First Fridays
with the
University Budget Office
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!
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”.

---

EST. 1890
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 Cullian & 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 – Cortney 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.
  
  o 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.
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 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.