Agenda

10:30 am - 11:00 am  Introduction and Icebreaker

11:00 am – noon  Finance Team Presentation and Q&A

noon - 1:00 pm  Lunch
CHSS Speed Dating

Suggested Topics:

What do you do in CHSS?
Travel? Hobbies?
Pets? Kids?
Favorite thing about Mason?
Movies? Books?

Don’t be shy, get to know your fellow CHSS staff!
General Budget/HR

**General**
- Enrollment targets
- Central HR interest in efficiency – uploads, centralization/decentralization
- Summer School 2015 hiring will be through BTS

**FY16 Budget**
- Appears to be status quo with a permanent cut
- “All Funds” approach coming FY17- ????
- Looking for Out-of-State Masters Growth

**MicroStrategy**
- Will replace Discoverer - late summer or fall
Summer School 2015

Budget and Enrollment Management

- Budget managed by Robert Matz/Jill
- Course decisions – Robert Matz

BTS Upload(s)

- Shirley/Leslie, aiming for multiple uploads
- May calculate perm faculty 10% salary using BTS
- Contract formats slightly changed – we will be collecting contracts for summer
- Hours per Pay/Hours per Day

Reporting

- BTS to show hiring expense and enrollment
## Spring Calendar

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>Depts. submit Dept Funding Change Forms for Spring grant effort</td>
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<tr>
<td>Graduate Funding Allocations FY16 distributed to the departments</td>
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<td>First pay check for Adjuncts: Feb 13th</td>
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<td>Last day for students to <strong>enroll</strong> in Student Health Insurance:</td>
<td>Feb 15th</td>
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<td>BTS open for departments to enter FY16 teaching load (Feb 11 – Feb24)</td>
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<td>GL funds transferred from PT to GA accounts within departments</td>
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<td>PT budget analysis and adjustments completed</td>
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<td>Fiscal Year end A/P deadlines published (contact Dean’s office if copy</td>
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<td>needed)</td>
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<tr>
<td>Department/Program budget meetings</td>
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<tr>
<td>Spring tuition waivers reconciled and unused funds identified</td>
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<td>Term Faculty Reappointment Contracts: March 13</td>
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<tr>
<td>Academic year 2016 tuition rates established</td>
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<tr>
<td>BTS opens for FY 2016 Fall GA and PT assignments</td>
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<tr>
<td>Fall Health Insurance eligible students list due to Provost’s Office</td>
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<tr>
<td>– students enroll beginning of Fall 2015 (Jul-Sep)</td>
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Updates & Reminders

FY16 Graduate Allocations
- FY16 Graduate Allocation memos will be sent in February.
- Review your department’s memo and contact Irene Mills with questions 3-8862.

BTS Open for Departments to Enter FY16 Teaching Load (Feb 11 – Feb 24)
- Review teaching load screens carefully and make all one-time adjustments for faculty study leaves, tenure track leaves, grant buy-outs, etc. Contact Irene Mills with questions 3-8862.

Spring 2015 Tuition Waivers
- Adjust in BTS so “planned” = “actual”

GMUF Foundation Accounts
- If online access to Foundation Accounts is desired, email Irene Mills at imills2@gmu.edu.
Overload Assignments

• Appropriate contracts *must* be signed by the Provost Office
  • Kim Ford, 3A2

• For individuals who already hold permanent positions with Mason
  • Instructional Faculty
  • Research Faculty
  • Faculty Admin
  • Classified Staff - Exempt
    • CHSS does not permit Classified Non-Exempt employees to teach

• Candidates *must* sign last- after all other approvals are made!

• No pre-approval needed from Dean’s Office
BTS Overload

- BTS Overload contract generation:
  - Part-time tab

Select the appropriate classification, this will prompt BTS to generate the correct contract.
Student Fees

• A tuition waiver cannot cover student fees
  • Only exception is for Education Resource Fee (ERF)
  • Additional Fees are the student’s responsibility
Grad Assistantship Reminders

• GAs cannot have administrative duties

• GAs must have a work component

• GLs may teach no more than three (3) courses or nine (9) credit hours within a semester

• GTAs/GRAs are limited 20 hrs. per week
  • Exceptions granted with approval from:
    • Associate Dean for Academic Affairs
    • Department Chair of student’s home academic unit
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.
HR is enforcing the Supplemental Pay Guidelines

Non-exempt employees cannot be paid a lump sum Misc. Pay.

- This includes all adjuncts, students and wage employees.
- They must be hired under a wage or student wage position, **hourly rate** must be pro-rated, and hours entered on a **timesheet**.

Persons that have been paid previously through Misc. Pay positions, but have never actually worked for or recently attended GMU, may qualify to be paid through Honoraria.
Affiliates

• Affiliates are now entered into EZ-EPAF, but Teaching affiliate faculty must also submit the Affiliate offer letter, CV and signed Affiliate form. This packet will be sent to the Provost office for signature. Please then forward to Shirley for processing.

• 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 Affiliate (skeleton) placeholder record submitted in BTS EZ-EPAF prior to Fall, Spring and Summer uploads.
Summer Upload

- Hiring for summer faculty, adjunct, GL, GA and GR positions will be handled by Finance for the summer term.
- Procedure will remain basically the same for Faculty, Adjunct and GL positions. Shirley Steppe will be the POC.
- EZ-EPAF for GA and GR positions. Budget Analyst will be the POC for that effort.
- Contracts will need to be received by our office for all positions.
- Deadlines and further instructions will be sent out as soon as we have the timeline from the Summer office.
Food and Beverage

Food and Beverage Purchases on Federal Grant (20xxxx)

- Please check with OSP first
- Complete Food and Beverage form
- Attach some form of verification from OSP
- Attach receipts, invoice, attendee list, etc.
- Send to Shirley
Travel

Changes in 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

Group Travel will still require a Group Travel Authorization Form be submitted to our office for approval.
Sponsored Program Reminders

• New Executive Level Salary Cap
  • $183,300 – NIH
  • $201,630 – DOJ
  • Effective January 11, 2015

• Purchasing Limits
  • Faculty cannot negotiate purchase contracts
  • Amounts over $2,000 must go through Purchasing
  • Vendor can’t start until contract is finalized
OSP Updates & Training

• New post-award team for CHSS:
  • Rhonda Troutman
  • Shamekia Davis

• OSP sending push emails to PIs regarding budget status
  • 2\textsuperscript{nd} Saturday of each month
  • Complete PI Request for Finance Access form on Fiscal Services website
Future Funding Change Forms

• OSP is changing process for future FCFs
  • EPAFs will be used instead of forms
  • Rollout dates still in the air

• CHSS changes
  • BTS will be used for future FCFs
  • Building a system similar to EZ-EPAF

• Updates will be sent out
**Reconciliations**

**Do not send copies inner campus or via email***

- New process
  - Upload into M/shared drive
  - Upload summary sheet with signatures by month
  - Format—“Grant number, PI”

- Contact me for additional access
Human Resources

Contracts

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

• Term Faculty Reappointment Contracts – deadline is March 21.

• Non-Reappointment Notification – term faculty in first year of initial contract must be notified in writing by February 24.
Human Resources

Reminders

• 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

• Report extended sick leave/FMLA to CHSS Finance and HR.
Human Resources

Reminders

• Telework/Remote Work Agreements
  - Must be renewed annually
  - Forward agreements to CHSS Finance & HR for approval.
Thank you for coming!

Please remember to turn in your evaluation.