FY2020 TA/RA Budget Process

In the annual budget planning application for FY20, we will be allocating your TA budget at the rate of $19,644 multiplied by the approved number of HTEs for your department. The departments are responsible for any amounts paid over COGS. If additional TA allocations are necessary, requests should be submitted through the CLAS MAX Request System. This includes allocations required for on-line classes.

The 2019-20 TA and RA templates should be used when preparing offer letters to graduate assistants for appointments in AY 2019-2020.

The templates are available at [https://clas.uiowa.edu/deos/administrative-manual-graduate-appointments](https://clas.uiowa.edu/deos/administrative-manual-graduate-appointments). Any appointments that, alone or combined with an appointment in another department, causes an employee to have a standard percent appointment greater than 50% required prior approval from both Dean Getz and Dean Campo in the Graduate College.

The graduating TA/RA appointments should be terminated as soon as you know they will be graduating. Be sure to select “graduating” for the reason and not “end of employment.” This selection impacts their benefits and summer coverage, so it is very important to select appropriately.

We are currently developing a budget process for tuition and fees. Additional information will be provided in April. The tuition and fee table may be found at [https://www.mauuiowa.edu/maui/pub/tuition/rates.page](https://www.mauuiowa.edu/maui/pub/tuition/rates.page).

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Important Dates:

- **4/24** Monthly payroll cutoff
- **4/26** PTEAP information entered into provost website [https://provost.uiowa.edu/apps/pteap](https://provost.uiowa.edu/apps/pteap). Please use the reports on the Provost WebPortal. When you have entered the information for your faculty, please have your DEO email the WebPortal “Departmental Summary Table” along with the signed individualized portfolio for non-unit norm faculty to Carole Kern (carol-kern@uiowa.edu). They can also be campus mailed to Carole Kern at 240 SH.
- **4/30** Exceptional Performance (Flex Pay) Awards due ([https://clas.uiowa.edu/human-resources/exceptional-performance-flexible-pay-awards](https://clas.uiowa.edu/human-resources/exceptional-performance-flexible-pay-awards)). Questions may be addressed to Nancy Fick (nancy-fick@uiowa.edu).
PROCESSING FORMS
PAYROLL FORMS FOR FY20 BUDGET

Please process any P&S termination forms for anyone who is terminating before June 30th by the payroll cutoff date of April 24. This will ensure that the FY2020 budget file is accurate.

Faculty who are retiring or leaving at the end of the year should have a termination form processed ASAP. Even if they are to become Emeritus faculty, a termination form MUST be done first, then a complimentary 0% Emeritus appointment form effective the day after the termination date can be completed. Please request a NEW position number for the emeritus position. (All employees should have a unique position number.) Forms should be initiated by April payroll cut-off to coincide with the FY20 budgeting process, if at all possible.

Please check the Faculty Status End Date report for all non-tenure track positions and initiate forms (either termination or reappointment) for anyone with an end date of 6/30/2019 or sooner: Self Service → Administration → HR Reports → Faculty Status Reports → Faculty Status End Date Report.

Please process New Appointment forms, if possible, for faculty who have accepted new positions for next year. All appointments should be made on new positions numbers.

Any faculty whose % times were changed through the year, please submit forms to return them to their original appointment percentage.

Please process forms for summer DEO’s: 050-11-XXXX-00000-52582000-10 Org Acct 161. The amounts will be the same as last summer, with the exception of any new DEO’s, in which case the appointment letters will need to be consulted.

SPOT Performance Awards

Effective March 26, 2019, SPOT Performance Awards will be processed with the regular monthly payroll and paid as a separate check. Your CLAS HR Rep and Transaction Initiator will receive an email indicating that the award has been approved. Your HR Rep will then provide you with a SPOT Performance Award certificate that can be presented to the recipient, as it will be your responsibility to notify them of the award. If you have any questions, please contact your CLAS HR Rep.

TA/RA CHANGE OF STATUS FORMS

TA/RA COS forms need to be completed and through the workflow system by Wednesday, May 8th, for the tuition to automatically update to follow the appointment MFK. After that date, override requests to gradcogsscholarships@uiowa.edu will no longer be an option to move tuition. A MAUI form will need to be processed and notification sent to Brian Ruden (brian-ruden@uiowa.edu) with a cc: to Jennifer Crawford (jennifer-crawford@uiowa.edu) noting the amount of tuition that is being covered and what funding source is being used.

Ourspring has come at last with the soft laughter of April suns and shadow of April showers.

- Byron Caldwell Smith
Preparing for FY19 Closing

We anticipate that the First Close will be Friday, June 28. Similar to last year, we expect a short turnaround time for departments to make entries. If you need to close old encumbrances, email Purchasing-ReqPO@uiowa.edu, including the following text – “Please close PO #xxxxxx written to Vendor xxxxxxx. All items have been received and paid for.”

We will start following up with departments who have a large number of unreconciled accounts (TDR’s). Please review your Dashboard within the EFR to determine if your department has unreconciled accounts.

Please review any food purchases that have been charged to Fund 050. Generally, food expenses should be charged to Foundation accounts or other funding sources.

Travel vouchers should be submitted as soon as a traveler returns from a trip. We will be monitoring travel near year end to ensure that all expenses are paid prior to June 30, 2019 are processed this fiscal year regardless of whether they are within the 120 day limit.

Summer Session

Appointment information, including instructions have been sent out. Summer session appointments should be made to 050-11-xxxx-xxxxx-xxxx-00000-10-0000. The following schedule represents the standard appointment periods for Summer 2019:

- 4 Week session: 5/14/19-6/07/19: pay prorated by calendar days and issued on 6/1/19 and 7/1/19.
- 6 Week I session: 5/14/19-6/21/19: pay prorated by calendar days and issued on 6/1/19 and 7/1/19.
- 8 Week session: 6/10/19-8/2/19: pay prorated by calendar days and issued on 7/1/19, 8/1/19 and 9/1/19.
- 6 Week II session: 6/24/19-8/2/19: pay prorated by calendar days and issued on 7/1/19, 8/1/19 and 9/1/19.
- 12 Week session: 5/15/19-8/2/19: pay prorated by calendar days and issued on 6/1/19, 7/1/19, 8/1/19 and 9/1/19.

The system should automatically calculate the amounts.

TA payment calculations are a little different this year and 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 2 equal installments on 6/1/19 and 7/1/19.
- 6 Week II and 8 Week session: First, let the form do the standard calculation. Then, take the sum of the amounts for the 7/1/19 and 8/1/19 payments and divide by 2. Click the exception button and then distribute that amount equally on 7/1/19 and 8/1/19. The 9/1/19 payment will remain the same as what the system calculated.

Please contact Jeff Donoghue with any questions.

Contacts:

Erin Herting – 384-0559 (Financial oversight & budgeting)
Jeff Donoghue – 335-2605 (Staff & Visitor Budget)
Meliza Wise – 353-2639 (Faculty Budget)
Kristen Wolf – 335-2616 (Startup & RA budget, Renovation/Instructional Equipment)
Kristina Swanson – 335-0459 (TA Budget)
Nick Francisco – 335-2888 (General Expense Budget)
Ronna Mayberry – 335-0577 (Old Gold Budget)
Rachel Vrchoticky – 467-0104 (Computer Replacement)
Ryan Kirkey – 384-3489 (Book & Music Subvention)
Sherry Roe – 335-1449 (Workflow & Security/System Access)

Summer 2019 Enrollment Management

As anticipated, enrollments in summer courses are significantly lower this year. Marlys Boote will be in contact with departments regarding cancellation decisions following this schedule:

- Week of April 1 – Courses with 6 or fewer enrollments, especially those with start dates in May, will be cancelled prior to Fall 2019 Early Registration (April 8).
- End of Fall Early Registration – Any remaining 4-week, 6-I week, or 12-week courses that have not met the 12-16 enrollment threshold will be cancelled.
- Late May/Early June – 8-week and 6-II week courses will be reviewed for final cancellation decisions.