

# BSAG Minutes

Wednesday, August 10, 2022

3:00 – 4:30 p.m.

Location: Botanical Garden Terrace Room (welcome back to in-person!)

Attendance: 100+

Action Items: In Green

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## I. Welcome and Thank You Remarks: Shawn Hill and Jared Peden

- I. Discussion of BSAG purpose and format moving forward.
- II. Thank you to prior BSAG committee co-chairs!

Thank you, outgoing BSAG Co-Chairs!

June 2019 – 60 completed process improvements

Aug 2022 – 386 completed process improvements

## II. Committee Reports

- **Faculty Affairs Committee:** Carly Surratt; Mike Gorman
  - Please welcome Mike as the new Faculty Affairs co-chair!
  - Question (Sarah Fraker): looking for a query that includes faculty rank and not only job title. Is something available that would allow units to confirm faculty rank? **Action (Carly):** reports are available; Carly will share with the group, but may not be exactly what is needed.
  - Question (Anne Marie Cunningham): is there any training for new faculty affairs liaisons? Carly: no, that is really unit-specific. Working on building some generic training. Contact Carly or Amy Wright for one-on-one training.
- **Finance Committee:** Kathy McCarty; Shelly Terrazas
  - Please welcome Kathy and Shelly as the new Finance Co-Chairs!
  - **ClinCard Pilot:** Kim Seabolt, Jill Tincher
    - Looking for volunteers to pilot this program.
    - Q (Sarah Fraker): What steps are needed to charge/fund the accounts in ClinCard? Kim: essentially, chartstring is provided and it funds the ClinCard account. No integration with UGA Financial Mgmt.
    - Q (Sean Rogers): Assume there are no compliance issues with the way these are funded against a grant? Jill: the value and all the costs of the

study, the institution bore the full cost of the research and then the sponsor refunded the university at University of Miami.

- Q (Andy Garber): What approval workflow does setting up an account route through given it will charge an account? Jill: In the system, it allows owners to setup workflow and determine security roles as to who can set up and who can approve etc. Kim: we'll work with depts to establish a process as it goes.
- Q (Andy Garber): Can we blind participant info ... use participant # in system instead of names? Jill: you can limit who has access to pt. information. Once a participant is set up in system, others can only see a fraction of their PII.
- **Action (BSAG):** If you are interested in piloting the ClinCard program, please contact Kim Seabolt.

- **Procurement Updates:** Bob Currey

- Department restructured to reallocate and better distribute work volume
- *New Procurement Point of Contact* – will be distributed soon. **Action (Bob):** Distribute procurement points of contact.
- Developing new training offerings and hope to have the schedule for those available soon **Action (Bob):** Distribute schedule of training offerings.
- Q (Sean Rogers): would procurement be willing to travel to other UGA campuses? Bob: yes, we would.
- Q (Sadie Brown): could you investigate the PO close process? Process is currently requiring multiple follow-ups from units. Bob: thank you for this feedback; the PO soft close process which requires 60 days is something we need to evaluate. **Action (Bob):** Evaluate PO soft close process.
- Q (Blake Waldrop): looking for additional reporting for existing POs. Bob: procurement is working on developing new reporting which they currently intend to distribute to units quarterly. **Action (Bob):** Keep group apprised on progress of quarterly reports.

- **Foundation Committee:** Elizabeth Prince; Sadie Brown

- *Combining FAME and Financial Mgmt data* – prototype is complete and working with OIR to get combined reporting on FAME and FMS data via the data warehouse.
- *Scholarship survey* – Foundation joint effort with Financial Aid and DAR. Intended to gather a variety of feedback on the multiple systems. Survey should be distributed within the next couple of weeks. **Action (BSAG):** When the survey is distributed, ensure that any applicable faculty/staff in your unit receive this. Complete the survey yourselves with the “CBO response” option.

- **Human Resources Committee:** Tammy Freeman

- Working to identify the HR co-chair; should have an update by October.
- Teaser: Working on a new process for RSAs and supplement processes; more on that soon.
- Q (Blake W): Given current processing times, are we steadfast on our practice of not backdating? Tammy: Yes, for now, but if delays are caused by HR and there are exceptional circumstances, we can consider case by case.

- **Reporting Committee:** Laurel Palmer; Hailey Normandia
  - **NEW:** MCOP dashboard (Operational Reports > [HCM/Personnel](#) > Position Funding – Payroll > Multiple Components of Pay)
    - [MCOP Dashboard](#)
    - This is a solution for research administration staff to view base salaries across departments for proposal building. **Action (BSAG):** Please review this report and let OIR know if changes are needed.
  - **NEW:** HR dashboards (Operational Reports > [HCM/Personnel](#) > KPIs)
    - [Off Cycle Payroll Analysis Dashboard](#) (David Maddox presenter)
    - [OneUSG Connect Transaction Metrics](#) (David Maddox presenter)
    - **Action (OneSource Communications):** Coordinate a segment on the status call covering how to request access and view security roles across various systems.

### III. Other Business

- **Audit Checklist:** Brooke Rooks – adding audit checklist to the best practices library. Goal is to build out content for 24 areas for auditing best practices to add to the library. Will roll out in phases and you may be hearing from us individually. More soon!
- **Training Library Conversion and Reorganization:** Ben Nunley – introduction of proposed organization of the training library when we transition from UPK to TeamDynamix. New top-level categories are designed to be more intuitive for the casual user (e.g., not organized by module). **Action (BSAG):** Please review the [new categories](#) and, if you'd like to see changes, provide feedback by Fri, Aug 19.
- **Job Earnings Distribution:** Chad Cleveland – discussed MCOP and Job Earnings Distribution (JED). The system office expects both to be established and we need to identify a process to make this happen in a way that is not too onerous to manage. Chad shared [this analysis](#) of the affected population. It is unlikely that this can be achieved through BPSS.
  - Comments – moving to JED & MCOP requires significant additional work by financial office of units in early July each year, especially the funding on the non-regular earnings and setting up the budget.
  - More conversation on this topic will be needed to identify a solution that is workable for all. Today's comments were for awareness.