Agenda

10:30 am – 10:35am  Introductions
10:35 am – 10:50am  Guest Speaker – Jackson Lansford
10:50 am - noon    Finance Team Presentation and Q & A
noon - 1:00 pm     Lunch
General Budget/HR

Current
- CHSS ended FY17 with a POSITIVE balance based on the new budget model
- FY18 enrollment a bit higher than budget
- Term faculty equity raises Oct 2017
- GA stipend increase for PhD students FY19 allocations
- Leslie retiring → Kim Dight March 10

Future
- Mason raise summer 2018?
- New dean Fall 2018
- Targeted spending:
  - new and growing programs
  - highly ranked programs
<table>
<thead>
<tr>
<th>FEB</th>
<th>MAR</th>
<th>MAY</th>
<th>JUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Depts. submit Dept Funding Change Forms for Spring grant effort (cont.)</td>
<td>• Department/Program budget meetings</td>
<td>• Academic year 2019 tuition rates established by BOV</td>
<td>• Fall Health Insurance eligible students list due to Provost’s Office – students enroll beginning of Fall 2018 (Jul-Sep)</td>
</tr>
<tr>
<td>• Graduate Funding Allocation memos FY19 distributed to the departments</td>
<td>• Spring tuition waivers reconciled</td>
<td>• BTS opens for FY 2019 Fall GA and PT assignments</td>
<td></td>
</tr>
<tr>
<td>• First pay check for Adjuncts: Feb 16(^{th})</td>
<td>• Term Faculty Reappointment Contract February 28</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Last day for students to enroll in Student Health Insurance: (Feb 15(^{th}))</td>
<td></td>
<td>• BTS opens for Summer School 2018</td>
<td></td>
</tr>
<tr>
<td>• BTS open for departments to enter FY19 Teaching Load (Feb 5 – Feb 19)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• GL funds transferred from PT to GA accounts within departments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• PT budget analysis and adjustments completed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Fiscal Year end AP deadlines published (contact Dean’s office if copy needed)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Updates & Reminders

• Federal Work Study Budget – FY18

• Faculty Pcard – CHSS discourages
Subsidized Graduate Health Insurance (SGHI)

- Update on changes to SGHI.
- Reminder - If a student is GA Benefits Eligible, the student is also eligible for SGHI. Eligibility requirements for GA Benefits below.
  - Enrolled in a PhD or MFA program
  - Full-time student as defined by the University Catalog
  - Supported by tuition waiver/grant
  - Appointed to a full time (20 hours/week total) graduate assistantship with a stipend not below the “Minimum Compensation Rates” issued by the Provost Office.
- Reminder - GA Benefits Eligibility is determine in the Fall during Upload, except for newly admitted students in the Spring.
Upload

- Importance of the Part-Time and GA upload dates.
- The importance of having fully executed contract by due date.

Reminder – If an adjunct is a current Faculty member, please make sure you check the appropriate box in BTS so the proper contract is generated that requires the Provost approval

Reminder - When doing Affiliate New Employee Placeholders please include what type of employee they will be – Adjunct, Graduate Assistant or Graduate Lecturer.
Overview of Financial Aid Award Workflow

- Flowchart to determine which form should be used to pay students (handout).

- Guide outlines the new features (handout).
Cannon Printing- Copy Card

• Copy card charges and charges for printing services will now appear as separate line entries on reconciliations.

• If you need to set-up employee with additional orgs. for charges, contact Adam Forte (gforte@gmu.edu)

• Grants may not charge copies directly unless they request one general card for the grant. This must be approved by OSP and a line item must appear in the grant budget, or it will be denied.
Pcard Purchases

• You may use Pcard for purchasing equipment at Patriot Tech.
  (You may also generate a purchase order through eVA and print it out. Take it to Patriot Tech for direct billing).

• Gift cards may not be purchased with a Pcard.
Travel

• Travel under $1000.00 will not need an authorization submitted.

  Verbal approval is acceptable. Best practice is to obtain email approval prior to travel. Save and upload with your other receipts.

• New per diem limits for hotel. Allowable will be higher. Rates to be changed in the TRS system in March.

• Effective with 2018 tax changes; all relocation costs will be fully taxable.

Within the next few months, relocation process will change.
Summer Term Hiring

- BTS Summer Term screen will be opened for hiring at the beginning of March.
  Email will be sent with instructions. Process will remain the same as last year.
Sponsored Research

Update on BTS FCF

- In use by select departments since October
- Expected to be fully implemented for FY19

Summer Hiring

- Reminders coming soon about faculty summer research; verify ALL summer payments
- Summer GRA hiring – stipends paid must be consistent with stipends paid for the same AY appointment
Sponsored Research

Fiscal Year End Deadlines

- Cost transfer deadlines (externally funded projects)
- Budget office deadlines (for E&G FY18 budgets)

Labor Reallocations

- Payroll charges prior to April 25th
- Payroll charges April 25th – June 9th
- Processing ‘blackout’ period

Remember!! Labor commitments for 6/10/18 forward will NOT show as an encumbrance until FY18 ends and FY19 begins!!
Sponsored Research

Reconcile, Reconcile, Reconcile!

• CHSS Compliance Status: over 40% not in compliance with new policy timeline (for September and October 2017)
• Grants – MONTHLY reconciliations highly encouraged
• The reconciliation report summary page should be signed and dated by the PI and the reconciler
• File Naming Convention
  - Fund#_PI Name_Period Reconciled
    Example: 202222 Cohen Jan-Feb 2017
• Reconcile grants through closeout (not just through project end date)!
• University Internal Audits
  - Occur on a monthly basis
  - Auditors select one college per month
  - Review a total of 5 grants in each college
  - Upon completion, generate a final audit report
NIH Commons ID

- Beginning October 2014, the National Institute of Health requires all personnel working on a grant to have an eRA Commons ID.
- This applies to individuals with a postdoctoral, graduate and undergraduate student role who participate in the project for at least one person month.
- NIH requires the use of RPPR module in eRA Commons to submit all annual progress reports.
- Establishing a Commons ID:
  - Work with PI to identify the student/s working on the NIH award
  - Obtain the student’s full name, G number and position
  - Send student information to Gio Campbell in OSP to start profile set-up
  - Gio will initiate a profile email and forward it to the student
  - The student must login and complete their profile to generate a Commons ID
Human Resources

Full Time Faculty Hiring Proposal – RTS

Reminders/Tips

• Before submitting for Dean’s Office Review, obtain department chair approval first (Optional Approver).

• For Moving and Relocation, always select Statement #3.

• If start-up funds are offered in a contract, attach a copy of the CHSS Start-Up Policy (https://chss.gmu.edu/staff/forms).

• Once executed contract is uploaded, process is complete (no longer need to provide G number and GMU email address).
Human Resources

General Information/Reminders

• Term Faculty Reappointment Contracts due: February 28

• Faculty Separation Form – submit by April 10 if summer health insurance coverage is desired (for 9-month faculty).
  - Employee Separation Checklist – keep on file
  - Property Clearance Checklist – keep on file
Thank you, Leslie.

You will be missed!
Thank you for coming!

Please remember to turn in your evaluation.