BUDGET & HUMAN RESOURCES
STAFF RETREAT
FALL 2019

UofSC
Arts and Sciences
AGENDA

- Welcome (Pam Hayes)
- CAS Strategic Vision (Dean Lacy Ford)
- Budget Operations (Susan Klie)
- Grants Operations (Alysia Bridgman)
- Human Resources (LaTasha Robinson)
  - HCM Refresher (Teresa Limpalair, Central HR)
- Internal Communications (Elise Ahyi)
- Wrap-up
A Vibrant Learning Community
2019-2020 Strategic Vision

Arts and Sciences
STRATEGIC GOALS

● Faculty Excellence
● Student Academic Experience
● Diversity and Inclusion
● Community Engagement
● Instructional and Research Space
INVESTING IN FACULTY

Since July 1, 2016:

● New tenure-track faculty
  ● 61 Tenure-track faculty hired
● 15 Authorized searches for upcoming year
● 40 New non-tenure-track faculty hired
● Start-up packages
● Commitments fulfilled
ARTS & SCIENCES IMPACT

- 8,066 Undergraduate Majors
- Faculty teach 92% of the Carolina Core
- PhDs awarded:
  - 117 - AY18
  - 132 - AY19
DIVERSITY AND INCLUSION

- CAS Diversity Committee
- Search committee training (3 fall sessions)
- Teaching Towards Inclusive Excellence Certificate (led by CTE)
- Opportunity faculty hires
COMMUNITY ENGAGEMENT

- Expand on existing community outreach
- Design CAS initiatives that convey the value of our degrees and research
- Actively recruit students and their families
- Encourage faculty and student participation
ADVANCEMENT

- Communications and marketing
- Alumni relations
- Development
- Advocacy
INSTRUCTIONAL AND RESEARCH SPACE

- New Chemistry Teaching Labs
- LeConte upfit
- Relocation of Philosophy and WGST
- Facilities Revitalization Initiative
OUR PATH FORWARD
OUR APPROACH

● Think strategically
● Maintain a sustainable budget
● Focus on communication and engagement
● Creatively support students and faculty
● Enhance college-wide schedule coordination and classroom utilization
● Respond to organizational and incentive changes at the university level
BUDGET OPERATIONS TEAM

• Susan Klie, Director of Budget Operations
• Patty Brabham, Senior Budget Analyst
• Joya Caldwell, Financial Analyst
• Bob Ellis, Business Administration & Operations Mgr
• Wendy Roberts, Budget Analyst
• Rhonda Stephens, Business Administration & Operations Mgr
COMMITMENTS

• Reimbursement requests must include appropriate back-up (include GL to show expense has posted)
• Request reimbursement in a timely manner (30 days, except for end of fiscal year)
• Check commitment reports for end dates
• If an extension to the end date is required, the faculty member or business manager should send an email to the unit’s budget contact
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<th>Description</th>
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### Total Summary

- **Total Salary**: $1,250.00
- **Total Fringe**: $368.25
- **WC and UN**: $7.88
- **TOTAL**: $1,626.13

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### Total Summary

- **Total Salary**: $3,042.74
- **WC and UN**: $19.17
- **TOTAL**: $3,061.91

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### Arts and Sciences
HOW TO SEE IF A REIMBURSEMENT HAS POSTED

Finance Intranet
STARTUPS

• Starting in FY19, we created accounts for new faculty start-ups and frontloaded funds

• Any faculty who started before FY19 will still charge expenses to a department account and request reimbursement

• For expenses over $5,000, pre-approval is required

• If additional funds or an extension to the end date are required, the faculty member must send an email to the unit’s budget contact
BUDGET TRANSFERS, BUDGETING, AND REBUDGETING

• Budget transfers – please include appropriate documentation that indicates what the funds are for and to which unit they are going, and demonstrates authorization

• **Budgeting** – to budget funds from IITs, revenue and transfers in (these are not allocations or reallocations)

• Rebudgeting (reallocations) – to move budget from one account code to another
MEMOS

• Memos required for all food purchases on A, E or R funds
• Memos required for memberships, subscriptions and cell phones on all funds (including grants)
• Refer to USC Policies – i.e. BUSA 7.05 and payment matrix
PURCHASING

• Refer to USC *purchasing policies and procedures*

• When in doubt, ask in advance!
PAYROLL ACCOUNT CHANGES

• Use PARF to request payroll account changes (for faculty, students and staff)

• Send all communications about account changes to caspayrl@mailbox.sc.edu

• Changes may take a month or more to show in the GL

• For other student hire changes (i.e. change amount of pay or length of appointment), use Student Change Request and route accordingly
ODDS AND ENDS

• Fringe benefit expenses
  • Unemployment and Workers’ Comp

• Chartfields
  • Chartfield Request
  • Still send to Patty Brabham
  • Be sure to check Payroll box
  • Account changes (i.e. a faculty made request to extend a date on an ASPIRE grant), that request needs to be sent to the Controller’s office via Patty

• How to look up new funds/projects in Peoplesoft

• Conflict of Interest
  • Staff Conflict of Interest (COI) Disclosure System
OTHER TRAINING IDEAS

• Microsoft Excel “Bootcamp”
  • Including Budget Projection worksheet walkthrough
• How to navigate the Finance Intranet
• Others?
CONTACT INFORMATION

• Patty Brabham – brabhamp@mailbox.sc.edu
• Joya Caldwell - jecaldwe@mailbox.sc.edu
• Bob Ellis – ellisrl@mailbox.sc.edu
• Susan Klie – sklie@mailbox.sc.edu
• Wendy Roberts – robertwj@mailbox.sc.edu
• Rhonda Stephens – stepherw@mailbox.sc.edu
Q & A
GRANT OPERATIONS

Arts and Sciences
GRANTS OPERATIONS TEAM

• Alysia Bridgman, Director of Grant Operations
• Jan Miron, Grants Manager
• Mike Turner, Grants Manager
• TBD, Grants Coordinator
• Team Email: casgrant@mailbox.sc.edu
PRE-AWARD SERVICES

• External proposal preparation
• Solicitation review with Principal Investigator (PI)
• Budget development
• Collect and review subawardee budget input
• Proposal submission support
  • Internal systems (USCERA, Cayuse 424)
  • External/sponsors’ systems (Grants.gov, Fastlane, NIH Assist, etc.)
• Sponsored Awards Management approves all submissions
POST-AWARD SERVICES

• Monthly budget reports for grants management
• Quarterly reports of payroll and tuition expenditures
• Cost projections for PIs
• Policy and procedure compliance support for PIs
  • Rebudgeting
  • Extension requests
  • Understanding reporting requirements
• Grant Manager assignments included in handouts
## SAMPLE BUDGET REPORT

### USCSP Project Summary Report

**Primary Invest:** PI NAME  - 6/1/2018-5/31/2021  
**FOR INTERNAL USE ONLY**

**Department:** Department Name  
**Proj Desc:** Project Title

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<th>Budget Category</th>
<th>Budget $</th>
<th>Actual $</th>
<th>Current Bal $</th>
<th>Pre-Encumb $</th>
<th>Encumb $</th>
<th>Avail Bal $</th>
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Subtotal - Direct Costs: $357,042  
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INDIRECT COSTS

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TOTAL:

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Data As Of: 08/31/2019  
Run Date: 9/6/2019 3:57:51 PM
UPCOMING WORKSHOPS

• Grant Management for PIs – Finance Intranet
  Gambrell 150 (equipped with workstations; space is limited)
  • Friday, Oct. 18th 10:00 a.m.
  • Monday, Oct. 28th 10:00 a.m.
  • Tuesday, Oct. 29th 2:00 p.m.

• Future workshop topics and dates TBD
INTERNAL WEBSITE: NEW GRANTS PAGE

• Contact information by topic and unit
• Frequently Asked Questions
  • Budget template
  • Rates (fringe benefits and indirect costs)
  • Risk account requests
  • Link to sales tax exemption form
  • Link to sample data management plans
  • Link to site for Conflict of Interest annual disclosures
Q & A
HUMAN RESOURCES
COLLEGE OF ARTS & SCIENCES
OFFICE OF HUMAN RESOURCES TEAM

• LaTasha Robinson, Director: casdhr1@mailbox.sc.edu
• Stephanie Marrs, Associate Director: casdhr2@mailbox.sc.edu
• Betty Helms, Human Resources Manager: casdhr3@mailbox.sc.edu
• Sarah Gottshall, Human Resources Associate: casdhr4@mailbox.sc.edu
• Lachandra Wood, Human Resources Associate: casdhr5@mailbox.sc.edu
TYPES OF POSITIONS:

• **Full-time Equivalent (FTE)** – These positions utilize the State of South Carolina’s Job Classification and Compensation System, are state funded, and if classified staff, receive an annual review under the Employee Performance Management System (EPMS).

• **Temporary** - A full-time or part-time non-FTE position created for a period of time not to exceed one year. This includes adjunct/temporary faculty, salaried temps, and hourly temps.

• **Research Grant Position (RGP)** - A non-FTE position specified in and funded by a federal grant, public charity grant, private foundation grant or research grant under the Life Sciences Act.

• **Time-Limited Position (TL)** - A non-FTE position established to perform work directly associated with a time-limited project. Time-limited project positions may be supported by Federal, State, or Other funds. Requires approval from the State Office of Human Resources.

• **Affiliate Position** – Non-compensated individuals who, by virtue of their profession, expertise, or unique qualifications will make a significant contribution to the University, its campuses, divisions, colleges/schools, and/or departments. Affiliate appointments may be made in three categories: Academic, Non-Academic, or Student.
Full-time Equivalent (FTE):

FTE Staff:
- Paid from state funds
- Status can be Exempt or Non-Exempt *(the Office of Classification and Compensation will determine this status based on guidelines of the Fair Labor Standards Act (FLSA))*
- Position description **required**
- Job advertisement on USC Jobs website IS REQUIRED - **must be posted for a minimum of 5 business days**.
- Will have an annual EPMS Review

FTE Faculty
- Paid from state funds
- Position description **not required**
- Approved Academic Position Request Form required before the search can be opened
- Job advertisement on USC Jobs website IS REQUIRED - **must be posted for a minimum of 5 business days**
TEMPORARY HOURLY:

• Non-FTE position
• Can be paid from grant or state funds
• Non-Exempt status only - employee submits weekly timesheets in iTAMS
• Position description **not required**
• Job advertisement on USC Jobs website IS **NOT REQUIRED**
• Employee required to take the mandatory 15-day break-in-service after twelve (12) months of continuous employment
• No AL/SL allowed
TEMPORARY SALARIED:

- Non-FTE position
- **Can be paid from** grant or state funds
- Exempt status **only**
- Position description **required**
- Job advertisement on USC Jobs website IS **NOT** REQUIRED
- Employee required to take the mandatory 15-day break-in-service after twelve (12) months of continuous employment
- No AL/SL allowed
RESEARCH GRANT POSITION (RGP):

- Non-FTE position established to support research activities.

- **Paid from Grant Funds**

- Exempt/Non-Exempt *(the Office of Classification and Compensation will determine this status based on guidelines of the Fair Labor Standards Act (FLSA))*

- Salaried **only**

- Position description **required**

- Job advertisement on USC Jobs website IS REQUIRED - **must be posted for a minimum of 5 business days.**

- Continuous employment/ **no** mandatory fifteen-day break-in-service is required

- Employee can receive annual leave and/or sick leave (contingent on terms of the on grant)
TIME-LIMITED (TL):

• Non-FTE position established to perform work directly associated with a time-limited project.
• **Paid from A or E funds**
• Exempt/Non-Exempt (as determined by FLSA guidelines) – Salaried **only**
• Position description **required** and must be submitted with the required time-limited documents
• Job advertisement on USC Jobs website IS REQUIRED - **must be posted for a minimum of 5 business days.**
• Continuous employment/ **no** mandatory fifteen-day break-in-service is required
• Can allow annual leave and/or sick leave
• **Please note:** TL positions must also be approved by State OHR (will require additional documentation)
UNIVERSITY AFFILIATE

• Not paid by funds from the University

The Unit is required to generate and send an affiliate appointment letter to the candidate for acceptance. Once accepted, the letter, along with the affiliate form will need to be initiated by the Unit in HCM.

*If the appointment will be as an academic affiliate, a transcript is required.*
WORKFLOW OF HR ACTIONS
(AFTER RECEIVING APPROVAL FOR THE POSITION)

Position Descriptions are required for all FTE classified and unclassified staff positions, temporary salaried positions, research grant positions, and time-limited positions. The PD must be created or modified prior to opening a search.

- Unit initiate action and submit to the College for review.
- College reviews and send to Classification and Compensation for review.
- Classification and Compensation approve and send notice of approval to search.

Job Posting

- Unit initiate action and submit to the College for review.
- College reviews and send to the Talent Acquisitions Office for review.
- Talent Acquisitions review and send notice that the job is posted.
Faculty FTE Actions

- **Academic Position Request/FTE Form** - Unit → College → Provost
  Budget → Provost → College → Unit

- **Job Ad** – cannot be approved in People Admin until we have received the approved FTE Form back as the Unit will have to upload the approved form to the requisition.

- **Posting to USC Jobs** - Unit → College → Provost → HR

- **Making an Offer** – Unit must move all applicants through the workflow and submit a request to make offer to the College’s HR Office in People Admin for approval. *This is not the same as the request to make offer submitted to the Dean.*
PEOPLEADMIN REMINDERS

- Review employment applications before submitting hiring proposal;
- EMPLID must be included in the HP if a rehire – look up in HCM, if not in HCM contact HR or Payroll
- Transfer – must have transfer form completed and attach to hiring proposal
- When hiring it is the hiring unit’s responsibility to know if new hire, rehire less than 1 year, rehire greater than 1 year, currently employed in another position at USC or with another state agency (what type of position they are currently employed in)
- EMPLID in Onboarding is **NOT REQUIRED**;
- Background Checks – Full account chart string and both email addresses;
- Read the writing under boxes in the hiring proposal;
- Include supervisor’s position number (this information can be found in HCM);
PEOPLEADMIN REMINDERS, CONT.

• TEMPS mandatory 15-day break after 1 year of employment;
• TFACs – Exempt/12 months (unless a true 9-month TFAC or primary position is non-exempt)
• TFACs – make sure ACA document is not blank when you attach to hiring proposal (check all documents before submitting hiring proposal)
• TFAC offer letters must include the course they are teaching;
• OFFER LETTERS – Unit HR contact must proofread & correct any errors
  *remove names from “job title”
  *remove extra $ 
  *must be white background – no photographs accepted by HR
  *OIS verbiage required when not a US citizen
ADMIN ERROR MEMO REQUIRED FOR ALL LATE ACTIONS

Must be attached as a “supporting document” to any action that is submitted on or after the effective date. This includes hiring proposals in People Admin and actions in HCM. This memo should explain the reason for lateness of the action as well as detail the steps being taken internally to eliminate late submissions.
Administrative Planning Calendar

The College of Arts and Sciences Planning Calendar contains dates and deadlines for this academic year.

https://www.sc.edu/study/colleges_schools/artsandsciences/inter\nal/for_faculty_staff/calendar.php?search=Human\%20Resources
Do you have any employees who:

- will be starting January 1, 2020?
- will be terminating their employment December 2019?
- who had a sabbatical leave for Fall 2019?
- who will have a sabbatical leave for Spring 2020?
- who was reviewed during the 2019-2020 Mid-Year Cycle and will be promoted January 1, 2020?
- have any other end dates of December 2019 or effective dates in January 2020?
Tenure and Promotion

Important Upcoming Deadlines Due to the Dean’s Office

- **October 25, 2019** – Unit Head send a list of faculty who will be considered during the 2020-2021 Mid-Year Cycle
- **January 10, 2020** – All Third Year Review Files to Dean’s Office
- **February 17, 2020** – Post-tenure Review Committee Report and Department Chair/School Director’s Recommendation to Dean
- **March 2, 2020** – 2020-2021 Mid-Year Cycle TP Files to Dean via Blackboard and one hard copy file, along with supplemental materials

**WARNING:**
DEADLINES ARE CLOSER THAN THEY APPEAR!
HELPFUL LINKS AND RESOURCES
University of SC Division of Human Resources
http://sc.edu/about/offices_and_divisions/human_resources/

**People Admin System** (updating position descriptions, posting job ads, hiring temporary and FTE employees, and onboarding of new employees).
https://www.sc.edu/about/offices_and_divisions/human_resources/toolbox/peopleadmin/index.php

**HR/Payroll System (HCM)**
https://www.sc.edu/about/offices_and_divisions/human_resources_and_payroll_project/internal/index.php

**HR Toolbox (forms and various useful tools and info)**
http://sc.edu/about/offices_and_divisions/human_resources/toolbox/index.php
HR Policies
http://sc.edu/about/offices_and_divisions/human_resources/policy_procedure/index.php

Professional Development
http://sc.edu/about/offices_and_divisions/human_resources/professional_development/index.php

Manager’s Role (lots of useful info including how to create a position description, hiring, onboarding, etc.)
http://sc.edu/about/offices_and_divisions/human_resources/managers/index.php

International Scholars (employees/affiliates who are non-US Citizens)
https://www.sc.edu/about/offices_and_divisions/human_resources/international_scholars/index.php

Faculty Reviews (Tenure and Promotion, Third Year Review, and Post Tenure Review)
http://www.sc.edu/about/offices_and_divisions/provost/faculty/tenure/index.php
HCM REFRESHER SESSION
W/ TERESA LIMPALAIR,
HR SYSTEMS TRAINER
Q & A
INTERNAL COMMUNICATIONS TEAM

• Elise Ahyi
  Assistant Dean for Academic Policy, Planning & Administration

• Geniese James
  Director of Information Resources

• Dean's Office
  Derlene Lowder, Chief of Staff and Assistant Dean
  Pam Hayes, Deputy Chief of Staff
  Sarah Livingston, Assistant to the Dean
STRATEGIES

• Efficiency and effectiveness (solve the problem)
• Role-based solutions
• Technology (tools and resources)
• Central Administration vs College balance
DEAN'S OFFICE: UNIT CONTACTS

• New, updated contact list by unit
  go.sc.edu/cascontacts
• Preferred method of contact: email
• Reasonable expected response times by type of action
• Unit follow-up when response not received
  (within 3-5 days in most cases)
RESOURCE EMAIL ACCOUNTS

• Managed by Dean's Office staff
• Efficiency and shared responsibility
  (team member backup, record of communications)
• Same expected level of response and issue resolution
• Two types of accounts: College-wide communication vs. transactional/questions
COMMUNICATIONS EMAIL ACCOUNTS

- **CASDEAN@mailbox.sc.edu** (Sarah Livingston)
  LKF memos to chairs/directors and all general Office of the Dean announcements

- **CASHRADM @mailbox.sc.edu** (LaTasha Robinson)
  Announcements and memos sent to chairs/directors and unit HR staff

- **CASBUDGT @mailbox.sc.edu** (Susan Klie)
  Announcements and memos sent to chairs/directors and unit budget staff

*Effective 10/14:  Auto-reply messages for all above accounts*
TRANSACTIONAL EMAIL ACCOUNTS

• Managed by various Dean's Office teams
• go.sc.edu/cascontacts
  • Budget
  • Grants
  • HR
• For all other departments: team websites
CAS INTERNAL WEBSITE

• External-facing site vs. MyCAS
go.sc.edu/mycas
• Audience: CAS chairs/directors, staff, faculty, students
• Online planning calendar and document library
• New short links for key sites (go.sc.edu/----------)
www.sc.edu/artsandsciences
CAS INTERNAL WEBSITE

COMING SOON

• News and announcements
• HR/Budget Updates
• Dean's Office team sites: staff listings, how tos, policies and procedures
• Interactive, online forms
WEBSITE SHORTLINKS

www.sc.edu/artsandsciences

go.sc.edu/mycas

go.sc.edu/casfacstaff

go.sc.edu/cascalendar

go.sc.edu/cascontacts
Q & A
THANK YOU!
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