



**First Fridays**  
with the  
**University**  
**Budget Office**

**UNT**<sup>®</sup>

UNIVERSITY  
OF NORTH TEXAS<sup>®</sup>

December, 2018

**EST. 1890**

# AGENDA

- Icebreaker
- UNT System Chief Human Capital Officer
- Annual Inventory Process
- UNT Sam's Club Membership
- ABA Updates
- General Announcements

# UNT System

**Barbara Abercrombie**

Chief Human Capital Officer

# Q&A with Barbara Abercrombie

## Campus Questions

Is it possible to offer training to administrative staff that focuses on how to hire a new full-time employee? The only training currently offered is how to process the I-9. As you can imagine this gap in training has caused lots of frustration for our admins and unnecessarily long time to hire an employee due to the back and forth with Human Resources. What are your thoughts?

ANSWER: Human Resources offers a learning course entitled “Hiring Responsibilities”, which is offered on a regular basis as part of the Supervisory Building Blocks curriculum. The course has been offered over the last couple of years and covers pertinent information regarding the employment process. The next session is on Thursday, January 10<sup>th</sup>, and you can enroll through the Learning Portal (session code HR16-0033).

# Q&A with Barbara Abercrombie

## Campus Questions

What does excellent customer service look like in the HR office?

ANSWER: Excellent customer service means being available, knowledgeable, and responsive to you, our customers. It also means providing you accurate, reliable and consistent information. While it does not mean always saying 'yes', it does mean working with you to find viable solutions.

# Q&A with Barbara Abercrombie

## Campus Questions

There has been talk on campus that this is the last year UNT will be closed for Winter Break. Is that fact or fiction?

ANSWER: Fiction. Holidays are officially designated by the UNT System Board of Regents. Schedules have been approved through FY19, which include Winter Break, and are posted on the [UNT System website](#).

# Q&A with Barbara Abercrombie

## Campus Questions

What steps is HR taking to improve their data?

ANSWER: HR is currently engaged in a HR Data Quality project to review our data to ensure its accuracy and reporting consistency and determine the appropriate access to end users. This project, which is comprised of multiple smaller projects, is expected to be completed by the end of the fiscal year. We want to make sure the data is accurate, reliable and consistent. What we have learned so far is that the data is not all 'bad'; instead, it is more misunderstood. We ask that if there are data needs, those needs should be addressed to our HRIS team at [HRIS@untsystem.edu](mailto:HRIS@untsystem.edu).

# Q&A with Barbara Abercrombie

## Campus Questions

Several positions on campus experience a conflict between what they actually do day-to-day and what is listed on their UPO-31. Several employees' feels squeezed. If their boss updates their UPO-31 to match their duties then that would trigger a reclassification and more money, which the boss says they don't have to give. There was a big initiative to reclass positions last year but some were missed. What advice would you give those impacted employees?

**ANSWER:** Supervisors and employees are encouraged to review the job responsibilities and goals documented on the UPO-31 annually, usually during the performance evaluation discussion. The UPO-31 should be an accurate reflection of the expectations and responsibilities of the position, and can be modified by the supervisor. The job descriptions, which are linked through the pay plan, are not designed to list every single duty, so there may be some variance from the UPO-31 document. It is up to each department to evaluate positions each year and determine which may warrant a request for reclassification during the university's annual open reclassification window. Changes in classification of a filled position are not permissible under the university's salary administration procedures. If an employee feels that his or her position is inappropriately classified, or the UPO-31 does not accurately reflect the responsibilities, he or she should communicate the concerns to the immediate supervisor.



# Q&A with Barbara Abercrombie

## Campus Questions

The annual staff evaluation document is so lengthy that it is largely meaningless. Will the document be revised in the near future?

ANSWER: YES. The plan is to have an online evaluation system by the next evaluation cycle during FY20.

# Q&A with Barbara Abercrombie

## Campus Questions

What steps are being taken to ensure increased diversity within the Faculty, Staff and Administration at all UNT System locations?

ANSWER: The very first step is to get an effective leader in this critically important area. Pleased to announce that we just hired our Director of Equity, Diversity and Inclusion who will work very closely with Vice President Woodard in the Office of Equity and Diversity. Her name is Wanda Boyd and she began working on Monday, December 10<sup>th</sup>.

# Q&A with Barbara Abercrombie

## Campus Questions

Why can't colleges have different level coordinators? Only System or other departments are allowed to have administrative coordinators that are of different levels.

**ANSWER:** Each component of the UNT System operates under its own pay plan and job structure. The UNT pay plan has two levels of administrative coordinators, two levels of administrative specialists, and executive assistants. The campus-wide panel of Subject Matter Experts evaluated administrative positions in all areas across campus as part of the Job Evaluation and Grading Project, and identified the current structure as the best practice for the institution. Variances in levels should reflect substantial differences in job responsibilities, which was not always present in the prior pay plan which had 4 levels of each title. In the current pay plan, there is also some alignment with the level of individual supported by the administrative coordinator. For example, the Senior Administrative Coordinator supports a Dean, Director or Assistant/Associate Vice President. This is not unique to the UNT System.

# Q&A with Barbara Abercrombie

## Campus Questions

What's your perspective of training across the components? Will there be a centralized approach to training? Subsequently, this would involve tracking of mandatory compliance related training at UNT. What is your vision and plan for addressing this matter?

**ANSWER:** Yes, it should be centralized. We recently implemented Enterprise Learning Management in EIS and heard there may be some issues. However, no one has spoken to Barbara yet. She plans to reach out to campus leadership to learn more.

# Q&A with Barbara Abercrombie

## Campus Questions

When it comes to answering questions there seem to be a lot of new HR folks. Please have them read the policy and be able to back up the information they give us in writing (not just on the phone).

Along those same lines, it's frustrating to contact HR and not get to the correct person but also not have the person who did get your call know who to send you to. Is there a way to do some cross-training, have a generalist answer calls first or at least have a sheet of paper that everyone has in front of them with descriptions of what everyone else does so they know who to send people to for assistance?

**ANSWER:** Yes, there were many vacancies (60% at one time this year) and we are trying to staff up. In the meantime, you may reach out to your assigned representative, or contact Campus HR at x2281 to ensure that inquiries are responded to and routed appropriately. If you encounter a specific issue, please notify the Campus HR Director, Katy McDaniel, and she will have the opportunity to review internal processes to adequately respond. Asking for grace and space to make this better for everyone.

# Q&A with Barbara Abercrombie

## Campus Questions

We were told that only people with certain job titles could have offices with doors. That offices/offices with doors/cubicles are determined by someone's job title. Why is that? What can be done about that? Whose decision is that?

ANSWER: This is not a decision made or managed by Human Resources. I think you are referring to the space standards approved by UNT. Here is the link to the standards page:

[https://vpaa.unt.edu/sites/default/files/IMCE/inserts/sab0047/office\\_size\\_standards.pdf](https://vpaa.unt.edu/sites/default/files/IMCE/inserts/sab0047/office_size_standards.pdf). This question should be addressed to the Office of Space Management and Planning and Facilities.

# Q&A with Barbara Abercrombie

## Campus Questions

How do we begin establishing career paths for people so they don't have to move to a new department or area on campus? It is making us lose institutional knowledge when we can't grow positions along the professional development path of the person.

ANSWER: The Job Evaluation and Grading Project identified job families and paths for career progression. Department leaders are encouraged to work with Campus HR to engage in succession planning activities to cultivate talent and provide growth opportunities. The HR compensation team is working to update the pay plan website with information, including the job families, functions and career paths.

# Q&A with Barbara Abercrombie

## Campus Questions

What does “at will” employment mean exactly for staff?

ANSWER: Texas is an at-will state, and what that means by definition is that generally, an employer or employee can choose to end employment for any reason and at any time. However, the university follows its policy on Staff Employee Discipline and Involuntary Termination in cases where termination of employment may be appropriate. Staff members have the right to resign from their positions at any time and for any reason, although we do request the courtesy of a two week notice.



# Q&A with Barbara Abercrombie

## Campus Questions

We are having ePAR issues, even when doing everything correct. We've been working with UNT University Budget Office because we cannot get timely assistance from UNT System. We understand there is only one employee working on ePARs from UNT System, any plans to change that structure?

*ANSWER: We have already made some changes here to add more support to ePAR. Donna Asher now has assistance from Dorothy Cummings starting last week. We thank you for your patience and ask that you continue to email any questions or issues to [ePAR\\_Help@untsystem.edu](mailto:ePAR_Help@untsystem.edu).*

# Q&A with Barbara Abercrombie

## Campus Questions

When we find an issue with our payroll encumbrances from an ePAR redistribution, who do we go to for assistance?

**ANSWER:** You need to contact the University Budget Office.

# Q&A with Barbara Abercrombie

## Campus Questions

In general, the reclassification process is a painful one. What are your thoughts on how we can make this better for everyone?

ANSWER: Would be interested in learning more about what is painful in order to properly respond to this question. However, in general, the university's policy on salary administration and the associated salary administration procedures restrict reclassification of a position to a vacant position or during an open reclassification window, usually held annually as authorized by campus leadership. The implementation of the ePAR enhancements has helped the workflow efficiency and provide the ability to monitor the progress of a reclassification request through the workflow status. Under the new electronic process, the ePAR requesting the reclassification is submitted, approved through required department officials, and classified by the HR Compensation team. Most positions will be reclassified with a 48 hour turnaround, if the classification already exists in the pay plan. For positions that do not align with existing classifications, a longer period is required to develop the position structure.

# Q&A with Barbara Abercrombie

## Campus Questions

Why do we have a defined window to reclassify filled staff positions? This has led to departments finding a workaround that results in duplication of efforts and opens the door to a concerning recruitment process, particularly regarding equal opportunity. Could it be considered to accept reclassification requests year-round, just like the vacancy reclassifications or at least more frequently than once per year?

**ANSWER:** This is a decision made by the campus leadership and not HR. However, this is not unique to UNT System.

# Q&A with Barbara Abercrombie

## Campus Questions

How can the reclassification process be made easier? If someone has a good reason for a reclassification, it's difficult to hear that "we are not in that period so we can't do it right now" and turn around and try to explain to an employee that they just have to wait --- weeks, months, or up to a year.

APRIL'S ANSWER: It is true that an employee may have to wait a few months for a reclassification. However, if we are doing our jobs effectively as supervisors it shouldn't be a yearlong wait. Needed reclassifications are not usually a surprise, the need builds over time. As supervisors we are tasked with monitoring our office operations and developing our staff. Again, during the annual evaluation process both the supervisor and employee have a responsibility to discuss assigned duties and job classification. IF that opportunity is missed, the consequences are waiting until the next reclassification window.

# Q&A with Barbara Abercrombie

## Campus Questions

Is there a way to make the hiring process for staff less bureaucratic and less cumbersome?

APRIL'S ANSWER: We recognize our current hiring process needs to be reviewed/improved to reduce the time required to fill a position. We also recognize that Salaries/Wages/Payroll Related Costs are the largest expense at the university. In FY2017, the university reported total operating expenses of \$628M, of that \$359M (roughly 58%) was spent in Salaries/Wages/Payroll Related Costs. It is important that we have adequate controls in place. Hiring a new employee is a long-term investment, a reoccurring expense, we take that commitment seriously. We are hopeful that with the assistance of Katy McDaniel and the support of Vice Chancellor Abercrombie we will make progress in finding the right balance of expediency and control in the very near future. Changes to the hiring process were announced by Katy McDaniel in A-team this morning, and that information is being communicated through the A-team distribution list and department heads and admins through email. These changes identified three areas of inefficiency and the solutions are expected to result in significant improvement in turnaround time for the offer process and elimination of duplicate work efforts.

# Annual Inventory Process

**April Barnes, AVP**

**University Budget & Analytics**

# Annual Inventory Process

- State law requires that a complete physical inventory be conducted each Fiscal Year.
  - *Tex. Gov't Code Ann. sec. 403.273 (f) and (g)*
- **All state employees** are held accountable for personal property items acquired with both state and non-state funds, and any donations. Each individual should practice safekeeping at all times.
- The University categorizes property as either capital or controlled assets. Capital assets are defined as any single tangible item valued at \$5,000 or above. Controlled assets are tangible items under \$5,000 and considered a high theft risk: computers (personal and handheld), cameras, video players, TVs, weapons.



# Annual Inventory Process

- Bad habits have developed over time.
  - Recent internal audit findings
  - Difficulty getting departments to complete their inventory on time
  - Custodian information is not updated regularly
- Challenges
  - Time of year to conduct inventory certification
  - Number of assets to certify
  - Faculty cooperation
  - Frequent turnover of inventory coordinators
  - Lack of ownership/accountability

# Annual Inventory Process

- New focus on compliance with the annual inventory process.
  - Regular review of custodian information by UNT Property Management
  - Spot checks to be completed throughout the year
  - Escalation for departments who do not complete inventory certification by the stated deadline
- Assistance Available
  - Held hand scanners
  - Helpful Queries in EIS
  - Inventory Coordinator Training, third Thursday every month
    - Register in [mylearning.unt.edu](https://mylearning.unt.edu) for course title Asset User Training
    - Next session scheduled for **12/20/2018**

# Annual Inventory Process

- Next Steps
  - Property Management will be sending out an email verifying inventory coordinator information is accurate.
  - Timeline will be developed for FY2019 process.
  - Instructions will be sent to inventory coordinators.
  - Reminder will be sent to department chair/director.
- Resources
  - <https://propertymanagement.unt.edu/inventory>
  - [Property.Manager@unt.edu](mailto:Property.Manager@unt.edu)
  - (940) 565-2392



# UNT Sam's Club Membership

April Barnes, AVP

University Budget & Analytics

# Sam's Club Card – Need to Know

- The University has 4 membership cards
  - Cards are controlled through the Office of the Senior VP for Finance and Administration except for Athletics and Discovery Park
  - Discovery Park and Athletics each have their own card
  - Card must be reserved in advance
  - Can only be used at Denton store (2850 West University Drive)
  - ABSOLUTELY NO ONLINE ORDERS

# Sam's Club Card – Need to Know

- Your responsibility
  - Confirm taxes are not assessed on the purchase **before** leaving the store
  - Must use a UNT PCard to pay for the purchase
  - No personal purchases are authorized
  - Return the card within 24 hours after pick-up
- Reserve a card by contacting Gylynn Hanson
  - Gylynn.Hanson@unt.edu
  - (940) 565-2055

# **ABA Updates**


**Brenda Cates, Director  
University Budget & Analytics**


# ABA Update/Reminders

- Approval Level – New Display (no drilling required)
  - *Campus Self-Service-Transfers (Budget & IDT)-View Budget Authorizations*

Find an Existing Value



▼ Search Criteria

Business Unit = ▼ NT752 

Transfer ID begins with ▼  

Budget Transfer Type = ▼

Transfer Status = ▼ Pending Approval

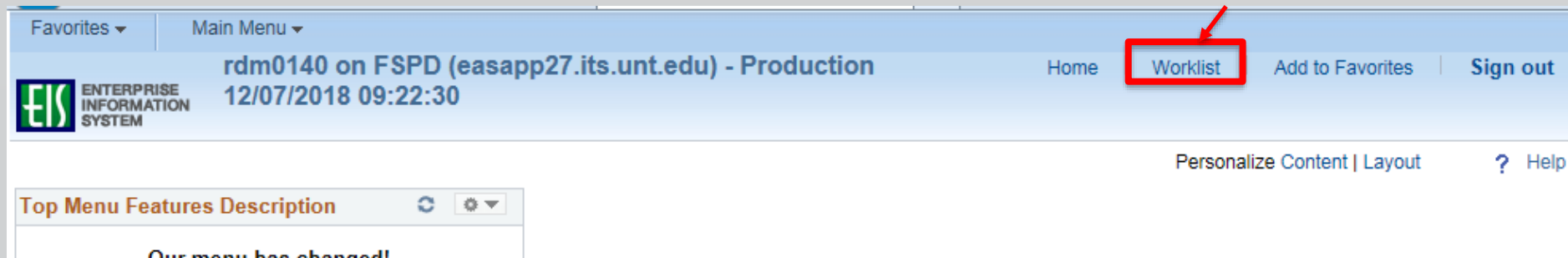
View All First  1-100 of 148  Last

Business Unit	Transfer ID	Type	Budget Transfer Type	Description	Transfer Status	Approval Level	Approver Name	Date Submitted	Requester
NT752	0000004861	ABA	Adjustment	Spring INSD Adjunct funds	Pending	Director Approval	Prybutok, Victor R	12/06/2018	Powell, Erica Nicole
NT752	0000004860	ABA	Adjustment	ANTH - DLFM Fall 2018	Pending	Department Manager	Squires, Susan Elaine	12/06/2018	Paswan, Christine M
NT752	0000004859	ABA	Adjustment	SPAN - DLFM Fall 2018	Pending	Department Manager	Manickam, Samuel C.	12/06/2018	Paswan, Christine M



# ABA Update/Reminders

- To Approve an ABA you must go through your “worklist”
  - Log into EIS > Click on Worklist on the top right hand side of the screen.



- If you navigate directly to an ABA without going through the worklist, **the approve button will not be available.**

# ABA Update/Reminders

View when accessing the ABA from the Worklist.

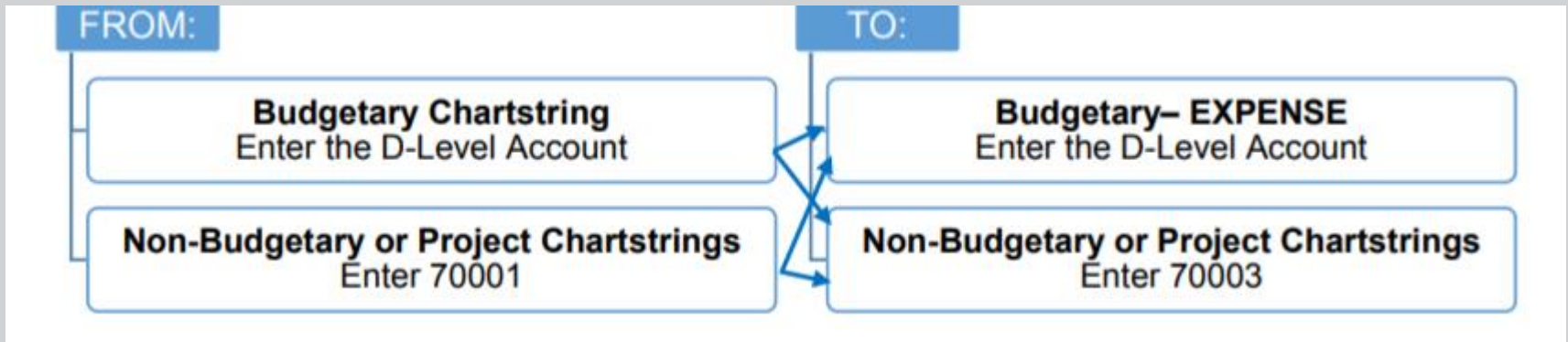
This screenshot shows the ABA update interface when accessed from the Worklist. The interface includes a header for 'FY18 Revenue - Psychology Dept: Pending' with options for 'Request Information' and 'Start New Path'. Below this is a 'Budget Office Routing' section showing 'Pending' status and 'Multiple Approvers' for 'ABA NT Budget Office Approvers'. An 'Enter Approver Comment' field is present. At the bottom, there are three buttons: 'Approve' and 'Deny' (both highlighted with a red box), and a yellow 'Return to worklist' button.

View when accessing the ABA from a location other than the Worklist.

This screenshot shows the ABA update interface when accessed from a location other than the Worklist. It features the same header and routing information as the first screenshot. The 'Enter Approver Comment' field is visible. At the bottom, there are three buttons: 'Approve' and 'Deny' (both highlighted with a red box), and a yellow 'Apply Changes' button.

# ABA Update/Reminders

- 3-step method has not delivered desired results
  - Campus will no longer need to create the additional lines for the transfer.
  - Budget Office will make any additional entries as appropriate.
- *Effective immediately, you can return to previous method*



# **Announcements**

## **University Budget & Analytics**

# Announcements

- December Trainings

Don't see a course on the mylearning.unt.edu portal? Still Come! If it's on the Budget Calendar it will be offered.

**We will be adding an ABA training.**

**OPEN LAB will be held on 12/14 and not the third Friday as usual.**

M	T	W	T	F
3	4	5	6	7
Budget Basics 1:00pm - 3:30pm BLB-090 - CLASS CANCELLED				First Fridays 2:30pm - 4:00pm Willis 250H
10	11	12	13	14
Cognos Project Reports 10:00am - 11:30am ESSC 152	Cognos Departmental Reports 1:00pm - 3:00pm ESSC 152		IDT Training 10:00am-12:00pm Willis 136	Open Lab 9:00AM - 11:00AM ESSC 152
17	18	19	20	21
	Budget Reconciler 10:00am - 11:30am ESSC 152		Budget Basics 1:00pm - 3:30pm BLB-090	

# Announcements

- Pcard Reconciliations

- Several UNT Pcard holders have not completed their reports for October and/or November.

- *Escalation will begin next week for those still outstanding*
    - *Pcard assistance will be available at December Open Lab on 12/14*
    - *Website to visit for additional training and helpful materials:*  
<http://www.untsystem.edu/hr-it-business-services/procurement/purchasing/purchasing-card-program>

# Announcements

- University Budget Office will begin budgeting revenues for projects on PC Business Units NDISC and NINTP weekly. You will no longer need to submit an ABA to budget revenue that has already been received.
- Budget Overrides on requisitions are an exception, not a standard business process.
  - Any overrides have to be approved by University Budget Office leadership.

# Announcements

- IDTs – New Form now in Effect!
  - IDTs completed on the old forms will be returned to the initiator for resubmission on the new form.
  - *IDT assistance will be available at the December Open Lab on 12/14*



# Announcements

- IDTs – New Form Now in Effect!
  - IDTs completed on the old forms will be returned to the initiator for resubmission on the new form.
  - *IDT assistance will be available at the December Open Lab on 12/14*

# Announcements

- Account D5470 Tuition Exemptions has been created.
  - Accounts 54700 – 54739 will now roll up to D5470.
  - This change was made to breakout scholarships (which are generally funded expenses) from exemptions (which are generally unfunded expenses).

# Announcements

- Cognos Department Budget Summary Report
  - Budgets are currently reflecting on the prior D-Level but will be moved in January via permanent adjustments.
    - The permanent adjustments will carry to Hyperion for FY20 Budget Planning.
  - Actuals are reflecting on the new D-Level

Account	Budget	Actual	P
<b>Expense</b>			
<a href="#">D5461</a> - Scholarships & Financial Aid - Function 630	\$506,787.52	\$0.00	
<a href="#">D5470</a> - Tuition Exemptions - Function 630	\$0.00	\$381,591.16	
<b>C5460 - Scholarships &amp; Financial Aid</b>	<b>\$506,787.52</b>	<b>\$381,591.16</b>	
<b>Expense Total</b>	<b>\$506,787.52</b>	<b>\$381,591.16</b>	

# Announcements

- Cognos Budget Overview Report
  - Expenses incurred prior to the implementation of the new D-Level are still showing on the old D-Level. Expenses incurred after the implementation of the new D-Level are reflecting on the new D-Level.
  - The University Budget Office will be making an entry to move all exemption expenses to the new D-Level.

200 - Designated Operating-Managed/880007 - Technology Use FFF		Exempt-Hazlewood (20017)	
Account	Function	Budget	Actuals
<b>Expense</b>			
D5461 - Scholarships & Financial Aid	630 - Scholarships and Fellow ships	<u>506,787.52</u>	<u>230,084.57</u>
D5470 - Tuition Exemptions	630 - Scholarships and Fellow ships	<u>0.00</u>	<u>151,506.59</u>
<b>Expense - Total</b>		<b>506,787.52</b>	<b>381,591.16</b>

# Upcoming First Fridays

- January – no meeting, online materials only
- February
  - COGNOS: Budget Overview Enhancements
  - COGNOS: Encumbrance Report
  - FY 2020 Budget Planning
  - Student Employment Resources
- March
  - Send us a note on topics you would like to discuss.



**Thank  
You.**

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