INITIATIVES USER-GUIDE

Initiatives Web System

Please enter your network username and password.

Username: 
Password: 
Login

Type the following address into your internet browser:
https://webapps.uts.sc.edu/budgetinitiatives/default.asp

Please enter your network username and password to access your account.
USERNAME:
PASSWORD:

For all new users, please provide your network username for the initial setup and access to me via email simpkinw@mailbox.sc.edu.

NOTE: Helpful tips are provided in the tan box to assist you.

Check the box under the Manage header when ready to submit all initiatives.
After you have successfully logged in, the Operating Unit information is displayed. To begin creating initiatives, click the **Create/View Initiatives** link.

Click the **Create New Initiative** button. A series of required questions will be provided in the following tabs: **Justify, Resources, Full-time, Part-time, Operating, One-time, Status**

To print a single tab, click the **Print** link or icon at the top of the appropriate page.

The first tab is the **Justify** tab. It contains the requested information section, summary section, and the request justification section.

**UNIT’S INITIATIVE PRIORITY NUMBER:** Enter the priority number that this initiative represents for your unit with the number one (1) representing the highest priority ranking.

**INITIATIVE TITLE:** Enter the title of this initiative.

**DEPARTMENT NAME:** Enter the title(s) of the individual department(s) or major organizational unit for which this initiative provides resources.

**FISCAL YEAR:** The fiscal year is defaulted to the upcoming fiscal year. Confirm the fiscal year in which the initiative is to be implemented. An explanation should be provided if implementation is beyond the upcoming fiscal year.
The Summary section is read-only. All shaded fields are read-only and cannot be edited.

### Summary

<table>
<thead>
<tr>
<th>Description</th>
<th>FTE</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>Full-time Personnel</td>
<td>0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Part-time Personnel</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>Recurring Operating Expenditures</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>One-time Equipment or Start-up Costs</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>Total Request</td>
<td>0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Net Funding Needed</td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

The Justification section should clearly address why the initiative must be supported through the use of new funding and how the initiative will impact the unit's ability to maintain or accomplish the specific planning objectives. Please indicate if the implementation of this initiative is contingent on new funding.

### Request Justification

Provide a concise description/justification for this initiative request.

Why must this initiative be supported through the use of new funding?

Identify the Unit Goal(s) and Objective(s) supported by this initiative. Describe how this initiative enables the unit to achieve these objectives.
If you already have any existing resources for this initiative, please enter it in this section. Please select the type resource in the drop down box. Enter the department/fund where the resource resides. Enter the description, account, and the amount that corresponds with the resource. Please do not use general accounts such as 50000, 53000, etc.

Click the Add New button.

If any information is entered incorrectly click the pencil icon to edit the entry or delete by clicking the trash can.
FULL-TIME SECTION

If full-time positions are a part of the initiative request, please enter the required information in the following section.

<table>
<thead>
<tr>
<th>Full-time Personnel</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td>---</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Dept/Fund</strong></th>
<th><strong>Full-time Classified Positions</strong></th>
<th><strong>FTE</strong></th>
<th><strong>Account</strong></th>
<th><strong>$</strong></th>
<th><strong>Update</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Classified Positions</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Dept/Fund</strong></th>
<th><strong>Full-time Unclassified Administrative Positions</strong></th>
<th><strong>FTE</strong></th>
<th><strong>Account</strong></th>
<th><strong>$</strong></th>
<th><strong>Update</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Unclassified Administrative Positions</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Dept/Fund</strong></th>
<th><strong>Full-time Faculty, Deans, Acad Dept Head Positions</strong></th>
<th><strong>FTE</strong></th>
<th><strong>Account</strong></th>
<th><strong>$</strong></th>
<th><strong>Update</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Faculty, Deans, Acad Dept Head Positions</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Dept/Fund</strong></th>
<th><strong>Full-time Librarians Positions</strong></th>
<th><strong>FTE</strong></th>
<th><strong>Account</strong></th>
<th><strong>$</strong></th>
<th><strong>Update</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Librarians Positions</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>

| **Total Full-time Salary Costs** | 0.00 | 0.00 |

Select the type of position from the drop down list.

**DEPT/FUND**: Enter the corresponding department/fund number(s). If more than one dept/fund is being affected by this initiative, enter the dept/fund number followed by the applicable titles and codes. The department/fund numbers must be within the same Operating Unit code.

**DESCRIPTION**: Enter the position title in the appropriate classification section (Classified, Administrative, Faculty, Librarians).

**FTE/ $**: Enter the appropriate number of new full-time positions for a particular title and the salary dollars required to support this initiative. Additional FTE slots are not provided in this process. Please follow the process established by the Division of Human Resources for new or additional FTE slots.
The costs entered for each of the fringes listed is the summary for all positions.

The Health/Dental Insurance costs should be summarized for all positions. Click the Add New button.

### Health Insurance
**Effective 1/1/2018 – 12/31/2018**

- **Coverage Type**: All Health Plans
- **Employee Only**: $378.50/ Month
- **Employee/Spouse**: $746.26/ Month
- **Employee/Child**: $579.02/ Month
- **Full Family**: $933.44/ Month

### Dental Insurance
**Effective 1/1/2018 – 12/31/2018**

- **per covered employee (12 mths)**: $13.48 per month

The following link will provide information related to the calculation of fringe benefit costs and health insurance costs based on the type of employee. The health insurance rate is based on the coverage type.

Follow the above guidelines for each full-time position. Click the Update button to revise the entry to include Health/Dental Insurance for all positions added.
Select the type of position from the drop down list. Provide the department/fund, description, hourly rate, hours, account, and salary of the new part-time position.

**DEPT/FUND:** Enter the corresponding department/fund number(s). If more than one dept/fund is being affected by this initiative, enter the dept/fund number followed by the applicable titles and codes. The department/fund numbers must be within the same Operating Unit code.

**DESCRIPTION:** Enter the position title in the appropriate classification section, i.e., Teaching Faculty (See ACAF 1.06 for approved titles), Graduate Assistants (See ACAF 4.00 for titles), General Wages, Undergraduate Student Assistants, or Undergraduate Federal Work Study Students. See **Job Classifications** for classified state titles.

**HOURLY RATE:** Enter an hourly rate for general and student positions requested in this initiative that is at least equal to the January rate for a particular title. Enter the requested academic year (August – May) compensation amount for graduate assistantships and teaching positions requested in this initiative.

**HOURS:** Enter the number of hours that the general, student and federal work study position is expected to work during the academic year. Enter the number 1 for graduate assistantships and teaching & research positions.

**ACCOUNT:** Enter the account that corresponds with the position title.

**$ TOTAL SALARY:** Enter the total dollar amount required to support this initiative.

Enter the positions fringe at the bottom of the page. See the [link](#) for current rates and calculation methods based on employee type and appointment.

Click the **Add New** button

Follow the above guideline for each part-time position. Click the **Update** button to revise the entry to include fringe for all positions added.
If operating costs will be associated with the new initiative, please enter all recurring operating expenses in this section.

**DEPT/FUND**: Enter the corresponding dept/fund number. If more than one dept/fund is being affected by this initiative, enter the dept/fund number followed by the applicable titles and accounts.

**DESCRIPTION**: Briefly describe the expenditure, i.e., contractual services for design, microscopes, etc.

**ACCOUNT**: Enter account related to the operating expenditure description.

**$ AMOUNT**: Enter the dollar amount for a particular item related to this initiative.
ONE-TIME SECTION

<table>
<thead>
<tr>
<th>One-time Equipment or Start-up Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept/Fund</td>
</tr>
<tr>
<td>-----------</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

- Dept/Fund: Enter the corresponding department/fund number(s). If more than one dept/fund is being affected by this initiative, enter the dept/fund number followed by the applicable titles and codes.
- Description: Enter the description of the anticipated one-time cost.
- Account: Enter the account related to the description. (Equipment items include all accounts beginning with 56XXX and over $5,000).
- $: Enter the dollar amount for a particular item requested in this initiative.

Typically, large equipment purchases will include maintenance costs for one-year or more. However, if maintenance costs are significant or are not part of the purchase price, you may wish to note this in your narrative.

Before submitting, please be sure to check your entry for spelling and grammatical errors due to live reporting. Live reporting means the entry is automatically submitted to the Administration from the system. To submit your initiatives, click the checkbox under the Manage header on the Operating Unit List page. You will receive a message to confirm your submission.

Once the initiatives are submitted successfully, your account is locked. Please send an e-mail to your budget analyst. Once the Budget Office and Vice President review the initiatives, a VP Initiative Priority...
Number will be assigned. You may check online to see if initiatives have been reviewed and the status of each initiative.

Log on to the Initiative web system.

Click the Create/View Initiatives link.

<table>
<thead>
<tr>
<th>OU</th>
<th>Department</th>
<th>Initiatives</th>
<th>Manage</th>
<th>Reviewed</th>
</tr>
</thead>
<tbody>
<tr>
<td>CL014</td>
<td>University Technology Services</td>
<td>Create / View Initiatives</td>
<td>✔</td>
<td></td>
</tr>
</tbody>
</table>

Under the Tasks header, the status of the initiative will be provided.
- If approved, a ✔ check mark will appear.
- If rejected, a ✗ mark will appear.
- If more information is needed, a ❓ question mark will appear.

To print the complete initiative, click the print icon 📝 on the Initiative List page.
To see what information is needed, click on the Initiative title. Click the Status tab. Provide the needed information in the appropriate section and resubmit by clicking the Manage checkbox.