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
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.
P-Card Monthly Reconciliation

Release/Reminder Cadence:

- **Notification to Submit**
  - After each billing period ends

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

- **60-day 'Critical' Reminder**
  - Midway through each month
  - Auto-notification to each CBO* for outstanding cards nearing/past 60 days

- **60+ day card deactivation**
  - Further allowances made for Cardholders actively on Study Away program.

* CBOs also have access to the PCard Monthly Reconciliation Status report, providing real-time of users' recon submission status. CBOs can grant designees access to this data using the Procurement Smartsheet Reporting Access tool.

**Results to Date (as of 8/7/23)**

<table>
<thead>
<tr>
<th>Billing Period</th>
<th>Complete</th>
<th>Outstanding Reconciliations</th>
<th>Days since period end</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 2023</td>
<td>94%</td>
<td>29</td>
<td>71 days</td>
</tr>
<tr>
<td>June 2023</td>
<td>90%</td>
<td>51</td>
<td>40 days</td>
</tr>
<tr>
<td>July 2023</td>
<td>22%</td>
<td>378</td>
<td>10 days</td>
</tr>
</tbody>
</table>

**BSAG Request:**

We appreciate your feedback on this process.
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.
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
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
Furthers our mission to be collaborative

**BSAG Request:**

Please send contact info of team/individual who manages these spaces to OneSourceComm@uga.edu
Open Discussion
Next meeting:
TBD…based on discussion today!

View past meeting materials on the BSAG website