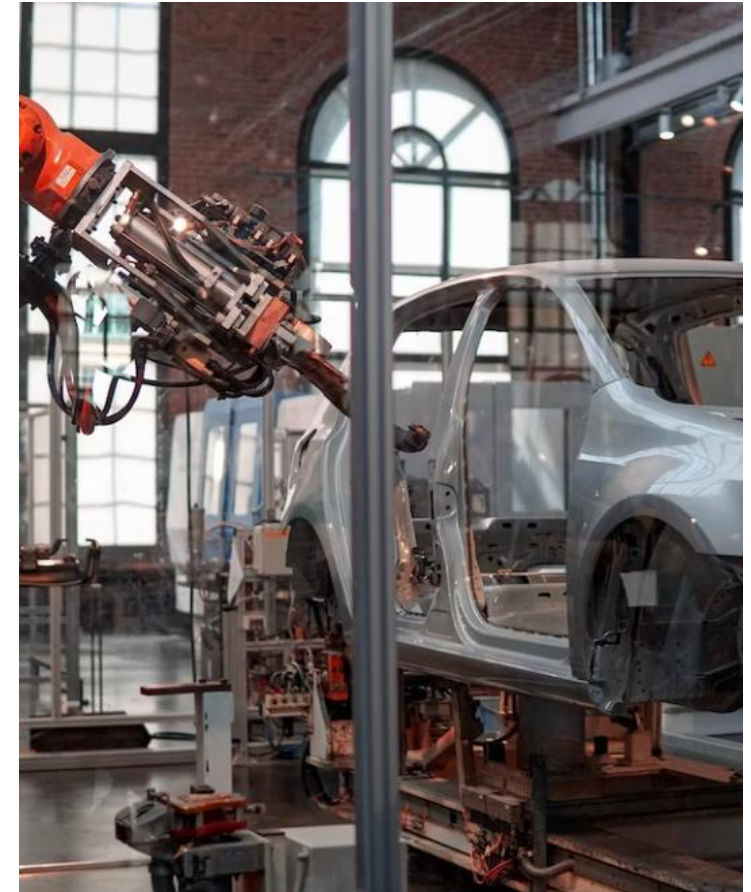
# HR Process Automation Progress

## Process Automation:

- Dynamic View Acquisition
- RSA Process Improvement
- Telework/Flextime Enhancements
- Custom User Access to Process Resources
- Dynamic View Dashboards

## BSAG Request:

Open discussion and feedback.



# Reporting Committee

*Co-Chairs: Brooke Rooks, Hailey Normandia, and Susan Cowart*

---





# Faculty Effort Reporting

## Scenario:

The reporting committee is now focused on effort reporting. A new query has been added to the System Manager WorkCenter.

**BSAG Request:**

Open discussion and feedback.

The screenshot displays the 'System Manager Reporting' interface. On the left is a navigation menu with categories like 'Queries', 'Time and Labor', 'Absence Management', 'Commitment Accounting', 'Workforce Administration', 'Manage Faculty Events', and 'Security and Workflow'. The 'View Funding Distribution' option is highlighted. The main content area shows the '180\_MFE\_FUND\_ACTIVITY - Funding Activity Percentages' query. It includes filters for 'Fiscal Year' (2024), 'Employee ID (optional)' (1803547), and 'Top HR Department'. A 'View Results' button is present. Below the filters, a table displays the results for three rows, all for employee Shelley Hooks. The table columns include Row, Name, ID, Dept ID, Descr, Position, Job Code, Descr, Program, Activity, and Percent.

Row	Name	ID	Dept ID	Descr	Position	Job Code	Descr	Program	Activity	Percent
1	Shelley Hooks	1803547	H1000395	Pharmacy-Pharm & Biomed Sci	11813668	145X00	Assoc/Asst Vice President	11100	Instruction	12.500
2	Shelley Hooks	1803547	H1000395	Pharmacy-Pharm & Biomed Sci	11813668	145X00	Assoc/Asst Vice President	12400	Research	12.500
3	Shelley Hooks	1803547	H1000395	Pharmacy-Pharm & Biomed Sci	11813668	145X00	Assoc/Asst Vice President	14600	Administrative	75.000



# Add Class Code to BSR Lite?

## Scenario:

The Reporting Liaisons team suggested adding Class Code to the [BSR Lite](#).

Does BSAG agree? Other thoughts?

**BSAG Request:**

Open discussion and feedback

The screenshot displays the BSR Lite interface. At the top, there are tabs for 'BSR Lite', 'Transaction List', and 'Payroll List'. Below these, the 'BSR Lite' section shows filters for Department (61065000 - Finance Division Programs), Fiscal Year (2024), Fund Descr ((All)), and Bud Ref (2024). An information icon is visible on the right. The main section is titled 'Accounts Summary' and contains a table with columns: Bud Ref, Fund Descr, Chartfield1, Account Level 2, Budget, Encumbrance, Actuals, and Balance. The table data is as follows:

Bud Ref	Fund Descr	Chartfield1	Account Level 2	Budget	Encumbrance	Actuals	Balance
2024	10000 - RI-State Appropriations	#NA	500000 - Personal Services Expense	\$490,258.01	\$448,215.57	\$35,636.99	\$6,405.45
			700000 - Op Supplies & Expenses	\$5,000.00	\$0.00	\$0.00	\$5,000.00
		Total		\$495,258.01	\$448,215.57	\$35,636.99	\$11,405.45
Grand Total				\$495,258.01	\$448,215.57	\$35,636.99	\$11,405.45

Below the table is a 'Transactions' section with a link 'Go to Full Transaction List'. It shows a table with columns: Date, Vendor Name, Document ID, Document Descr, Budget, Encumbrance, and Actuals. The first row of data is:

Date	Vendor Name	Document ID	Document Descr	Budget	Encumbrance	Actuals
8/4/2023	#NA	BSNCR11654	BSN - Payroll Processing - Encumbrance Projection	\$0.00	\$448,215.57	\$0.00



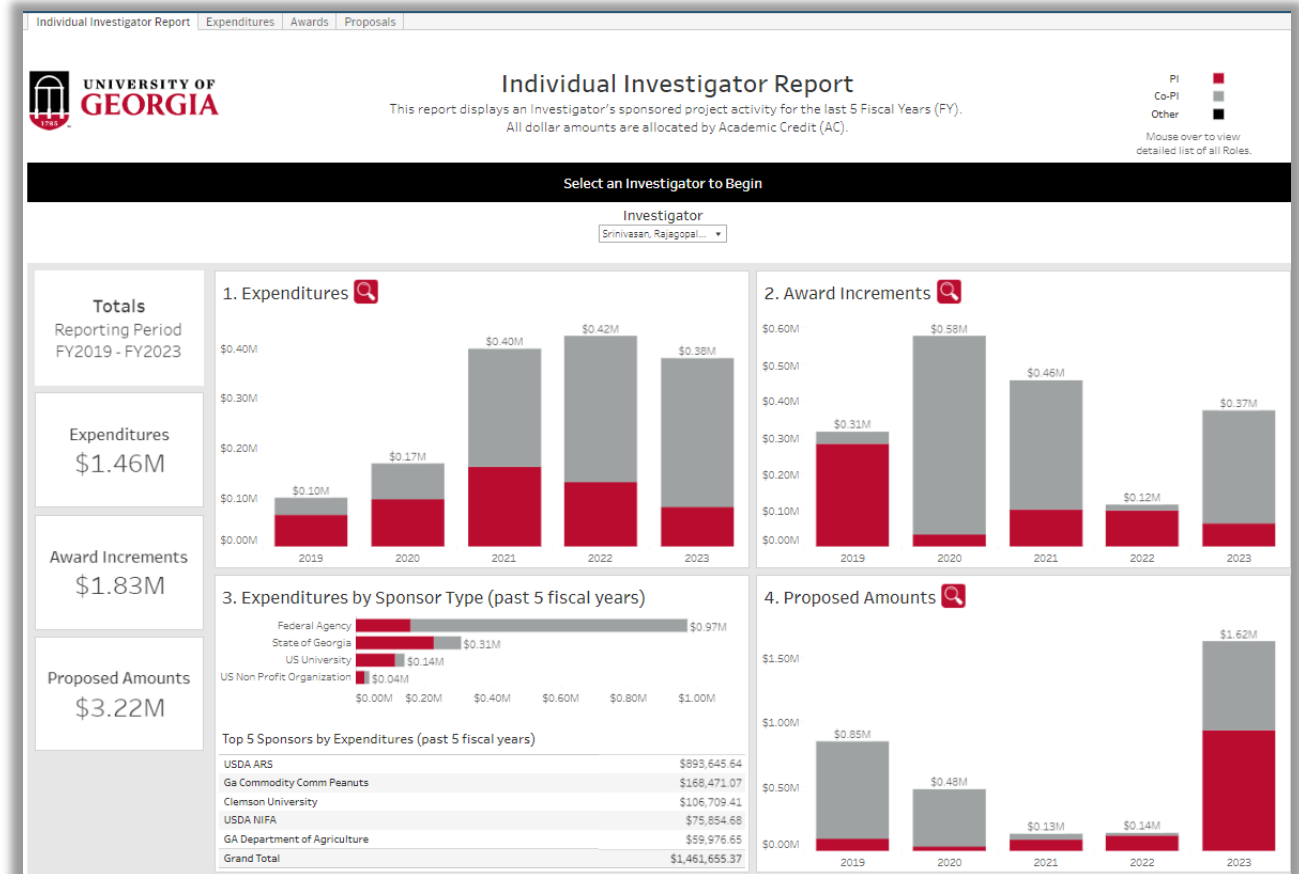
# Individual Investigator Report

## Scenario:

- Draft [Individual Investigator Report](#) now available for your review.
- Planning to release in August.

## BSAG Request:

Open discussion and feedback.



# Other Business

---



# BSAG Co-Chairs: Proposed BSAG format and meeting frequency change

- Proposal to move to quarterly meetings.
- **Goal:** Identify the top priority items in each area so that we can put focused effort into addressing specific opportunities for improvement.
- Create an initial short list. Collect feedback not just from BSAG meetings but the larger community. Prioritize and act.







# Meeting Location Request

## Scenario:

Does your unit have space that could be used for future BSAG, HR Liaisons, or CBO meetings?

Our team is increasingly needing spaces to hold meetings such as this one.

Great exposure for your college/unit

Furtheres our mission to be collaborative

## BSAG Request:

Please send contact info of team/individual who manages these spaces to

[OneSourceComm@uga.edu](mailto:OneSourceComm@uga.edu)

# Open Discussion

---

**Next meeting:**  
TBD...based on  
discussion today!

View past meeting  
materials on  
the [BSAG website](#)

