

## Meeting Minutes: Business Services Advisory Group

Date and time: Wednesday, March 23, 2016 from 3:00 – 4:30 p.m.

Location: MLC, Room 0148

### I. Welcome and Announcements

- A. Sarah Fraker welcomed the group and covered the agenda for the meeting. A temporary Co-Chair for the Property Control Committee was requested. Penny Benton volunteered to serve in this temporary role.

Also, a new BSAG Co-Chair was requested to replace Sarah Fraker as she takes on a new role with the OneSource project. BSAG members are encouraged to e-mail Sarah ([fraker@uga.edu](mailto:fraker@uga.edu)) with any nominations they may have for this role. Holley Schramski wanted those interested to keep in mind that this is a time commitment and that anyone nominated should discuss that time commitment with their manager.

### II. Project Updates and Committee Reports

#### A. **Item 1.2 – Simpler Demonstration – Susan Cowart, Lauren Holcomb and Brett Jackson**

- i. Brett Jackson provided an update on where UGA is on the Simpler implementation thus far. The homepage has had some changes to be more user friendly and included a demonstration on how users can customize shortcuts.
- ii. Various options were presented (liability accounts, year-to-date budget balances, vendor reports, chart of accounts, object codes, etc.) to show specific types of data.
- iii. Access to Simpler can be requested by going to the Simpler website (<http://simpler.uga.edu>) and clicking on the request access link on the homepage. Training materials and quick reference materials are also available within Simpler. These materials will aid in setting-up filters and performing smart searches. Holley Schramski requested that everyone begin to use Simpler and provide feedback.

#### B. **Item 16 – Travel Expense Statement – Andre Simmons**

- i. Andre requested feedback on the new travel expense statement form that was sent out to BSAG for review. After determining that the form may only be used for two years before the People Soft implementation, the length of the form itself and the mixed results from departments, a vote was taken to table this item.

#### C. **Item 27.1 – Salary Scale for Staff – Juan Jarrett**

- i. Juan Jarrett expressed that we're in a current "gray area" due to the pending FLSA rule. The Department of Labor rule will provide, soon hopefully, more clarity for a UGA salary study.
- ii. A query of campus will be done before creating the RFP and the goal is to present the RFP and next steps to senior administration later this calendar year.

#### D. **Item 46 – Indirect Cost Distribution – Chad Cleveland**

- i. Chad Cleveland presented the indirect cost distribution return process. The attached document was provided ([Click here](#)). The group voted to close this item and Chad will send the document along with this year's IDC distribution. Anyone with questions can contact Chad Cleveland at [cleveland@uga.edu](mailto:cleveland@uga.edu).

**E. Items 20 & 40 – ACA Tracking – Lynn Burt and Amy Thomas**

- i. HR will work to provide an FAQ document on the HR website. It was voted to close this item since communication will be provided shortly.
- ii. Item 40 was also voted to be closed after a memo will be drafted explaining why UGA cannot allow “any Georgia student (USG, TSG and private) to work 1300 hours in a year without having to take a 26 week break due to ACA”.

**F. Item 31 – Onboarding Training Modules – Lynn Burt and Amy Thomas**

- i. The modules within the Onboarding system are UGA specific, not department specific and existing “modules” are simply links, and not the training themselves. After some discussion about having to manually add users to the eLC system for required training, like Ethics, HR requested that this particular training cannot be added to the Onboarding system. Juan Jarrett added that sexual harassment training would also be coming, so it’s a possibility that this could be added to the Onboarding system in the future.

**G. Item 89 – Update changes needed in the E-leave system – Lynn Burt and Amy Thomas**

- i. It was decided to table this item due to the fact that an internal audit is still being conducted. Any recommendations from this audit will be helpful in making changes and determining process for the People Soft implementation.

**H. Item 125 – Salary Action Forms to Budgets – Lynn Burt and Amy Thomas**

- i. More information was requested on this item. It was suggested that HR follow the same communication process as was put in place with Supplements. Lynn indicated that HR is willing to send along a copy of other types of Salary Actions directly to the Budget Office at the same time as it returns an approved form to a department. It was voted to take that approach and close this item. An announcement will be sent to the Business Services listserv the first week in May.

**I. Item 9.1 – DocuSign – Gwen Moss and Sean Rogers**

- i. Members of the pilot project group provided an overview of their report on the DocuSign beta testing. ([Click here](#)). Feedback was provided to Holley Schramski, who indicated that due to the overwhelming interest and success of the bets, UGA will be moving forward with adoption of this product and communication with EITS has already been started. A systematic approach with the campus community will be done to implement DocuSign. Per the group’s findings, training will be especially important for those who are initiators in the system.

**III. Other Business**

- i. Chad Cox presented information on UGA mart Access ([Click here](#)). Various options were presented to BSAG for feedback: 1. Give all users (anyone with a MyID) “View All” access, 2. Give all roles above the default Shopper role “View All” access or 3. Keep access the way it is. It was voted to give all roles above the default Shopper role “View All” access. Notification of this change will be sent to the impacted UGA mart users and to the Business Serv-L ([click here](#)).
- ii. Andre Simmons updated BSAG on the direct billing option for hotel stays when traveling. Accounts Payable is seeking information from departments on their level of interest in this option.

- iii. Andre Simmons updated BSAG on the option to view all travel authorities initiated in the department regardless of who submitted it. This is being pursued and Accounts Payable anticipates the functionality being available prior to fiscal year end. An announcement will be issued to BSAG and the Business Serv-L upon project completion.
- iv. Sarah Fraker announced that staff from Development and Alumni Relations will be demonstrating the new Foundation online check request system at the May BSAG meeting.

As there was no further business, the meeting was adjourned.