



CHSS Info Session

SPRING 2019

February 14, 2019



Agenda

10:30 am – 10:50am **Introductions/Ice Breaker**

10:50 am - noon **Finance Team Presentation and Q & A**

noon - 1:00 pm **Lunch**



2018-19 CHSS Priorities

- Develop a multi-year budget planning process
- Build CHSS brand and enhance PR for CHSS faculty, students and alumni achievements and career pathways
- Strengthen infrastructure for research and graduate education
- Support strategic curricular innovation and entrepreneurial partnerships
- Begin to address longstanding faculty and staff compensation issues

FY20 Budget and Planning Timeline

Date	Activity
Late January	Planning Templates sent
February 22	Planning Templates due <ul style="list-style-type: none">• FY20-22 planning tab completed• FY20 budget request tab completed• 1 page summary of planning and requests• 1 page supplemental information on TT requests
Feb 25 – Mar 8	Department/Program meetings for each Chair and Director to present planning and budget requests
March 20	Revised 1 page supplemental information on TT requests due/provided to Senior Leadership
Week of March 25	Senior Leadership meeting – will advise senior staff on TT requests
April 1-15	Senior Staff review all budget requests
By April 30	Budget decisions communicated to Chairs and Directors

Graduate Support

FY20 funding increased to cover 4 years of support for graduate students ~ \$2M

FY20 Support Summary

- \$3.9M stipend
- \$3.0M tuition waiver
- \$300K MA OOS discounting

Compensation

Phase 1 of a multi-year strategy to address compensation - \$851K in salary (full cost) increases

- Faculty Merit/Equity - \$525K
- Faculty Minimums - \$168K

Rank	9 month	12 month
Term Instructor	\$45,000	\$55,000
Term Asst Prof	\$50,000	\$61,111

- Classified/Admin Fac - \$158K

Compensation – next steps

- University raise – planned for June, 2%
- Increase to University Faculty minimums – effective August 2019
- Summer 2019 – work on EWPs in preparation for phase 2
- Fall 2019 – phase 2 of college supported increases for faculty and staff

FY20 Budget Outlook

- Modest growth in FY19 enrollment should result in 1-2% increase in permanent budget

Spring Calendar

<ul style="list-style-type: none">• Depts. submit Dept Funding Change Forms for Spring grant effort (cont.)• First pay check for Adjuncts (Feb 15th)• Last day for students to enroll in Student Health Insurance (Feb 15th)• BTS (Budget Tracking System) open for departments to enter FY20 Teaching Load (Feb 11 – Feb 25)• GL (Graduate Lecturer) budget transferred from PT (Part-time) to GA (Graduate Assistant) accounts within departments• PT budget analysis and adjustments completed• Fiscal Year end AP (Accounts Payable) deadlines published (contact Dean's office if copy needed)	FEB
<ul style="list-style-type: none">• Department/Program budget meetings• Spring tuition waivers reconciled• Term Faculty Reappointment Contract deadline (March 15)• BTS opens for Summer School 2019	MAR
<ul style="list-style-type: none">• Academic year 2020 tuition rates established by BOV (Board of Visitors)• BTS opens for Fall 2019 GA and PT assignments	MAY
<ul style="list-style-type: none">• Fall Health Insurance eligible students list due to Provost's Office – students begin enrolling for Fall 2019	JUL



Updates & Reminders

- End of FY (Fiscal Year) labor reallocation deadlines
- Banner/Finance Liaison – forms requiring signature
- Termination of GA/PT/GL assignments - only ez-EPAF!



Save the Date

Reconciler's Discussion Group – February 26, 1-2pm & March 26, 1-2pm (typically last Tuesday of the month)

Introduction to International Tax – March 4, 1-3pm

Spring Upload - Recap

- 400 assignments successfully uploaded.
- Spring contract submission close to perfect!
- CHSS had the only Spring upload file that was error free.

- THANK YOU, THANK YOU, and THANK YOU, great job!

Touchnet MarketPlace - Update

- Successfully added 2 new uStores, 1 new product, and miscellaneous changes to live stores.
- Key to success, is planning and giving sufficient time with requests. Please plan accordingly.
- Link to view Mason MarketPlace Live stores/application process.
 - <https://fiscal.gmu.edu/mason-marketplace/>

Graduate Student Hiring Rules & Procedures

- Students must be in good academic standing, maintain a minimum 3.0 GPA, and not receive any unsatisfactory grades for each semester they are to hold an assistantship or lectureship.
- Unsatisfactory Grade: A course grade of “C” or below, or a course grade of “Incomplete” (IN).

International Teaching Assistants

- Applies to Graduate Assistants that required assessment for English Proficiency for Admissions into GMU.
- INTO Mason's Learning Resource Center (LRC) will administer assessment.
- Ideally the test should be taken at least 6-8 weeks prior to prospective appointment.
- Information session for department representatives to be held on 3/28/19 regarding English Language testing and tutoring for International Graduate Teaching Assistants and Graduate Lecturers.
- LRC Coordinator – Kathy Rossell krossell@gmu.edu
- Detailed information provided on handouts.



EZ-EPAF

- Banner is always the official record of employment.
- Banner access change. CHSS staff no longer have access to submit EPAF's in Banner.
- Procedure for hiring new employees.
- All terminations must be submitted through Ez-EPAF.



Food & Beverage

- New Food & Beverage Authorization form available on the Fiscal Services website.
 - ❖ Fillable form is now used for Food & Beverage authorization only, Pcard lifts and Request for reimbursement.
 - ❖ Form contains active links to form completion instructions, payment guides and Event quick guides.

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Graduate Fellowships – Qualifying Awards

- External funding fellowship awards and approved internal fellowships made to Mason graduate students may be deemed “qualifying awards” allowing the recipient of the award eligible for in-state tuition rates and subsidized health insurance
- University Policies 6001 and 6003
- In addition to the fellowship payment, student receives a 0.25 FTE (5 hrs/week) assignment for the AY with a stipend of \$4,000

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Research Policy Updates

- Planning 9-month faculty Summer Research
 - <https://universitypolicy.gmu.edu/policies/research-extended-appointment-policy/>
 - Summer Salary:
 - no more than 90% of summer effort (2.7 months) can be charged to externally sponsored projects during the summer
 - applies to 9 month appointments and 12 month extended research appointments

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OSP/Fiscal Service updates

Human Subjects Payments using Pcard

- All IRB protocols for payments to human subjects applies
- All cards must be used/reconciled fully within 60 days
- CHSS will have a centralized process, all requests submitted to Janice/Olga via email
 - # of cards, denomination, type of card
 - Date(s) study will be conducted and cards used
 - Fund/Org to charge the expense
 - PI and Custodian name (may or may not be same person)
 - IRB protocol number

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OSP Reconciliation Reports Update

PI Dashboard Report Changes:

1. Better displays
2. Added indirect rate
3. Total number of hours worked for wage employees

Reconciliation
Fund 221895

Fund 221895
by Month Range

George Mason University

Division:	Nutrition and Food Studies	PI:	Doe, John
Dept/Program:	College of Health & Human Services	Run Date:	01/31/2019
Reconcile Start Month:	Aug-2018	Department:	Department of Nutrition
Reconcile End Month:	Oct-2018	F&A Rate:	
Fund:	223xxx	Project Title:	PHF/Child Year 2
Grant:	223xxx	Agency:	Potomac Health Foundation (PHF)
Grant Start Date:	7/1/2018	Grant End Date:	6/30/2019

Pooled Budget Level	Pooled Budget Desc	Funded Amount Thru End Month	Expenses Between Start and End Month	Expenses Thru End Month	Commitments Thru End Month	Available Amt	Adjustments	Notes
61100	Faculty Salaries	35,739.00	3,851.54	3,851.54	19,257.75	12,629.71		
61130	Faculty Special Payments	4,795.00	2,795.00	2,795.00	0.00	2,000.00		
61200	Administrative Salaries	0.00	2,976.41	2,976.41	7,937.08	(10,913.49)		
61300	Classified Salaries	0.00	1,600.00	1,600.00	0.00	(1,600.00)		
61400	Wages	47,980.00	7,462.50	7,462.50	0.00	40,517.50		
61900	Fringe Benefits	16,202.00	3,882.24	3,882.24	9,681.36	2,638.40		
73400	Consulting Services	2,000.00	0.00	0.00	0.00	2,000.00		
73800	Travel	1,000.00	0.00	0.00	0.00	1,000.00		
70000	Other Direct Expenditures	14,660.00	3,975.29	3,975.29	0.00	10,684.71		
78500	Tuition and Stipend	4,800.00	0.00	0.00	0.00	4,800.00		
Direct Total		127,176.00	26,542.98	26,542.98	36,876.19	63,756.83		
		127,176.00	26,542.98	26,542.98	36,876.19	63,756.83		



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BTS Enhancements and Reminders

New BTS Funding Change Forms Functions

1. Status dates can now be viewed under “My Funding Changes” tab in the “status” column by hovering over each individual status.

NAME	G#	FUND/ORG	ACTIVITY	%	AMOUNT	START	END	STATUS	BTS ID	BANNER IDS	ACTIONS
Chowdhury, Sharmistha Info	G00850671	223005 Anne D. Casey Foundatio		80%	\$10920.99						View
		223105 Implementing the Level c		20%	\$2730.25	09/25/2017	12/24/2017	ABCD	BTS 15	1236796 / 1236797	Show PDF Upload PDF

2. The newly created “show authorized orgs” button allows users to pull funding change forms related to any organization they are authorized/have access to see.

New Funding Change **My Funding Changes** Finance

Selection — Use the fields below in combination with each other to find your records

Fiscal Year: Status: Approved in Banner (D) As Of: Funding:

Employee: Position: (Partial allowed 'GA') Funding Dates: From: To:

Fund/Org #: (Labor Distribution) Last Name: (Partial allowed 'Smi')

G#: Submitter: Include ALL funds/orgs I'm authorized for

[Find Funding Changes that Match Selection Criteria](#) [Reset](#)

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BTS Funding Change Forms (FCFs) continued...

CHECK and VERIFY the following:

- ✓ Annual Salary Information in Banner
- ✓ FCF start and end dates especially after making adjustments in “My Funding Changes” tab
- ✓ Total percentage of labor distribution
- ✓ FCF status (submitted in status “B” and approved in status “D”)
- ✓ BTS generated emails – FCF returned for correction or FCF record approved by CHSS Finance Office

Human Resources

Dynamic Forms (electronic transaction forms)

- Faculty Transaction Form
- Faculty Separation Form
- Classified Separation Form

Unit Approver: Joan Mlotkowski, Jmlotkow@gmu.edu

Executive Level: Provost

Unit: College of Humanities and Social Sciences

NEW CHANGE: FTF for faculty leave now only requires one form – no need to submit a return from leave FTF.

Human Resources

Term Faculty Contracts

- Term Faculty Single-Year Reappointment Contracts due: March 15 (reminder: do not indicate teaching load)
- Term Multi-Year Appointment Contract Packets for spring cycle due: March 15

Human Resources

Faculty Separations

- Submit Faculty Separation Form as soon as you learn a faculty member is resigning/retiring.
 - Employee Separation Checklist – keep on file
 - Property Clearance Checklist – keep on file

Human Resources

Question: How to process I-9 for remote workers?

Answer: - Process new hire through MasonOnBoard.

- Complete Remote Hire Notice Form and send to HR.

- Contact HR with required information (per handout).

- Complete a Remote Work Agreement and send to HR.

CHSS Finance & HR contacts

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Thank you for coming!



Please remember to turn in your
evaluation.