

# BUSINESS BRIEFS

May 2023

## Important Dates

- 5/13 End of **Work-Study** appointments for spring/academic year.
- 5/24 Monthly payroll cut-off.
- 5/31 Anticipated open date for Graduate Assistant Reappointment System.

## Course Enrollment and Planning

With the end of Fall 2023 Early Registration, May is an ideal time to review enrollments. Upper-level undergraduate courses that are low (and will not be of interest to incoming graduate students) should be cancelled. Teaching staff can be redeployed in many cases to assist with relieving waitlisted courses.

## Preparation for 2024 Budget Planning

Ryan Kirkey, Jeff Donoghue, or CLAS HR will be following up on faculty forms that need to be processed (Terminations, Change to Emeritus, New Appointments, DEO changes, Retentions, Phased Retirements, Extension of Visitors/Lecturers, LWOPs, return from fellowships, and Changes to % Appointments).

Summer Support forms should also be submitted as soon as possible.

## Ethics and Responsibilities for UI Staff

Please review the [UI's Policy on Ethics](#).

It is important for University staff to be familiar with this policy as it incorporates the University's mission and values into a set of expectations for which we are individually accountable.

There are two Online ICON courses available (W00329: Ethics and Responsibilities and WSCQ01: Ethics) which can be found in Self Service under My Training. If you have not taken one of these courses during your employment at the UI, please do so.

## Grad Reappointment System

The anticipated date for the reappointment system to open to process grad appointments for the Fall 2023 semester is **May 31, 2023**. It will close on **August 11, 2023**. Once it opens, you will have the ability to change all active grad appointments. You will be able to change MFKs, % pay, job code, position numbers, etc. for all grad assistants without having to do a workflow form.

### CLAS HR Transaction Hub

Employment-related transaction requests should be routed through the [CLAS HR Transaction Request form](#) for student, complimentary, temporary and postdoc positions. Requests include:

- Appointments
- Status Changes (pay increase, end date change, classification change, percent effort change)
- Term

If you have questions about how the hiring or termination process for Faculty and P&S regular staff, please reach out to your respective HR representative or [CLAS-HR@uiowa.edu](mailto:CLAS-HR@uiowa.edu).

MFK changes should be submitted to CLAS Finance and Grant Support for Change of Status Accounting Only forms (student, complimentary, faculty, grad student or P&S). Please reach out to your [departmental accountant](#) to request MFK changes.

### Supplier Rewards, Membership and Rebates

Procurement cardholders are reminded that University policy prohibits the use of rewards programs for purchases because there is a potential for using rewards points for personal purchases. Because there is not a way to monitor such rewards in a way that is cost effective, the University's policy is that we should not participate in these programs. Examples of programs include, but are not limited to, Panera Rewards, ezCater Rewards, CVS Rewards, Amazon Prime, Best Buy Rewards, Hy-Vee fuel saver program, Menards' rebate programs, purchases from Costco and Apple gift cards. Questions regarding this policy can be directed to [renee-funk@uiowa.edu](mailto:renee-funk@uiowa.edu).

### FY2023 Submitted Fringe Benefit Rates

Use this [link](#) for the fringe benefits website. Use this [link](#) for the current F&A and FB rate agreement.

Rate Pool	FY2024 Fringe Benefit Pool Rate
Clinical Faculty	25.60%
Non-Clinical Faculty	31.20%
Professional & Scientific (includes Merit Exempt)	41.20%
SEIU	42.40%
Merit	53.70%
House Staff	25.50%
Graduate Assistants	20.30%
Fellowships	9.80%
Temporary	11.80%
Student	7.00%
Miscellaneous & Extra Compensation	5.30%

## FY23 Closing Timetable and Reminders

CLAS closing dates for FY23 are:

- **Friday, June 30 (6:30pm):** First Close Deadline: **We strongly encourage departments to have all of their entries posted before the First Close Deadline.**
- **Friday, July 7 (5:00pm):** Deadline for departments to make entries.

Use this [link](#) for the University Closing calendar.

Biweekly payroll for June and July:

- **Period May 28 – June 10:** must be received by the Payroll Office no later than **June 13, 5:00pm**, will be charged against period 12 FY23. Payroll checks will be dated and issued June 20. **Please submit ETRs as soon as possible to help Payroll Office facilitate the process.**
- **Period June 11 – June 24:** must be received by Payroll Office no later than **June 27, 5:00pm**, will be charged against period 1 FY24. Payroll checks will be dated and issued July 5 and accrued centrally for financial reporting purposes.
- **Period June 25 – July 8:** must be received by Payroll Office no later than **July 11, 5:00pm**, will be charged against period 1 FY24. Payroll checks will be dated and issued July 18. The payroll amounts for June 25-30 will be accrued centrally for financial reporting purposes.

**Note: Questions may be directed to Terri Hein at 335-2374 or [terri-hein@uiowa.edu](mailto:terri-hein@uiowa.edu).**

Retroactive Accounting-Only COS & PayCV Cost Transfer Justification (CTJ) processing by Payroll Services, GAO and AFR: (Link [to Grant Retroactive CTJ > 90 days](#) form; Link to [Non-Grant Retroactive CTJ >90 days](#) form)

- **Period 12:**
  - All **retroactive Accounting-Only COS** forms must be submitted in the HR Transaction system and complete through workflow by **June 26, 5:00pm**, for Payroll Services to process the COS and complete the associated PayCV entries in period 12, FY23.
  - Any **PayCV Retroactive CTJ > 90 days** forms (links above) must be submitted to Grant Accounting or AFR by **June 29, 4:00pm**, to complete the PayCV entries in period 12, FY23.
- **Period 13:**
  - All **retroactive Accounting-Only COS** forms for FY23 pay periods must be submitted in HR Transaction system and complete through workflow by **July 11, 5:00pm**, for Payroll Services to process the COS and complete the PayCV entries in period 13, FY23.
  - Any **PayCV Retroactive CTJ > 90 days** forms (links above) must be submitted to Grant Accounting or AFR by **July 12, 5:00pm**, to complete the PayCV entries in period 13, FY23.
- **Period 14:**
  - All **retroactive Accounting-Only COS** forms for FY23 pay periods must be submitted in HR Transaction system, complete through workflow, and approved by the Business Officer (ad-hoc as needed), and an email request to process the COS and complete the associated PayCV entries in period 14, FY23 sent to **Stacey Halverson** ([stacey-halverson@uiowa.edu](mailto:stacey-halverson@uiowa.edu)) in Payroll Services by **July 17, 5:00pm**. Any completed forms or requests submitted after this date will post in FY24.

- Any **PayCV Retroactive CTJ > 90 days** forms (links above) must be submitted to Grant Accounting or AFR by **July 17, 5:00pm**, to complete the PayCV entries in period 14, FY23. Any entries submitted after this date will post in FY24.

## Summer Session 2023 Reminder

Appointment information, including instructions have been sent out. Summer session appointments should be made to 050-11-xxxx-xxxx-54170000-xxxx-000-00000-10-0000. The following schedule represents the standard appointment periods for Summer 2023:

- 4 Week session: 5/15/23-6/09/23: pay prorated by calendar days and issued on 6/1/23 and 7/1/23.
- 6 Week I session: 5/15/23-6/23/23: pay prorated by calendar days and issued on 6/1/23 and 7/1/23.
- 8 Week session: 6/12/23-8/4/23: pay prorated by calendar days and issued on 7/1/23, 8/1/23 and 9/1/23.
- 6 Week II session: 6/26/23-8/4/23: pay prorated by calendar days and issued on 7/1/23, 8/1/23 and 9/1/23.
- 12 Week session: 5/15/23-8/4/23: pay prorated by calendar days and issued on 6/1/23, 7/1/23, 8/1/23 and 9/1/23.

The system should automatically calculate the amounts.

TA payment calculations should be handled as stated below.

- 4 Week and 12 Week session: Do not click the exception button. Let the form calculate based on the number of days in the appointment.
- 6 Week I session: Click on the exception button and pay in two equal installments on 6/1/23 and 7/1/23.
- 6 Week II and 8 Week session: First, let the form do the standard calculation. Then, take the sum of the amounts for the 7/1/23 and 8/1/23 payments and divide by 2. Click the exception button and then distribute that amount equally on 7/1/23 and 8/1/23. The 9/1/23 payment will remain the same as what the system calculated.

May and June salary/fringe will be “funded” during closing (Period 13). Accounts may have a negative free balance until the allocation is made. After the Period 13 allocation, the summer session accounts should have a free balance of zero for year end. July and August salary/fringe will be funded within the September/October period.

Please contact Jeff Donoghue ([jeff-donoghue@uiowa.edu](mailto:jeff-donoghue@uiowa.edu), 335-2605) with any questions.

## Food & Beverage and Recognition Policies

The annual review of both the departmental food and beverage and recognition policies are due to Kaitlyn Behan. Please look at both of them and, if no changes are needed, please initial and date the current policy form and resubmit it. If changes are required, please use the templates provided: [reward and recognition](#) and [food and beverage](#), and submit the revised policy for approval.

## CLAS Policies and Procedures Updates

Please use this link to see the CLAS policies that have been updated recently: <https://policy.clas.uiowa.edu/whats-new>.

### Contacts

**Tom Koepfel** – 335-0134 (Financial oversight & budgeting, Purchases over \$50K, DSP Workflow, Workflow & Security System)

**Jeff Donoghue** – 335-2605 (Staff & Visitor Budget, Chart Field Requests, Summer & Winter Session, Service Centers, Named Chairs)

**Kristina Swanson** – 335-0459 (TA/RA Budget, Renovation, Instructional Equipment, Book of Music/Subventions, Creative Writing)

**Beth Mellinger** – 353-2190 (General Expense Budget & Computer Replacement)

**Sandy Mast** – 335-9304 (Student Technology Fees, Research & Start Up)

**Ryan Kirkey** – 384-3489 (Faculty Budget, Old Gold Budget, First Year Seminar, Retention, Faculty Cost Sharing, Research Release)