

Business Administrator Meeting – Recap Notes
Tuesday, June 13th at 9:30 – 11 a.m.

Attendees: Deja Sero, Mark Denney, Krista Buckminster, Darron Johnson, Robin Shannon, Rich Stebbins, April Felan-Butler, Abby Varela, Juan Olguin, Cindy Saltzman, DeAngel Bonilla, Debbie Carpenter, Rosie Pineda, Melissa A. Hernandez, Nicole Lenderman, Lea Black, Michelina Johnson, Greg Haines, Mila Bautista, Thinh Dang, Cindy Lamb, Tanjina Rahman, Kathy Mullikin, Faron Samford, Rhonda Warner, Laura Molina-Guzman, and Yolanda Edmond.

The meeting was called to order at 9:32 am.

1. Introduction

- Deja asked if there was any new business we needed to re-visit from the previous meeting, held in April 2023. Nobody brought up any concerns, so we went ahead into the agenda items.

2. Agenda Items

a. **Abby Varela - Student Employment Pay Rates (Proposal and Discussion)**

- Abby is recommending changes to the hourly pay rate for students and possibly inactivating some job codes. She presented her proposed changes and asked for feedback. This topic started as a discussion about monthly pay rates with DeAngel Bonilla. Some student job codes are currently not being utilized. Departments want to pay these rates. Abby has spoken to financial aid and they are not being used. The ones outside of the red box are not being used (on the visual). Keep the federal student aid group.
- **Question:** If we transfer to student tech titles, are we ok with that? Or do we want student assistant titles? Keep instructional assistant – College of Business uses it the most. Student Hourly is used in Parking and Transportation.
- Monthly research assistant: Keep the hourly basis; several are in multiple roles and needs to stay.
- Moving to student tech: Keep the pay rate the same.
- Student Affairs: Student Assistant is more of their trend.
- **Discussion: If we transfer Student Tech to Student Assistant job titles, is everyone okay with that? We need to agree to make the change. If we change to Student Assistant, we would need to change the job codes.**
- **April: gather up questions, Abby will decide and make the change, and send out the final decision to the entire group for 9/1. April will send questions before Friday, 6/16.**
- Deja: feels that the hiring manager can call their student worker title as they see fit; it needs to be simplified for HR; have one student job title and code.

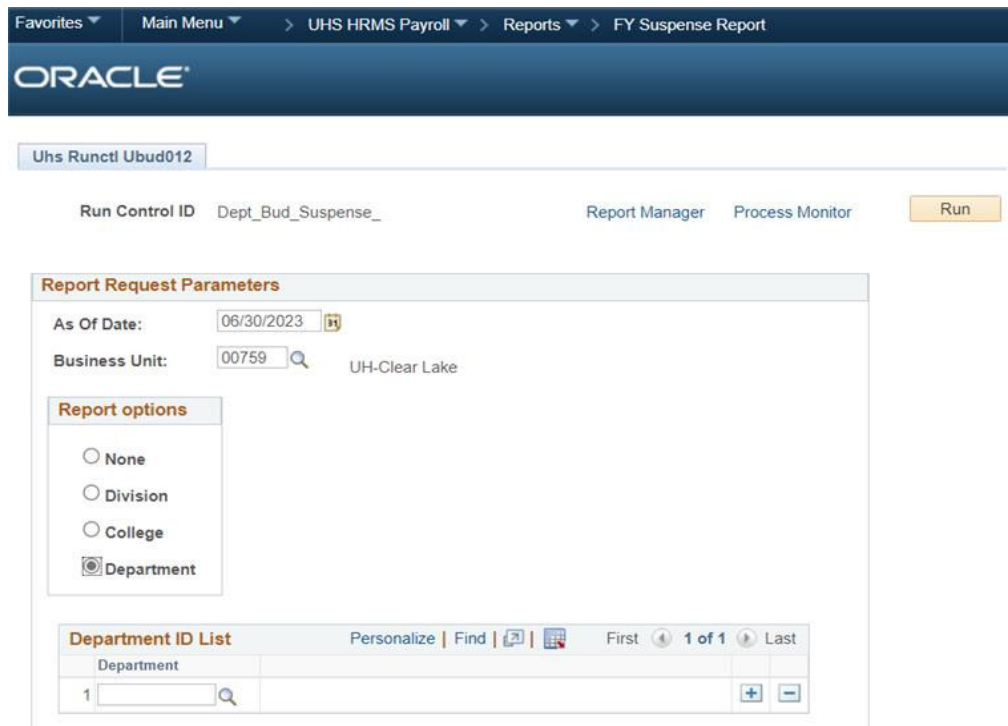
Business Administrator Meeting – Recap Notes

Tuesday, June 13th at 9:30 – 11 a.m.

- Student workers should not be paid more than some of our benefits-eligible staff members (custodians, etc.)
 - Abby will speak with Holly Nolan about financial aid for instructional students
 - Deja needs to calculate budget for FTE and market rate for positions (for Budget) with Abby
 - When is it acceptable to hire part-time exempt and part-time non-exempt? (Greg Haines)
 - Set up students as vendors? (Laura) There might be tax issues involved (Debbie)
 - Monthly pay rates for students?
 - June 16th-23rd: Abby will be out on vacation, so there will be back-ups for HRIS and ePRFs while she is out.
- b. **Mila Bautista** - [A&F FY23 End of Year Calendar](#)
- Mila sent the calendar via email and had it uploaded to the General Accounting website. Please share with the respective departments.
 - Think Dang (GA) shared important dates on the Year-End Calendar. Think is responsible for re-allocating the correct cost centers; please do PeopleSoft paperwork to get that properly resolved.
 - *GL Closing (Year-End)*: If your area puts an entry in the workflow, please review it and approve it in the workflow as soon as possible. In this case, if you look at July this year, July 4th is a Tuesday, so July 5th, Wednesday is a second working day look entry for June and the deadline is 12 noon. Please look into it and quickly enter it because the GL flow is for all 4 campuses.
 - *Payroll*: Think runs the cost center for payroll suspense. He needs to have a paycheck and position, and if there is a problem, employees still get a paycheck on time and the correct amount.
 - *Cost Center Reallocation*: to reallocate, do the paperwork to fix it in PeopleSoft so that it would reflect your current correct cost center, correct position, & correct fiscal year.
 - There will be two Payroll reallocation deadlines for FY23: August 21st and September 11th. (both before 12 pm noon). Think will send a reminder email a few weeks before these deadlines.

Business Administrator Meeting – Recap Notes
Tuesday, June 13th at 9:30 – 11 a.m.

- Think also mentioned the Payroll suspense report. Lea shared a link with instructions on how to complete this in Teams: [Black, Lea J: PAYROLL SUSPENSE](#) (Posted in DBA_CBA / General at Tuesday, June 13, 2023 10:22:48 AM)



The screenshot shows the Oracle HRMS Payroll Reports interface. The breadcrumb trail is: Favorites > Main Menu > UHS HRMS Payroll > Reports > FY Suspense Report. The Oracle logo is visible at the top. Below the breadcrumb trail, there is a search bar containing 'Uhs Runctl Ubud012'. The main interface has a 'Run Control ID' field with 'Dept_Bud_Suspense_' and buttons for 'Report Manager', 'Process Monitor', and 'Run'. The 'Report Request Parameters' section includes 'As Of Date' set to 06/30/2023 and 'Business Unit' set to 00759 (UH-Clear Lake). The 'Report options' section has radio buttons for 'None', 'Division', 'College', and 'Department' (which is selected). Below this is a 'Department ID List' table with a search bar and navigation controls.

Department
1

- Tanjina: Dharmik handles Asset Management. Physical inventory will be due July 31st (Dharmik's preference). If any changes on the Department Property custodian form, please let him know immediately to plan ahead. Property custodian forms and off-campus forms are due on August 30th, 2023 for FY 2024 via DocuSign.
- HEERF will be ending on June 30th. Last journal entries will need to be completed before June closing deadline. All encumbrances should be released and invoices should be paid. Departments have already been notified, but a reminder will be sent out.
- PeopleSoft Finance 998 soft close on September 22nd: please, no entries should be made by departments during this time and please do not put this off. Cooperation is greatly appreciated.

Business Administrator Meeting – Recap Notes
Tuesday, June 13th at 9:30 – 11 a.m.

c. **Rosie Pineda** - For Accounts Payable, a reminder to Departments:

- Rosie mentioned that Melissa has been working a lot with the Concur project and more recently, the Celonis project. Celonis is a new software application at all UH campuses that catches errors, duplicate invoices, past due invoices, and etc. One thing we are being asked is for vendor credits. Celonis will be contacting C/DBAs in either July or August to complete any loose ends. Celonis is scheduled for implementation at the beginning of FY24.

For Vendor credits less than \$500, the departments will need to contact applicable vendors to request refunds.

For Vendor credits \$500 or more, the departments will need to create a credit vouchers in the system (effective 05/01/23).

Celonis will send an e-mail to the appropriate voucher creator in July and August notifying that they have pending credit vouchers.

At the Fiscal year end, unused credit vouchers will need to be closed or deleted

- **Upcoming Concur Trainings:**

- 06/15/23 – 2:00-4:00PM – Garden Room

- 06/27/23 – 2:00-4:00PM – SSCB 3311

- 06/29/23 – 2:00-4:00PM – SSCB 3311

- These training sessions will not be a click by click training, but rather more informative overviews of what to expect with Concur and an opportunity to ask any questions that staff members may have. In addition to the training dates listed on the agenda, there will also be a Concur training session for Faculty on June 23rd from 2-4 pm in the Garden Room.
- The reimbursement process is expected to be faster with Concur. We will have access to the Concur mobile app, Trip It, and Expense it. We will be able to take pictures of receipts and upload to the app, but Melissa still highly recommends saving the actual receipts until we get more used to them.
- There will be a designated email address for all Concur-related concerns. It is likely that a lot of questions will come up once Concur is implemented. Rosie asked everyone to utilize email instead of phone calls due to their limited staff available.

d. **Deja Sero – Budget Introduction Meetings with all Newly-Hired Managers (Proposal)**

- Recently had a very successful 1-hour introductory meeting with the Interim Director of the Neumann Library. In this meeting, they covered a lot of pertinent information and they had a very good conversation about everything budget-related at UHCL and what to expect. As a result, Deja came up with the idea to meet with all newly-hired UHCL managers within the first 30 days of hire. Deja will submit this question to Abby when we collect the feedback. This has resulted in deeper-level conversations and higher-level thinking with new managers.

Business Administrator Meeting – Recap Notes

Tuesday, June 13th at 9:30 – 11 a.m.

- Deja is seeking feedback on how we would be able to be notified of who those would be and get those set up and whether or not you would like to make this a joint meeting.
- Managers will be much more successful from the get-go if we had that conversation in those first 30 days and then they'll be able to connect a lot of pieces going forward.
- Mark Denney: the next step is to get HR involved and get the position numbers for all the manager positions that are filled. We will develop an onboarding matrix and the new hires will be given a list of trainings to complete. HR is already working on a mandatory ASCEND training for all managers. All campus Vice Presidents have agreed to support the mandatory training for managers. Mark will need to go through all of the Department org charts and determine who are the management positions and who will need the training.
- Deja was also going to introduce Luisa Gallegos, our new Budget Analyst III, but she is out sick for a few days. **Luisa plans to attend the July C/DBA meeting and she will present all of the projects that she has been working on for the Planning and Budget Office.**
- Lastly, Deja informed all of the meeting attendees that UHCL will present Merit to the Chancellor on June 24th. If the Chancellor approves, we will know whether or not we can do Merit in August.

The meeting concluded at 10:47 am.