

# University of Houston Clear Lake

## Business Administrator Meeting – Recap Notes

February 10, 2023, at 8:30 am

Recreation and Wellness Center, Room 264

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*Attendees: Mark Denney, Krista Buckminster, Darron Johnson, Rich Stebbins, Robin Shannon, April Felan-Butler, Juan Olguin, Debbie Carpenter, Rosie Pineda, Nicole Lenderman, Laura Molina-Guzman, Greg Haines, DeAngel Bonilla, Michelina Johnson, Cindy Saltzman, Renee Chavez, Abby Varela, Miriam Rouziek, Lea Black, and Faron Samford.*

### **Krista called the meeting to order right at 8:30 am**

#### **Krista:** Introduction

- Welcome to our team:
  - Nicole Lenderman - College of Science and Engineering, College Business Administrator
  - Renee Chavez - Faculty Affairs Coordinator (also Provost Office Dept Asst)

#### **Agenda Items:**

##### **1. Mark Denney (VPAF):**

Mark thanked the Chief Business admins for completing the Dept Assistant Excel sheets earlier this week. Further action will need to be continued to determine business processes and training. We will need to focus on what will need to be completed in this phase of the process.

*Gift cards* – there was an issue with the purchase of \$50 gift cards for the COVID vaccine initiative. We had a total of 11,000 students and fac/staff combined. UHCL did not have enough, many of the staff identified as vaccinated, and a lot of students did not get the shot (thus not qualifying for the incentive). We had over 2000 gift cards to figure out how to distribute and as time passed, the cards were getting funds deducted after a period of inactivity. AP decided to cash in the gift cards and use these funds with an approved vendor to purchase UHCL promotional items to give out to students and staff. Kudos to Accounts Payable for making this call.

UHCL is trying to determine a policy to follow regarding the completion of an Exhibit B form for staff and faculty members who receive gift cards to claim this as taxable income. Until there is a system-wide policy, UHCL is going to follow in the footsteps in the other UH campuses.

##### **2. DeAngel Bonilla (Chief Business Administrator, Academic Affairs):**

###### *Topic #1: Business Admin Workflow concerns*

Academic Affairs met recently and they had concerns with the workflow. The person who prepares the documentation should be the p-card holder, not the business admins to track all the expenses and receipts. We need to differentiate between OIT and what's owned by departments. Vouchers, reqs, contracts – the dept assistant handles the data entry of voucher

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entries. We want to leave room for other roles in the process. For some of the roles, we would like to come up with a proposed change. For the financial reports, the prep of supporting Hyperion reports, will the Dept Assts get access? Krista will check and follow up on that, but primarily Business Admins have Hyperion Access. The job approver and hiring manager is the Business Administrator, not the dept assistant.

ePRFS – Laura Molina-Guzman: the job description for Dept Assistants do not mention being a P-Card holder or completing payroll forms. Job descriptions need to be updated and they do not make hiring decisions.

Abby Varela – Admin assistants used to be dept secretaries. There may need to be an overhaul of re-working job titles. CBAs and DBAs determine the payment amount.

Lea Black – Mark is initiating these conversations to firm up and determine the roles, and job functions. Lea suggested a working follow-up meeting to help get this all cleared up. Cindy Saltzman – also agreed about setting up the meeting. We need to meet with all the essential departments (HR, ePRFs, GCMS, etc.). Designate time to talk about all of these items (ex. 20 mins for PCard, 20 mins for HR, etc.) before meeting with Mark.

Topic #2: Reactivation of Inactivated positions (discussion with Human Resources)

Academic Affairs is being requested, by Krista, to utilize inactive positions instead of creating new positions. DeAngel is okay with this, but she wants to explore having the ability to reactivate positions ourselves, without requesting each reactivation from Abby.

Michelina Johnson – should we activate them now? Krista – when you are looking to hire a new position, check vacancies and inactive positions. Use the inactive positions instead of creating new ones. We don't need to create new ones that already exist. Now that COVID is over, this will help keep position maintenance cleaner. Abby agreed to re-activate them but said it depends on when a new job code is applied.

### 3. Abby Varela (Human Resources)

*Topic: Faculty Reporting Lines*

- In short, HSH has submitted several reports to manager changes and they are trying to have employees report to an employee's empl record 1 position as Department Chair.

Some position numbers have several incumbents. Peoplesoft is not smart enough and does not recognize the multiple Department chairs.

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- What are the other colleges doing regarding reporting lines? Abby is hesitant to approve these requests. They should be at an empl record 0. Additionally, it presents Payroll challenges as well.

In one of the other colleges, they recommend starting with empl record 0. Its not an issue on the budget side, but it can be on the TRAM side. **Abby plans to reach out to other UH Campuses to see what they are doing.** Greg Haines suggested the empl record 0 and confirmed that it was working well for HSH.

Don't create new cost centers until you see what the program cost structures will look like.

**Cindy suggested having an agenda item for the next meeting to discuss the creation of cost centers and what is currently on the drawing board moving forward.**

DeAngel asked Abby about Department Chair and Admin posting job codes. The Admin position is a temporary, short-term position, but there was also a long-term Admin position. Abby suggested the use of the Admin Comp position title.

#### **4. Laura Molina-Guzman** (CBA, College of Education):

Topic: Clarification on **SCR** voucher approval procedures (correction: this agenda item was about regular vouchers, not SCR vouchers).

Laura is having her new hires go through the voucher (not SCR) process. Example: a new hire in COE just completed an SCR voucher for parking fees and routed it for approval. All areas approved except for Accounts Payable – they were denied due to no signature on the cover sheet. I have reviewed the Parking SCR voucher procedures, SCR Voucher procedures on the PeopleSoft Finance Access webpage, and regular voucher entry procedures. None indicate signature on the cover sheet required except if a reimbursement – payee and supervisor must sign – or if utilizing Provost funds and CBA/DBA of the originating department must sign. The general ledger instructions on the AP Peoplesoft training website back up what Laura mentioned in the meeting. (<https://www.uhcl.edu/about/administrative-offices/business-operations/peoplesoft-finance/documents/apvoucherworkflow-additional-information-final.pdf>)

**Rosie will speak with Dr. Sherry Hawn to determine if the cost center manager needed to sign the voucher because the procedures do not state that.**

#### **5. Cindy Saltzman** (DBA, Student Affairs): Strategic Hiring Process:

Topic: PeopleSoft Strategic Hiring Committee workflow routing sequence for ePRFs for new hires and re-hires. Dr Powellson has mentioned that the process is going to change very soon.

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Dr. Walker wants to make this change as soon as possible. Cindy wants to know what to expect with the new hiring action. DeAngel: it will depend on the department. Is there a change afoot?

Questions for HR: What is the timing to turn off / update this routing? What is the workaround until the workflow sequence is turned off?

Abby: HR is working with HRIS to dismantle what was created. The changes are not a reality yet and we cannot give an exact date or timeframe as to when the changes will occur. Dr. Walker has initiated these conversations with UHS to help push this along. HR and HRIS are hoping to get this started very soon but Abby recommends departments continue doing what they are currently doing. We are in a tough spot right now but hang in there until we can get it all resolved. We are at the mercy of short-staffing and new hires at HRIS. Once we reach a solution, it will need to be tested before it is officially rolled out.

Cindy suggests the creation of a position of a designated staff member to handle all HRIS PeopleSoft concerns and that this should be made a priority. We should have a functional person who reports all issues to UH, instead of just a liaison through HR or another department.

### Conclusion:

Krista shared the slide with the list of upcoming Planning & Budget events, as follows:

#### Save the Dates:

##### **-Budget Development (CBAs and DBAs only):**

~~Wednesday, February 15<sup>th</sup> at 3 pm 4:30 pm (Bayou 1311)~~

Friday, February 24th, 9 am-10 am (Bayou Building, Room 1439)

##### **-Hyperion Reports Training:**

Tuesday, February 28at 10 am-12 pm (HR Training Room)

##### **-Next Business Administrator Meeting date:**

Friday, March 10 at 10 am (~~Location TBD~~)-(Rec and Wellness Center, Room 264)

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### **Action Items:**

- Schedule a meeting with CBAs and DBAs to discuss business admin workflow processes to discuss issues and concerns from the listing given out at the January CBA/DBA Meeting.
- DeAngel's question: for the financial reports and the preparation of supporting Hyperion reports, will the Department Assistants get access? Krista will check and follow up on that, but primarily the CBAs and DBAs have Hyperion Access.
- RE: Abby's agenda item - Cindy suggested having an agenda item for the next meeting to discuss the creation of cost centers and what is currently on the drawing board moving forward.
- Abby plans to reach out to other UH Campuses to see what they are doing about Faculty Reporting Lines
- RE: Laura's agenda item - Rosie will speak with Dr. Sherry Hawn to determine if the cost center manager needed to sign the voucher because the procedures do not state that.

**The meeting concluded at 9:49 am.**