Agenda

10:30 am - 10:50 am  Introduction and Icebreaker
10:50 am - 11:00 am  Guest Speaker: Maggie Dyre
11:00 am - noon  Finance Team Presentation and Q&A
noon - 1:00 pm  Lunch
ALL ABOUT MASON

Who graduated from Mason
Who is currently attending Mason
Who bikes to work
Who walks to work
Who drives more than 25 miles each way to work
Who participates in a weekly group at Mason
Who has season tickets to a sporting event at Mason
Who used their volunteer leave last fiscal year
Who has been at Mason more than 15 years
Who has been at Mason less than 1 year
Who uses the REC at Mason
Who has been locked out of their office

Don’t be shy, get to know your fellow CHSS staff, but only ask 3 questions to each person!
General Budget/HR

**FY16 Budget**
- E&G deficit carried forward plus permanent cut $900K
- Managing well by holding faculty vacancies open
- Important to charge faculty effort to grants
- “All Funds” approach coming FY17- ????
- Focus on Development and external funding

**MicroStrategy**
- Will replace Discoverer soon
## Fall Calendar

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>FY16 Budget Transfers done end of July including revenue carryover</td>
<td>JUL</td>
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<tr>
<td>Formal performance evaluation meetings (Aug – Oct)</td>
<td>AUG</td>
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<td>Last day to add classes: 9/8</td>
<td>SEP</td>
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<tr>
<td>Last day to enroll in Student Health Insurance: 9/15</td>
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<td>First pay check for GAs &amp; Adjuncts: 9/16</td>
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<td>GL funds transferred from PT to GA accounts within departments</td>
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<td>Last day to drop classes with a 33% tuition penalty: 9/15</td>
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<td>Fall PT budget analysis and adjustments completed (end of Sept)</td>
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<tr>
<td>Final drop deadline for classes (student will incur 67% tuition penalty): 10/2</td>
<td>OCT</td>
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<tr>
<td>Fall tuition waivers reconciled (Mid- Oct)</td>
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<tr>
<td>Department/Program budget meetings (late Oct / early Nov)</td>
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<tr>
<td>BTS opens for Spring 2016 GA and PT assignments</td>
<td>NOV</td>
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<tr>
<td>Spring Health Insurance eligible students identified in BTS and coded in Banner (only for newly admitted students)</td>
<td>DEC</td>
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<tr>
<td>Term Faculty Non-reappointment Notification Letters (Dec 15)</td>
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Updates & Reminders

• Microstrategy – Discoverer will be closed December 31, 2015. Look for Microstrategy training opportunities soon.

• Part-Time Budget Analysis – any necessary budget adjustments completed by September month-end.

• Federal Work Study Budget – we continue to have FWS funding available. To request additional funding, calculate the dept. needs and forward requests to Sarah.

• Tuition Waivers & BTS – adjusting so “planned = actual”
Subsidized Graduate Health Insurance (SGHI)

• New this year – received signed contract required prior to GA being placed on SGHI list.

• Assignments submitted during upload - when you check “Eligible for GA Benefits” box, that includes the GA on the SGHI list.

• Assignments done outside of upload – I must be notified if the GA is “Eligible for GA Benefits”, your notification is the only way I know to include on SGHI list.

• Tuition fee assessment changed to in-state rate when applicable
Graduate Student Hiring and Support Guidelines

• Great resource that will answer many questions you have.

• Can be found at the Office of the Provost website.

• Please bookmark/print

• Updated periodically
Prior to submitting an EZ-EPAF

- Verify that the SPAIDEN record (Biographical tab) is completed.
- Check Pooled Positions and verify that the position category has been set-up on the responsible fund/org.
- Check that the student is registered for enough credits for student status. Non-degree seeking students are considered wage employees.
- Check NBIJLST to verify how many positions they presently hold on campus.
- When entering Hours per week/hours per pay, bear in mind that they must be in multiples of 5. Ex: 12 hrs. per week is not valid. It must be 10, 15, 20, etc. Hours Worked guidance matrix are available at:
  http://hr.gmu.edu/hrliaisons/docs/EPAFFieldRequirements.pdf
Affiliates

• There are now three different categories of Affiliate positions.
• Faculty Teaching Affiliates will teach a course, present a lecture or work with students. They must have an Affiliate Faculty Appointment letter and an Affiliate Faculty Appointment form. The packet must be completed, signed by the Dept Chair and the Provost office. Then the packet should be forwarded to Shirley Steppe.
• Research Affiliates will stay for a specified time and usually work on research or with a faculty member in the department.
• Part-time adjunct and graduate students that are New Employees require an New Employee placeholder “NE” record submitted in BTS EZ-EPAF prior to Fall, Spring and Summer uploads.
Food and Beverage

Food and Beverage Purchases on Federal Grant (20xxxx)

• Please check with Frah Abdi first to be sure it is covered in your grant.
• Complete Food and Beverage form
• Attach receipts, invoice, attendee list, etc.
• Send to Shirley
Travel Authorization policy:
Travel authorizations do not need to come to our office for approval unless:

- Traveler is the Dept. Chair or center Director
- Travel will be charged to a Dean’s Org or Start-up
Future Funding Change Forms

- OSP is changing the process for future FCFs
  - Banner will be used instead of forms
  - Slow roll out

- BTS changes
  - Future FCF system
  - Spring start?

- Updates will be sent out
Future FCF Reminders

• Future FCFs can override each other
  • “Where should 100% of the labor be charged at the end of this FCF”

• Example: 2 future FCFs submitted, one for fall and one for spring. If you make changes to the fall and resubmit, it will cancel out the spring. In cases like this resubmit both.
Reminders

• Paperwork:
  • If you have already spoken with post award, gotten prior approval, or have special grant circumstances include a note on all paperwork so OSPs grants admins don’t send them back

• Reconciliations:
  • Wait for Lisa Kemp’s notice before running monthly report
  • Signatures
  • Include notes
General Information

• Use updated offer letter templates that are on the Provost Office website.

• Heads-up: New electronic faculty hiring process to be implemented soon.

• Position Maintenance Form with the new FY16 fringe rates is now available on the Budget Office website.
Human Resources

Faculty Study Leave

• Tenure Track Faculty Study Leave applications due to CHSS Finance & HR by November 6.

• Provost Awarded Study Leave for Tenured Faculty:
  - guidelines/submission process has been revised
  - application submission deadline is October 15, 2015
Human Resources

Term Faculty

• Notification to term faculty of non-reappointment:
  - December 15th in reappointment contract years.
  - February 24th in first year of initial contract.

• Promotion of Term Faculty
  - Casebooks due to the Dean’s Office by October 2
Human Resources

Reminders

• Performance Evaluations:
  - Classified staff and administrative faculty evaluations due to HR by October 24.
  - Faculty evaluations due to Dean’s Office by October 1.

• Now is a good time to update 9-month faculty sick leave balances (effective August 25 – add 15 days).
Thank you for coming!

Please remember to turn in your evaluation.