



# First Fridays

with the

# University Budget Office

# UNT<sup>®</sup>

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

**EST. 1890**

August 2, 2019

# Agenda

- Icebreaker
- Surplus/Central Receiving Changes
- Budget Buddy Assignments
- Announcements/Reminders
- Open Forum – Q&A

# Icebreaker

# We want to hear from you!

Please take a moment to jot down a comment, suggestion, or even an idea for an upcoming First Friday!



therine Du/NPR

# Surplus/Central Receiving Changes

## Surplus/Central Receiving Changes

- Increased focus on “*best practices*” methodology while providing a positive customer experience
- Verifying forms are completed correctly and signatures are appropriate (**EIS Dept Manager**)
  - Surplus Pickup
  - Annual Inventory Certification
  - Designated Inventory Coordinator Form
  - Campus Reuse Request
  - Missing Property

## Surplus/Central Receiving Changes

- Asset Spot Checks will start in FY20
  - Sampling of inventory based on information in EIS (location, custodian, etc.)
- Faculty/Staff viewing times will change for surplus items
  - no longer at the same time as public sales
  - will enforce the maximum of 5 working days hold before removing department tag (items staying around too long)
  - once per week, no longer twice per week (Thursday, 9AM-12PM only)

## Surplus/Central Receiving Changes

- Requisition approvals
  - Continue to review category code selected for controlled or capital items
  - Working with ITSS to investigate if a notification can be sent to the individual who entered the requisition originally that the requisition has been modified
  - When a category code is changed, that requisition **MUST** be budget checked again, which can produce a budget error if the roll-up changes

## Surplus/Central Receiving Changes

- Requisition approvals
  - The UNT System [Category Tool](#) provides description details and can be found on the Budget Website > Documents > 2. Requisition Category Codes
  - When searching for a category code, keep in mind there could be multiple terms for the same product. For example: Ipad = Tablet and Printer = Copier
  - Pay attention to the “Less/More than \$” amounts in the comments section.
  - For questions related to category codes/requisitions, reach out to the buyer listed as the contact on the Category Tool spreadsheet or email [buyers@untsystem.com](mailto:buyers@untsystem.com)

## Surplus/Central Receiving Changes

- Category Codes for Controlled (\$500-\$4,999.99)

- **840-67 (Controlled equipment)**

- *Sound systems and other audio equipment*

- *Cameras*

- *TVs, video players, recorders*

- *Unmanned aerial vehicle (drone)*

- *Data projectors*

- **204-52 (Computers controlled less \$5,000)**

- *Computer, Desktop*

- *Smartphones, tablets, & other hand held device*

- *Laptop computers*

# Budget Buddy Assignments

# Budget Buddy Assignments

- The Budget Office has been working with the Budget Users Group (BUGs) to train, equip, and grant necessary access within their department/college/area to make these roles more effective. BUGs were selected based on uniquely identified job codes.
  - For Example: Budget Officer, Academic Financial Officer, Etc.
- Beginning 9/1/19, each BUG will be assigned a “Budget Buddy” - a Budget Analyst within the Budget Office to be their primary contact and provide any essential back-up assistance.

# Budget Buddy Assignments

- This change encourages campus users to reach out to their area's Budget person as a **first point of contact**, while providing a more personal, focused back-up to BUGs.
- If your department does not have a BUG, all questions can route directly to the assigned "Budget Buddy".

## Alison McMillian– Budget Buddy Assignments

- College of Education – Glen Nakata & Terri Yip
- College of Engineering – Liz Assaad & Shanin Marshall
- HPS – Daphne Bishop
- Athletics – Matt Witty
- URCM – Kathy Burmeister
- Facilities – Joyce Courtney
- Division of Student Affairs – Kassie Grubbs
- Union – Phyllis Vaughn
- Auxiliary – Kristi Ormand
- Dining – Suzan Cruz
- Rec Sports – Lori Duvall
- Housing – Sharon Henderson
- *Institutional Equity & Diversity & Community Engagement*

## Christina Perez– Budget Buddy Assignments

- CLASS – Kathryn Cullivan & Naomi Alvarado
- College of Information – Rochelle Sykes
- Advancement – Tom Augsburger
- Alumni Relations –Margie Lagleder
- Research & Innovation – Tori Smith
- International Affairs – Jade Lu
- Library – AK Khan
- CLEAR – Karen Tumlinson & Teresa Rains-Cox
- Office of the President– Krista Watts
- Lifelong Learning – Lakshimi Arumagam
- Toulouse Grad School – Erica Powell
- *Vice Provost Academic Affairs (VPAA)*

## Shannon Rowland – Budget Buddy Assignments

- College of Science – Wendy Risdon, Jordan Bernot, Carol Gagnon
- College of Business – Brandi Everett
- Parking and Transportation – Vacant
- *Vice Provost Academic Outreach*
- *University Information Services*

## Vacant Position/Shannon (interim) – Budget Buddy Assignments

- CMHT – Tina Garza
- CVAD – Mary Braden
- College of Music – Emilita Marin
- TAMS – Courtney Watson
- Registrar – Mari Jo French
- Enrollment/Admissions/SFAS/ – Lindsay Goodman
- Risk Management Services – Jerri Duncan
- *Police Services*

## Budget Buddy Assignments - Example

- For instance, if an admin coordinator from Teacher Education and Administration had a budget question, they would first reach out to the corresponding BUG for College of Education – Glen Nakata.
- If Glen needed further assistance with the question, he would connect with Alison, his assigned Budget Buddy.

# Announcements & Reminders

# Announcements & Reminders

## YEAR END PLANNING

- Reporting Deadlines have been posted. Visit the Budget Website > [Year End Planning](#) Tab for information.
  - Friday, August 2 – all ePARS for payroll reallocations must have final approval by 5PM
- Begin clearing deficits via ABA/IDT as needed
  - All ABAs for FY19 should be processed and approved to be received by the Budget Office by 5PM.
  - IDTs and ABAs completed incorrectly – even if submitted by the deadline will not be processed in FY19
- More information can be found in [July's First Friday PowerPoint](#)

# Announcements & Reminders

## Project Budget Forms

- New requests that have not already transferred funds to Facilities OR requisitions entered for any portion of the project will be placed on hold until after 9/1/2019.
- Exceptions will be made for code compliance (safety) and projects that if delayed would detrimentally impact instruction.

# Announcements & Reminders

## Setting a Proxy

- Any faculty or administrator who plans to be out for an extended period should utilize the proxy delegation for ePRO and ABA so that business processes are not delayed.
- If a user is planning on being out for an extended period i.e., medical leave, etc., then dept org holder should be reassigned rather than delegating a proxy.
- Questions regarding proxy delegations and status of requests should be directed to BSC. You may also refer to [June's First Friday PowerPoint](#)

# Announcements & Reminders

## IDT Access

The Budget Office has received an increased amount of calls and emails from campus users regarding IDTs. Please keep in mind:

- Budget Office does not have the capability to grant IDT access or advise on the IDT process.
- The final deadline for paper IDTs was 7/31/19. Be sure to complete electronic IDTs moving forward.
- Please reach out to Financial Reporting at [FRO\\_Cash&CampusAcctg@untsystem.edu](mailto:FRO_Cash&CampusAcctg@untsystem.edu) with any IDT related questions or concerns.

# Announcements & Reminders

## Project Budget Forms – Hold until 9/1/19

- Please keep in mind that project requests that pass through the Budget Office for signature are for start dates **on or after 9/1/19**.
- Due to the spending diet and volume of requests received by Facilities, all requests will need to hold until FY20.
- Exceptions are only made for pre-determined projects already on the approved list, or for projects that are necessary to meet building code or safety measures.

# Open Forum – Q&A



**Thank You.**

**UNT<sup>®</sup>**

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

**EST. 1890**