



CHSS Info Session

FALL 2018

September 18, 2018



Agenda

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

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

noon - 1:00 pm **Lunch**



Budget Outlook

- CHSS experienced enrollment growth in FY18; the college anticipates receiving additional budget resources as a result
- Dean Ardis has identified compensation and graduate support as the areas of greatest need
 - working with HR and the Provost's Office on a compensation study for faculty and staff
 - reviewing graduate support scenarios to forecast additional expense

Budget Planning

- Dean Ardis has set a vision for multi-year, all fund planning across the college which encourages cross-departmental collaboration
- Chairs and Directors, and Office Managers were briefed on Mason's recently adopted incentive-based budget model (E&G)
- Meetings will be scheduled with each department/program to review department budget model detail. These meetings will replace Fall budget review meetings; reports will be sent. Research center meetings will take place; others may be requested.
- Developing planning template for FY20 resource allocation planning

Save the Date

September 24 – Budget Town Hall, 1-2:30

October 15 – Fiscal Topics, 11-12

December 5 – Mary Roper Award 10-11:30

Fall Calendar

<ul style="list-style-type: none"> FY19 Budget Transfers done end of July including revenue carryover 	JUL
<ul style="list-style-type: none"> Formal performance evaluation meetings (Aug – Oct) 	AUG
<ul style="list-style-type: none"> Last day to add classes (Sept 4) Last day to drop classes with no penalty – full refund (Sept 10 deadline) Drop classes with no refund – 100% penalty (Sept 11 and later) First pay check for GAs & Adjuncts (Sept 14) Last day to enroll in Student Health Insurance (Sept 15) GL funds transferred from PT to GA accounts within departments 	SEP
<ul style="list-style-type: none"> Fall tuition waivers reconciled (Mid- Oct) Department/Program budget reports sent – meetings for Centers, others if requested (Oct/Nov) 	OCT
<ul style="list-style-type: none"> BTS opens for Spring 2019 GA, PT and GL assignments 	NOV
<ul style="list-style-type: none"> Spring Health Insurance eligible students identified in BTS and coded in Banner (only for newly admitted students) Term Faculty Non-reappointment Notification Letters (Dec 14) 	DEC



Updates & Reminders

- Federal Work Study Budget– FY19
- EPAFs – Provost funded assignments charged outside CHSS: no need to get approvals from Provost office. Examples, 4VA, SIG & CIG awards, other Provost.

Upload/Waivers – Updates/Reminders

- Great job on another successful upload.
 - Place holders become assignments once uploaded.
 - To cancel assignments that was included in upload - EzEPAF must be done.
 - Faculty Overloads not allowed in upload any longer.
- Waiver
 - Not as restrictive.
 - GL's still not allowed to be given waivers.
 - If in doubt or have a special situation, please e-mail request.
 - No additional waiver pool available.

Subsidized Graduate Health Insurance (SGHI)

- Communicate any changes in students eligibility ASAP by e-mail.
- Students who lose eligibility prior to 9/15, tuition rates revert to out-of-state (if applicable) and the subsidy canceled.
- Students who lose eligibility after 9/15, retain in-state tuition rates (if applicable) and the subsidy coverage for the remainder of the fall coverage period (1/4/19).
- Provost Office to continue to cover first 3 years of coverage and CHSS to cover 4th and 5th year coverage (for FY19). Departments responsible for anything after 5th year.
- GA's need to meet eligibility by 8/29!

New Adjunct Faculty Success Workshops

- Offered in August and January for all new Adjuncts and GL's.
- Extensive information and useful handouts distributed.
- Breakout sessions in afternoon for greater learning ability.
- Office Manager/Department Representative also welcome.

Adjunct Management Workflow

- Work group to create a system to help Colleges with uploads.
- BTS will continue to be used for CHSS until further notice.
- New system does have promise and CHSS has suggested some features, but it is not a finished produce.

Touchnet MarketPlace

- CHSS has added several stores over the last 12 months.
- Touchnet Coordinator to help build your store.
- If interested, please plan accordingly.



Dean's Start-up Policy

- Changes to Start-up: The new policy allows a little more flexibility.
- Purchases made with the department Pcard and through eVA would be charged to the department Org. and then a JV submitted to CHSS Finance for approval and processing.
- Travel costs would be handled through the TRS system, just as they are now.



EZ-EPAF

- SPAIDEN records must be complete for Banner to accept EPAF
- **Please** check Pooled Positions for position numbers prior to submitting Ez-EPAF's. If none exists, please do the following:
 - ❖ For Orgs. [1xxxxxx]- Contact HRoffice@gmu.edu. Provide Org. number, position type needed and Point of Contact.
 - ❖ For Grants [2xxxxxx] – Contact OSP- Michael Washburn. Provide the position type, PI name and request the **base date of the position** be set to the funding start date.
- When submitting Ez-EPAF's for wage, student wage or federal work study positions; please refer to the EPAF Field Requirements manual, Bi-Weekly Assignments guide on page 8 for hours per week, hours per pay period.

<http://hr.gmu.edu/hrliaisons/docs/EPAFFieldRequirements.pdf>



Travel

- All Travel authorizations and reimbursements must go through the TRS system. Travel will not accept hard copy reimbursements.
- **Reimbursements for travel need to be submitted within 60 days of the end date of travel. Anything later runs the risk of being processed as taxable income.**



New International Travel process

- OSP has been added as an approver in the TRS system for International travel on federally sponsored projects (20xxxx).
 - ❖ Travel Authorization- Workflow will send the traveler/delegate an email with the Fly America document attached for reference when booking airfare
 - ❖ Travel Reimbursement approval- Workflow will make OSP the first approver to review the document. .

Sponsored Research

New FY Fringe Rates and F&A Rates

Fiscal Year 2018-2019

Fringe Benefit Rates

- Instructional and Research Faculty — 35.6%
- Administrative Faculty — 35.6%
- Classified Staff — 45.8%
- Adjuncts, Special Pay, Summer Faculty, and Wages — 7.3%
- GTAs and GRAs — 0%

FY19 and FY20 Rates are as follows:

On-campus research 57.0%

Off-campus research adjacent 27.7%

Off-campus research remote 26%

Sponsored Research

Research Policy Updates

- Conflict of Interest changes
 - required for all benefitted employees
- Research Extended Appointment Policy
 - <https://universitypolicy.gmu.edu/policies/research-extended-appointment-policy/>
 - Guidelines for charging faculty salary to sponsored projects
 - Summer Salary: no more than 90% of summer effort (2.7 months) can be charged to sponsored projects during the summer

Sponsored Research

OSP updates

- Human Subjects Payments – testing new gift card procedures
- Updates to Participant Support guidelines – coming soon
- OSP Training
 - Research Admin Certificate Training: Fall 2018
 - Research Integrity program coming Spring 2019

Sponsored Research

BTS Funding Change Forms (FCFs)

- BTS FCF feature is finally here and available for use to all departments and centers within CHSS!!
- Successful BTS FCF training in July 2018
- A higher submission rate of 08/25/2018 future FCFs in comparison to last year
- Overall positive feedback on the use and usability of the new BTS function

Sponsored Research

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

Sponsored Research

Expenditure Account Codes

- Found and accessed through the GMU Fiscal Services website at: <https://fiscal.gmu.edu/expenditure-account-codes/>
- Participant support expenses require separate account codes and can also be found here

Expenditure Account Codes

[print \(excel version\)](#)

Show entries

Search:

Account Code	Account Title	Description
73641	Participant Services Excluded from F&A	Includes expenses for participant services specifically funded on a sponsored project. Examples included TOEFL exam fee, event registration fees, group (field trip) travel. The Request for Participant Support Allowance Payment form on the Fiscal Services website must be completed.
73810	Moving & Relocation	Include expenditures for services provided for relocating an employee's family and household, incidental to a new place of employment. Use this code, also, for the expenditures of a newly-employed person when appropriately approved or in conjunction with the Uniform Relocation Act. Include expenditures for travel mileage fares, meals, lodging, transportation and storage of household goods, temporary living allowance, search for a new residence, sale of former residence, and related authorized miscellaneous allowances.
73820	Personal Vehicle	(Employee) Include expenses for transportation by personal vehicle (i.e. mileage reimbursement) while traveling on University business. Exclude parking fees and tolls. Travel cost associated with attending courses should be charged to 73893.
73830	Airfare, Domestic – Except AK & HI	(Employee) Include expenditures for individual travel by aircraft to any location in the continental United States. Include parking fees and tolls. Travel cost associated with attending courses should be charged to 73893.
73831	Vehicle Rental	(Employee) Include expenditures for individual travel by leased vehicle. Include parking fees and tolls. In addition, payments made by Motor Pool to Enterprise rental car for vehicles rented in order to fulfill customer motor pool requests. Travel cost associated with attending courses should be charged to 73893.
73832	Candidate Public Carrier	Include expenditures for travel by aircraft (State and private sector), airport limousine, bus, leased vehicle, taxi, train, and watercraft paid to a candidate interviewing for a University employment position.
73833	Team Vehicle Rental	Include expenditures for group travel by bus, rental car, or other type of vehicle travel. Group travel may include University athletic teams or other groups (i.e. campers) sponsored by the University. Also, include parking fees and tolls.

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

Human Resources

Changes to Term Faculty Reappointment

Contracts / Multi-year Contracts processes:

- After three (3) single-year appointments, Term Faculty should be evaluated to be placed on a multi-year appointment.

Human Resources

Faculty Study Leave

- Applications for Tenure Track Faculty Study Leave, AY 19/20, due to CHSS Finance & HR by November 9.
- Applications for Provost Awarded Study Leave for Tenured Faculty, AY 19/20, must be submitted by email to the college (at chss@gmu.edu) by October 15.

<https://chss.gmu.edu/study-leave-for-tenured-instructional-faculty>

Human Resources

Updates/Reminders

- Notification to term faculty of non-reappointment:
 - December 14 in reappointment contract years
 - February 15 in first year of initial contract.
- Performance Evaluations:
 - Classified staff and administrative faculty evaluations due to HR October 24.
 - Faculty evaluations due to Dean's Office by October 1.

Human Resources

Updates/Reminders

- Time to update 9-month faculty sick leave balances (effective August 25 – add 30 days).
- 2018 Outstanding Achievement Awards nomination deadline is October 5, 2018.

Thank you for coming!



Please remember to turn in your
evaluation.