CHSS Info Session

SPRING 2019

February 14, 2019
Agenda

10:30 am – 10:50 am  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

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
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</thead>
<tbody>
<tr>
<td>Late January</td>
<td>Planning Templates sent</td>
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</table>
| February 22        | Planning Templates due  
• 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
- Classified/Admin Fac - $158K

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<tr>
<th>Rank</th>
<th>9 month</th>
<th>12 month</th>
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<tr>
<td>Term Instructor</td>
<td>$45,000</td>
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<tr>
<td>Term Asst Prof</td>
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<td>$61,111</td>
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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

- **FEB**
  - 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)

- **MAR**
  - Department/Program budget meetings
  - Spring tuition waivers reconciled
  - Term Faculty Reappointment Contract deadline (March 15)
  - BTS opens for Summer School 2019

- **MAY**
  - Academic year 2020 tuition rates established by BOV (Board of Visitors)
  - BTS opens for Fall 2019 GA and PT assignments

- **JUL**
  - Fall Health Insurance eligible students list due to Provost’s Office – students begin enrolling for Fall 2019
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.
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/](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
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
Sponsored Research

OSP Reconciliation Reports Update

PI Dashboard Report Changes:
1. Better displays
2. Added indirect rate
3. Total number of hours worked for wage employees

<table>
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<tr>
<th>George Mason University</th>
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<tbody>
<tr>
<td>Division: Nutrition and Food Studies</td>
<td>PI: Doe, John</td>
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<tr>
<td>Dept/Program: College of Health &amp; Human Services</td>
<td>Run Date: 01/31/2019</td>
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<td>Reconcile Start Month: Aug-2018</td>
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<td>Reconcile End Month: Oct-2018</td>
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<td>Grant: 223xxx</td>
<td>Agency: Potomac Health Foundation (PHF)</td>
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<td>Grant Start Date: 7/1/2018</td>
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<th>Pooled Budget Level</th>
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<th>Funded Amount Thru End Month</th>
<th>Expenses Between Start and End Month</th>
<th>Expenses Thru End Month</th>
<th>Commitments Thru End Month</th>
<th>Available Amt</th>
<th>Adjustments</th>
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Direct Total: 127,176.00

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<th>Funded Amount Thru End Month</th>
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<td>127,176.00</td>
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<td>26,542.98</td>
<td>36,876.19</td>
<td>63,756.83</td>
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Sponsored Research

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.

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.
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
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

Kimberly Dight; Executive Director: kdight@gmu.edu (ext. 39637)
Irene Mills; Associate Director, Budget: imills2@gmu.edu (ext. 38862)
Sarah Fink-Youngbar; Budget Analyst: sfinkyou@gmu.edu (ext. 38733)
Shirley Steppe; Fiscal Technician: ssteppe2@gmu.edu (ext. 35457)
Janice Cohen; Associate Director, Post Award: jcohen9@gmu.edu (ext. 38612)
Olga Shchepina; Budget Analyst- Grants: oshchepi@gmu.edu (ext. 38635)
Joan Mlotkowski; Human Resources Coord.; jmlotkow@gmu.edu (ext. 38786)
Thank you for coming!

Please remember to turn in your evaluation.