

MARTIN-GATTON CAFE

ADMINISTRATIVE USERS' GROUP

November 7th, 2023

9am – 10:30am

Location – Zoom

FOLLOW-UP NOTES

1. Budget & Finance

- a. **Federal Year End** – Jason
 - i. We are nearing the end of our federal FY23 year-end process. We are working to clean up accounts by the end of November. After this, we will submit reports to NIFA and work on the AD-419 reporting process. A separate training will be held later for impacted departments.
- b. **PBO Update on Promotional Items** – Cristin – [Slides on page 3](#)
 - i. The Provost Budget Office recently provided information on purchasing promotional items for employees. This includes logoed shirts, mugs, etc. Per the IRS, promo items should be nominal in value and infrequent. The total value of promo items received by an employee should be \$100 or less in a fiscal year. The list of contracted vendors for promo items can be found on the [procurement website](#) (UK login needed to access).
- c. **E-Catalog Changes Coming in November** – Shelby – [Slides on page 7](#)
 - i. Accounts Payable has been sending out information on past due invoices, to help reduce the university's outstanding items. Changes coming in November to e-catalog items. Approval will be required on all shopping carts, including Office Depot orders. Goods receipts will no longer be required for catalog items under \$5k.
- d. **New RPA Questionnaires** – Jason
 - i. The University Budget Office has rolled out new questionnaires for Revenue Producing Accounts (income accounts). Departments will be required to submit an annual RPA questionnaire by November 15th this year. Accounts affected by Unrelated Business Income Tax will also be required to submit an annual UBI questionnaire. Affected departments have been contacted. Find the updated forms [here](#).
- e. **Enterprise Rentals – Nicholasville Rd Location Change** – Cristin
 - i. Enterprise Rentals recently closed their Nicholasville Rd location. The location has moved to past Brannon crossing towards Nicholasville. The High Street and Winchester Rd locations are now likely the closest to campus.
- f. **15-Passenger Van Rentals** – Cristin – [See announcement on page 10](#)
 - i. Ford has announced a recall on many 15-passenger vans, which has created shortages for all rental companies. University Financial Services encourages depts to make vehicle rentals as far in advance as possible. Contact [Travel Services](#) for questions.
- g. **FAST Compliance Deadline – Dec 31st** – Jason – [Slides on page 11](#)
 - i. Business officers should indicate FAST requirements on the SAP Access Request Form when a new employee is hired. Criteria for mandatory FAST participation and compliance deadlines can be found on the slides attached.

2. Grant Reminders – Angela

- a. **Reviewing Subcontract Invoices & Attachments**
 - i. Subcontractor invoices must be reviewed monthly with reconciliations to ensure payments are appropriately applied. Check invoice numbers to be sure they are going in chronological order and there are not any missing, check to be sure that the cumulative amounts listed on the invoice match the PO. We recommend invoice tracking using [this spreadsheet found on our website](#) under Grant Resources.
 - ii. PO check info can be found using [these instructions](#).
 - iii. **Related t-codes** – ME2K (Purchasing Documents per Account Assignment), FK10N (Vendor Balance Display), FBL1N (Vendor Line-Item Display)
 - iv. Find more info on Financial Compliance and Subaward Monitoring [here](#).
 - v. Requests for SIR designations should be submitted to subawards@uky.edu. Provide Department Number, Name and link blue, PO and Contract Number 3XXXXXXXX-XX-XXX.
- b. **OSPA Grants in CDEM**
 - i. CDEM entries should go through the end date of the grant even if it crosses fiscal years. Pls should always charge a grant either direct charge or cost shared except for certain circumstances (i.e. Equipment Only or Conference Only Grants). If they aren't charging, you could be out of compliance.
 - ii. The current salary cap is \$212,100. Find the Salary Cap Template [here](#) and instructions [here](#). Salary Cap changes every January.

3. HR & Payroll – Slides on page 17

- a. **Prepping for Performance Evaluations (Lunch & Learn Jan. 8)** – Le Anne
 - i. Be sure to partner with your chair to develop a communication plan and timeline for your dept's performance evaluations. Review MJRs to ensure they are accurate before PEs begin. Contact our HR team if changes are required that affect greater than 50% of MJRs. [Lunch & Learn Registration](#)
 - ii. Reminder – PE evaluations are required by the college for anyone in post-retirement position. Our HR team will send a list of affected employees out to supervisors.
- b. **Holiday Planning Survival Toolkit** – Le Anne
 - i. UK offers a variety of benefits to help us get through the holidays. Find more information on the slides attached.
 - ii. [Central HR Events Registration](#)
- c. **End of Calendar Year Tips** – Le Anne
 - i. Reminder to enter your holiday hours. Payroll coverage and deadlines will vary with the holiday schedule. Find a summary of coverage and deadlines on page [36](#).
 - ii. Earliest retro date
 - Bi-weekly ERD will reset to 9/24/2023 on 11/20/23.
 - Monthly ERD will reset to 10/01/2023 on 11/14/23.
 - iii. It's election day! See UK Voting Leave Policy [here](#).
 - iv. W2 prep – [Find instructions for accessing online statement](#).
- d. **Service Awards Orders** - Le Anne - Order sheets are due by November 10
- e. **Mentor Program and Staff Professional Development Fund update** - Le Anne
 - i. Find information on our mentor program [here](#).
 - ii. Our college supports staff professional development opportunities by providing funding assistance through our [Staff Professional Development Fund](#).
 - Upcoming opportunity – Southern Association of College and University Business Officers conference – more info on page [44](#). Find more info on SACUBO [here](#).
 - [Staff Professional Development Fund Application](#)
- f. **HR Huddle Certification Series** – Adam – still time to complete!
 - i. The HR Huddles may be over for 2023, but if you missed a session, they're still available to view online!
 - ii. Just go to our training page, located [here](#). Under the Guides section, click the HR Huddle recordings to view any you may have missed. Instructions on page [42](#).
 - iii. Afterward you can email Adam Pickerill and let him know the code word at the end of the videos to receive credit – those that finish all 3 will receive a certificate, which will look great to attached to this year's upcoming PE!

4. Other

- a. **[New Ag Comm Site for Marketing Resources](#)** – Cristin
 - i. Ag comm has launched a new SharePoint site where all new marketing resources can be found.
- b. **Update on Departmental Staffing** – Jason
 - i. [Congratulations and welcome to our new CAFE staff members!](#)
 - Katie Allen – Arboretum – start date 10/22
 - Casey Gibson – Princeton – start date 10/9
 - Sara Green – Emergency Mgt – start date 8/21
 - Marelle Adams – Diversity – start date 9/1
 - Ellen Weisenhorn – PSS – start date 11/6
 - Barbara Stiefel – Ag Comm - start date 8/14
- c. **Reminder on Email Signatures**
 - i. Be sure to include your phone number, address and other contact information in your email signature. We have employees located off-campus and this makes it easier for them to reach you.
- d. **Display full name in Zoom window** – If you did not display your full name in the attendance window, please contact Cristin so your participation can be recorded. Find instructions on changing your Zoom name while in a meeting [here](#) or prior to logging in [here](#).
- e. **Please share this information with others in your department!**

Your input is valued! If you have any requests/questions you would like to see answered in future meetings, please send those to Cristin Costello (Cristin.sullivan@uky.edu).

****NEXT MEETING February 13th at 9am ET via Zoom****

PROMOTIONAL ITEMS SUMMARY

- What are Promotional Items?
 - Goods imprinted with University-related logos or wording
 - Required to be purchased through a contracted promotional supplier to comply with trademark licensing
 - Intended to promote University programs, projects and initiatives
- Per the IRS, Promotional Items Should Be “De Minimis”
 - Nominal Value
 - Infrequent

PROMOTIONAL ITEMS

- Nominal Value
 - Low value
 - \$100 or less total/year (per the IRS)
 - Some peers have a limit of \$25 per promotional item (Alabama, UAB)
- Frequency
 - Infrequent
 - Occasional
- Total value of promotional items received by an employee within a year should be \$100 or less and promotional items should be given occasionally

PROMOTIONAL ITEMS

- Promotional Items would be considered gifts when they are not “de minimis”
 - An employee receives more than \$100 of promotional items in a year
 - and/or
 - Promotional items are given to employees frequently
- Greater than nominal value would be considered taxable and reportable

WHY AM I HERE?

Responding to questions:

Does anyone have a good procedure for SWAG items? We want to encourage attendance and get people back together but aren't clear on what we can offer as promotional items.

We have departments wanting to order coffee mugs for retreats. Any guidance on this?

Yes, if up to \$100/calendar year total, infrequent, imprinted with a University logo/wording, use a contracted vendor, and promotes the University

<https://purchasing.uky.edu/sites/default/files/2022-11/quickrefguide.pdf>

PURCHASING AND GR/IR UPDATES

UBO MEETING

OCTOBER 18, 2023

PRESENTER:

CARA NELSON

ACCOUNTS PAYABLE SERVICES DIRECTOR



GR/IR UPDATES

MRBR Blocked for Quantity:

- Invoices posted through July 31, 2023
 - On September 11, 2023, \$6.9M in invoicing was blocked for quantity.
 - As of October 13, 2023, \$3.3M was blocked for quantity.
- Now past due - For invoices posted through August 31, 2023, \$4.9M blocked for quantity

Payment terms – typically net 30. If not paid within 30-days, KY law allows vendor to charge late fees of 1% per month



UPCOMING CHANGES

Changes for Potential Go Live Date of 11/15/23

1. For e-Catalog orders of \$5K or less:
 - Shopping cart approval required on all orders, including Office Depot
 - Remove the goods receipt requirement
2. Develop a tracking process for "disputed" or "returned items"
3. All e-Catalog PO's over \$5K and non e-Catalog POs will require a goods receipt
 - The GR records the expense on PO's unless the PO contains split accounting
4. Create TABLEAU report for monitoring. Report is currently under development.

Changes still under development for calendar year 2024.

1. Implement escalation notification process for those invoices requiring goods receipt
2. Note field for communication on PO issues.
3. Joint quarterly review with Accounts Payable and Purchasing



From: List of UK Campus Business Officers - IRIS Communication <UKBUSOFCRCAMP-L@LSV.UKY.EDU> on behalf of Bugay, Lexi <alexis.bugay@UKY.EDU>
Sent: Monday, November 6, 2023 4:20 PM
To: UKBUSOFCRCAMP-L@LSV.UKY.EDU
Subject: 15-Passenger Van Rentals

Good Afternoon,

Our Rental car vendor has notified UK that Ford has announced a recall on a large number of 15-passenger vans. This recall has limited the inventory of 15-passenger vans for all rental car companies.

The best available information we have at this time, is that an anticipated resolution date will be early 2024.

Call to action: If you have an event or trip that requires the rental of a 15-passenger van, please make the vehicle rental arrangements as far in advance as possible to lock-in the availability of dates for your travelers. Reservations for 15-passenger vans are not available through Concur, please reach out to a local Enterprise branch or other rental car company to reserve a 15-passenger van.

If you have any questions, please reach out to Travel Services at travelservices@uky.edu.

FAST

FINANCE & ADMINISTRATION SPECIALIZED TRAINING

UBO Meeting | October 18, 2023



Why FAST?

Challenge

Lack of understanding and accountability regarding internal controls

The UK-PURPOSE
Trust, Transparency
and
Accountability

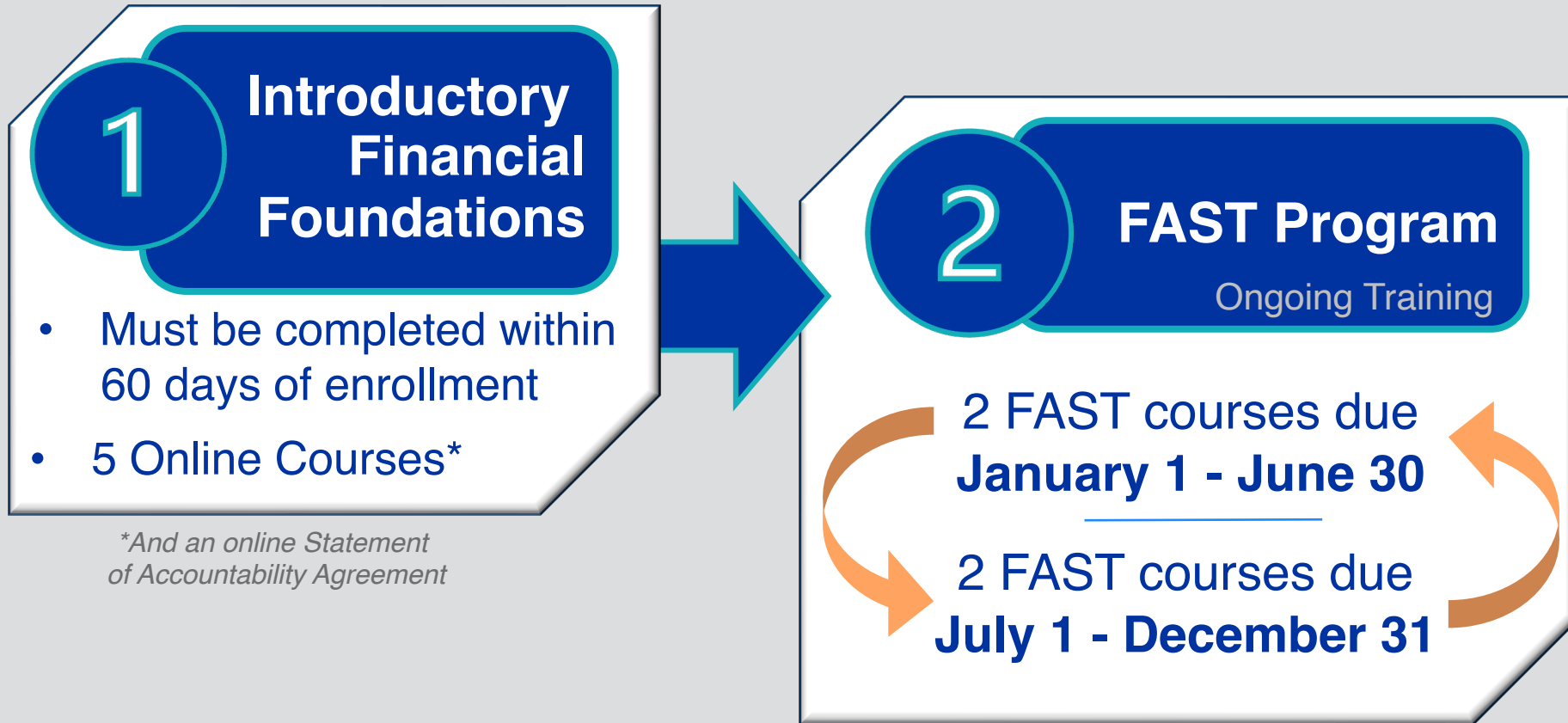
FAST
was created for
employees
with fiscal
responsibilities

Solution

FAST WBTs:

- Raise Awareness
- Increase Knowledge
- Reinforce Compliance
- Provide Resources
- Boost Effectiveness
- Enhance Efficiency

Program Components



Note: At this time, courses cannot be repeated for credit

Mandatory Participants

NEW PARTICIPANT ENROLLMENT

- Business Officers complete SAP Access Request Form when a new employee is hired
- Supervisors submit enrollment request form on FAST website
- Human Resources sends monthly report of new hires with fiscal responsibilities to FAST team
- Word of mouth

CRITERIA

- For employees in positions with fiscal responsibilities including, but not limited to:
 - Concur object approval roles (travel, expense and procard)
 - Cash management
 - Account reconciliation (review and approval functions)
 - Fiscally responsible person for cost centers
 - Approval to post and release SAP Financial and HR transactions
 - Approval of pay transactions
 - Providing financial reporting to college/unit leadership

Compliance Deadline and Communications

- Compliance communications plan includes:
 - Newsletter to all FAST stakeholders
 - Emails to incomplete participants and their supervisors
 - Lists of incomplete participants to Area Fiscal Officers and Senior Business Officers

Next Compliance Deadline is December 31, 2023

Please consider the impact of upcoming holidays (Thanksgiving, Christmas, Special Holidays, New Years) to complete requirements by the deadline

How You Can Support FAST

- While onboarding new employees with fiscal responsibilities, request enrollment when completing SAP Access Form
- Enroll current employees who meet criteria through the [FAST website](#)
- Check compliance of participants in your area
- Suggest future topics through [this form](#) on our [website](#)
- Be a subject matter expert or workgroup member on a future course

Contact the FAST team with feedback and suggestions at fandatraining@uky.edu



M.G. CAFE
Business Center HR Team
AGBusinessCenter@uky.edu

Users Group – HR Topics



STAFF PERFORMANCE EVALUATIONS 2023

PREPARATION



Update Position Descriptions

If any job duties changed in 2023 please work with your unit HR Admin to submit any updates by November 22.

Prepare Communication

Consider scheduling a staff meeting to discuss:

- Unit expectations and timeline
- Browser preferences: Chrome
- You could even show the Participating in Your Evaluation Video

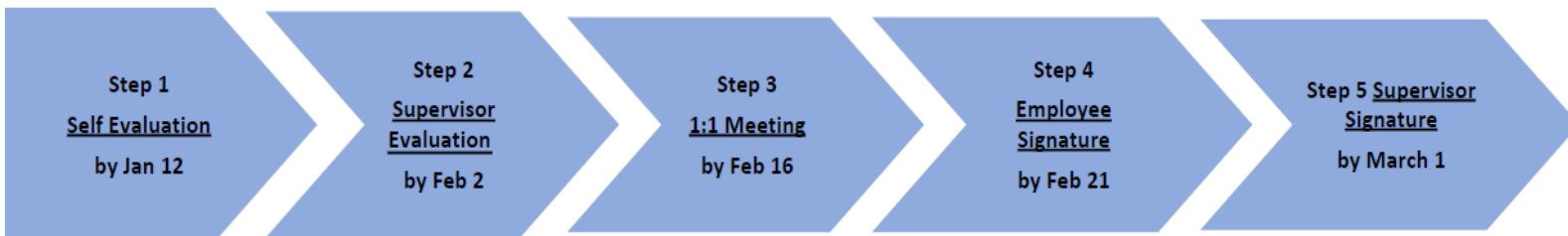
[HTTPS://CAFEBUSINESSCENTER.CA.UKY.EDU/RESOURCES/HR-PAYROLL/EMPLOYEE-RESOURCES/VIDEO-TUTORIALS](https://cafebusinesscenter.ca.uky.edu/resources/hr-payroll/employee-resources/video-tutorials)

Pro Tips – Avoid requesting a supervisor update until after a PE is complete.
--If a supervisor is going to be separating, retiring, or going on extended leave, during this cycle, please plan accordingly.

RECOMMENDED TIMELINE

- Self-Evaluations released **December 4**
- The Martin-Gatton CAFE PE deadline will be **March 1, 2024**

Example Timeline



RESOURCES



- **Employee Resources (M-G CAFE) page:**

[https://cafebusinesscenter.ca.uky.edu/content/Employee Resources](https://cafebusinesscenter.ca.uky.edu/content/EmployeeResources)

- **Supervisor Resources (M-G CAFE) page:**

[https://cafebusinesscenter.ca.uky.edu/content/ SupervisorResources](https://cafebusinesscenter.ca.uky.edu/content/SupervisorResources)

- **PE Tool Kit**

[uky.edu/pe/eval](https://cafebusinesscenter.ca.uky.edu/pe/eval)

TRAINING

The Martin-Gatton
College of Agriculture, Food and Environment

Lunch and Learn



Lunch & Learn (supervisors):

Managing the Performance Evaluation Process

January 8, 2024 – to register

https://uky.azl.qualtrics.com/jfe/form/SV_IY2QQ7KkEiZqilU

Note: All Lunch & Learn sessions are recorded and available to view after the session.



Weekly status reports will be provided each week beginning in January.



Score reports will be provided to chairs/department heads in March.



Performance Improvement Plan information will be distributed to applicable supervisors in March.

Reports



HOLIDAY PLANNING SURVIVAL TOOLKIT



EMPLOYEE
DISCOUNT
PROGRAM

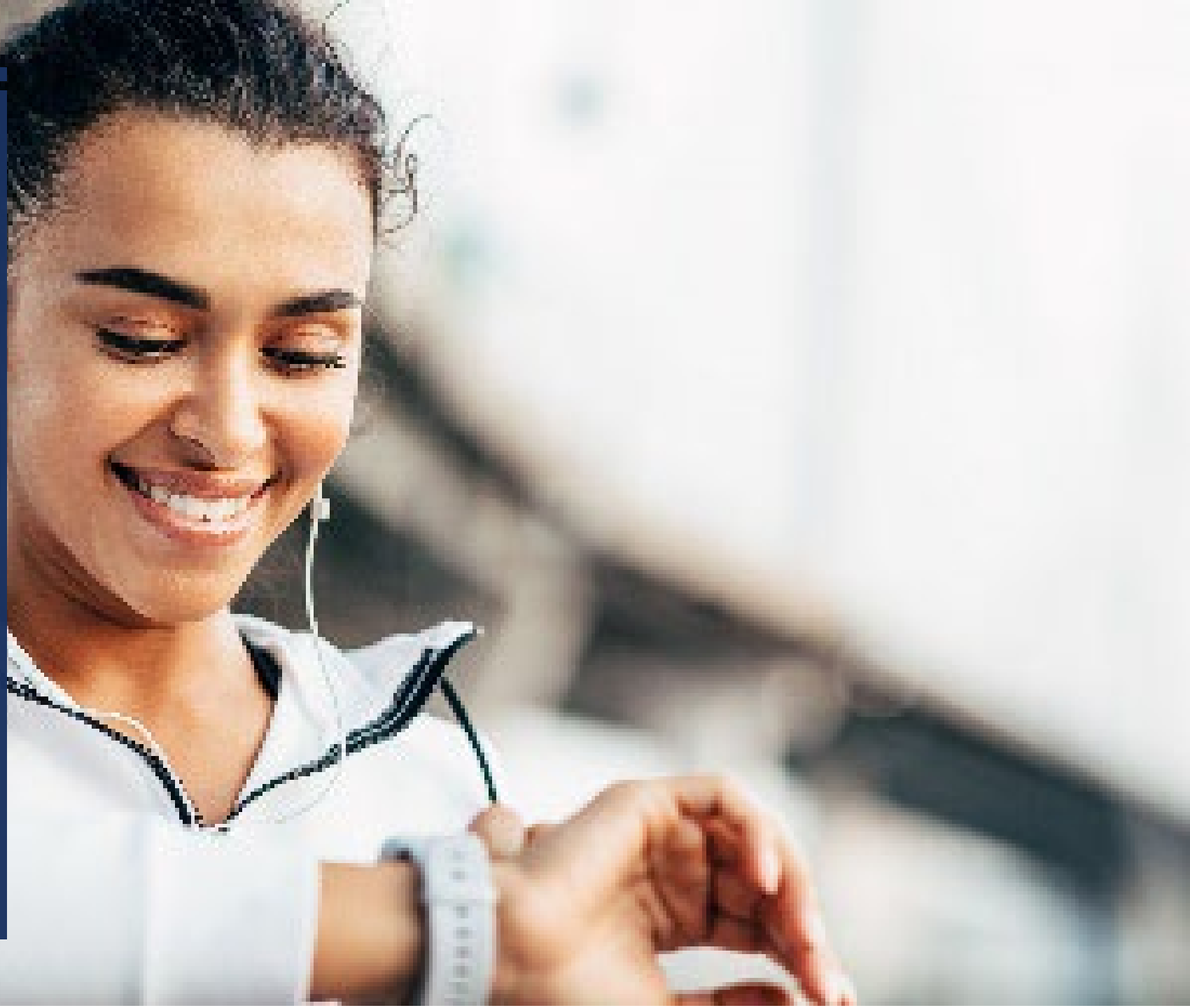


FITNESS WEARABLE DISCOUNT

- Did you know that Anthem provides 20-22% discounts on Fitbits and Garmins for those on UK benefit plans

■ Log in or create an account to get started

www.anthem.com/account-login/



Grab Your Groceries on the Way Home!



Everyone is busy. Let us help you out with one of your chores.

UK employees and students can now grocery shop online and then pick up at the Orange Lot.

The location is listed as “Hometown Pickup – Kroger Field.”

Pick up days & times:

- ☐ Mondays: 4-8 p.m.
- ☐ Thursdays: 4-8 p.m.
- ☐ Fridays: 5-7 p.m.
- ☐ Saturdays: 9 a.m. to noon (no availability on Saturdays with home football games)

A close-up photograph of a person's arm in a blue long-sleeved shirt reaching towards a market stall. The stall is filled with fresh produce, including a large green watermelon, various green leafy vegetables, and red tomatoes. The background is slightly blurred, showing more of the market environment.

Need fresh veggies?

Farm Stand

1505 College Way

Thursday from 4-6pm.

They accept cash, check, and card at the Farm Stand. Please bring your own bags. Items for sale will always be listed at the blog at ukcsa.wordpress.com

TDL Well-Being Days



Big Blue Family Care:
Providing occasional, and
part-time childcare needs



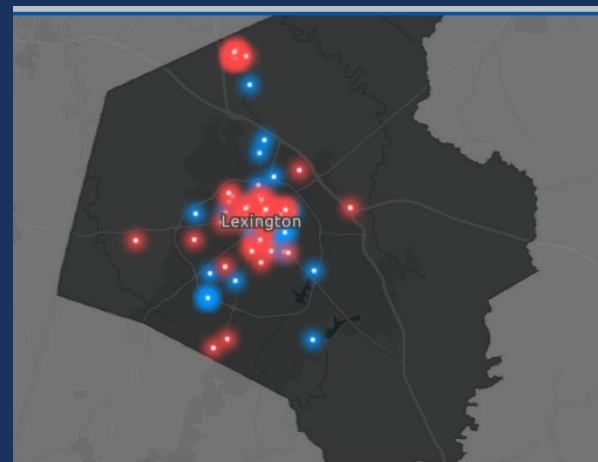
Turkey Time Bingo with a Gratitude Twist

Tuesday, November 7, 2023
11:30am - 12:00pm

As we head into the season of Thanksgiving, we find our lives are full and sometimes overflowing with to-do tasks providing our minds with ample opportunities to stress or worry. Let's pause, slow things down, and play the classic game of bingo with a gratitude twist.

<https://ukhr.uky.edu/wellness/Misc/Presentations>

ACCESS THE CITY OF LEXINGTON PUBLIC ART MAP



[HTTPS://EXPERIENCE.ARCGIS.COM/EXPERIENCE/2FE36426A1E74F
BEA6A4C7503E8CAB87?ORG=LFUCG](https://experience.arcgis.com/experience/2fe36426a1e74fBEA6A4C7503E8CAB87?ORG=LFUCG)

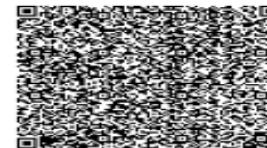


Circle of Love

UK's annual gift collection program for Fayette County Public Schools!

**Donations due Nov 27 - Nov 29
in the Gatton Student Center,
room 331**

**Scan this QR Code for
more information and
to access our Sponsor
Sign Up Sheet**



UK Student Organizations and Activities
Office for Student Success

END OF CALENDAR YEAR REMINDERS



Example Entry

HOLIDAY-Thanks...	11/23/2023	11/24/2023	S. A..	16.00
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Type of Leave	Start Date	End Date	P. §	Absence hours
HOLIDAY-New Year	01/01/2024	01/01/2024	S. S..	8.00
HOLIDAY-Special	12/29/2023	12/29/2023	S. S..	8.00
HOLIDAY-Special	12/28/2023	12/28/2023	S. S..	8.00
HOLIDAY-Special	12/27/2023	12/27/2023	S. S..	8.00
HOLIDAY-Special	12/26/2023	12/26/2023	S. S..	8.00
HOLIDAY-Christmas	12/25/2023	12/25/2023	S. S..	8.00



**HOLIDAYS:
NOVEMBER &
DECEMBER**

END OF CALENDAR YEAR PAYROLL COVERAGE

BW PP 26 (12/3 – 12/16/23) – Normal Timeline

- The payroll deadline will be on Monday, 12/18/23

BW PP I (12/17/23-12/30/23) –

- Time entry should be recorded by **Wednesday 12/13/23** to allow supervisors ample time to approve before the holidays.
- Plan to review Timesheet, Unapproved Leave, and Unapproved Time Reports on the morning of Friday, 12/22/23.
- The payroll deadline will be 1/2/2024 (noon)



If an employee's **mailing address** has changed, please ask them to update their address.

**Sign up to get W2 via myUK

It is also a good time to verify that their **UK Alert** information is up to date as well as **beneficiary** settings

Depending on county of residence, some employees will have 2 W2 documents to print, while others will have 1.

The UK Benefits Office will be mailing the 1095 benefits forms to applicable employees.

Employees who have separated will no longer have access to myUK. A hard copy W2 will be mailed to the address listed in SAP. For separated employees, HR Administrators have access to enter address updates as needed.

Pro Tip: Former employees can access docs via-
<https://mydocs.uky.edu/>

W-2 REMINDERS



Remember to also check Emergency Contact information.



IMPORTANT DATES

Earliest Payroll Retro Date

- Bi-weekly ERD will reset to 9/24/2023 on 11/20/23.
- Monthly ERD will reset to 10/01/2023 on 11/14/23



Timely Entry is important to ensure Canvas access.

QRG – PTI SAP Entry: Available on the SAP section of the CAFE HR Administrator page

Pro Tip: Canvas access is granted as soon as the assignment is entered in SAP.

Therefore, it is very important to coordinate the PES/I-9 process in a timely manner to allow the PTI early Canvas access for course preparation purposes.

PTI SAP ENTRY





**MENTOR PROGRAM/STAFF
PROFESSIONAL
DEVELOPMENT FUND
UPDATE**

■ Mentor numbers:

48 Staff

4 Faculty

Total 52

**■ Staff Professional development
fund:**

16 applicants awarded

\$11,153

9 different departments

SERVICE AWARDS



This year staff/faculty with a regular service date of 2018, 2013, 2008, 2003, 1998, 1993, 1988, 1983 and 1978 will be recognized for reaching a milestone during calendar year 2023. This information is listed as the regular service date on SAP screen 41 (with breaks in regular service – this field is recalculated).

Employees will be able to select from several options from various vendors.

Order sheets are due by November 10.

Service award packets will be distributed in early spring and will include: Awards, certificates, recognition letters, and service award enhancement ideas.

Guides, Recorded Trainings and Video Tutorials

HR Administrator Resources

HR Administrator Video Tutorials

Quick Tip Videos

Showcase Events

HR Huddle recordings

Lunch & Learn Sessions



HR HUDDLE CERTIFICATION SERIES





QUESTIONS?

From: info@sacubo.org on behalf of Southern Association of College And University Business Officers <info@sacubo.org>
Sent: Friday, November 3, 2023 8:40 AM
To: Costello, Cristin
Subject: SACUBO 2024 Annual Meeting: Registration is Now Open

CAUTION: External Sender



Registration

| Call for Proposals

| Hotel & Travel

SACUBO 2024 Annual Meeting

Registration is now open!

The Southern Association of College and University Business Officers is excited to announce that registration is now open for the **2024 Annual Meeting** taking place in Louisville, Kentucky, on **April 14-16, 2024**, at the **Galt House Hotel**. Join your colleagues and peers from higher education institutions around the region for relevant and high-quality professional education and networking opportunities. In the evenings, enjoy the entertainment, dining, and shopping opportunities in the city! **Register** before **March 8, 2024** to take advantage of our early bird pricing.

Register Now

Early bird registration closes on March 8, 2024.

Book Your Hotel Room

2024 Annual Meeting attendees can now book their rooms at the [Galt House Hotel](#) with the [reservation link](#). There are rates available for single and double rooms starting at \$209. [Book your hotel room](#) before **March 21, 2024** to secure the best price.



[Book Your Room](#)

Call for Proposals

The SACUBO Professional Development Committee and Best Practices Committee invite you to [submit a proposal](#) for the [2024 Annual Meeting](#) before **November 10, 2023**.

Presenting at the meeting offers an opportunity to share effective strategies and showcase solutions to manage many of the challenges facing higher education today. The meeting typically brings together more than 600 college and university business officers, including CFOs, Vice Presidents of Finance & Administration, AVPs of Finance, Controllers, Comptrollers, Accountants, Budget Directors, AVPs of Facilities, Auxiliary Directors, and others.

Those who respond will also have the option for their proposal to be considered for the [Best Practices Award Program](#). This program showcases the best of college and university business officers' efforts in

creating better, more efficient, and customer-friendly business practices. **Past submissions** have showcased a wide variety of unique programs improving the operations of the college campus. The 2024 Best Practices competition will select up to five finalists to present their "best practice" at the Annual Meeting. The institution with the overall "best practice" will receive an honorarium of \$1,500. Runners-up will receive \$750.

[Submit a Proposal](#)

The deadline to submit a proposal is November 10, 2023.

If you have any questions, please contact us at info@sacubo.org.



**SOUTHERN ASSOCIATION OF COLLEGE AND
UNIVERSITY BUSINESS OFFICERS**

Connect on LinkedIn



www.sacubo.org

+1-206-210-7751

info@sacubo.org

This email was sent to cristin.sullivan@uky.edu by info@sacubo.org

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