FY2021 TA/RA Budget Process

In the annual budget planning application for FY22, we will be allocating your TA budget at the rate of $20,328 multiplied by the approved number of HTEs for your department. The 2021-22 TA and RA templates should be used when preparing offer letters to graduate assistants for appointments in AY 2021-2022. 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% requires 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.

TA/RA CHANGE OF STATUS FORMS

TA/RA COS forms need to be completed and through the workflow system by **Friday, May 7th**, 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.

**Important Dates:**

- **4/9** Deadline for PTEAP agreements for tenured faculty. Please access via Self Service – Human Resources Systems – Faculty Admin Center – Post-tenure Effort Allocation (PTEAP). Please route it to your DEO for signature. Any corrections should be sent to ui-frap@uiowa.edu.
- **4/26** Monthly payroll cutoff
- **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 Kari Gates (kari-gates@uiowa.edu).
PROCESSING FORMS
PAYROLL FORMS FOR FY22 BUDGET

Please process any P&S termination forms for anyone who is terminating before June 30th by the payroll cutoff date of March 24. This will assure that the FY2022 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 March payroll cut-off to coincide with the FY22 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 6/30/2021 or sooner: Self Service → Human Resources Systems → Data & Reports → 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**

SPOT Performance Awards will be processed with the regular monthly payroll and paid as a separate check. Your CLAS HR Rep and the 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.

In order to accurately track special compensation transactions that occur as a result of the COVID-19 pandemic, a checkbox has been added to all special comp forms. This includes prior approval and payment forms for all employee categories and form types. If the transactions isn’t the result of COVID-19, simply ignore the checkbox. We will generate reports based on the usage of the checkbox.

Please review the UI’s Policy on Ethics: http://opsmanual.uiowa.edu/human-resources/ethics-and-responsibilities-university-iowa-staff. It is very 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.
Departmental Business Placard (DBP)
Renewal and Changes – FY2022

Parking and Transportation is making changes to Departmental Business Placards (DBP) that will begin at the start of the FY 2022 permit year. It has been determined that a free DBP will no longer be offered to campus departments following a review of the parking system, campus needs, and university goals. DBPs are still available to all departments to assist with daily campus business for the annual cost of $372 per placard. Each department is unique in its needs and may not need a DBP. Changing to a for-fee placard is intended to encourage departments to understand their needs and choose alternatives to personal vehicle travel.

In June 2021, a renewal notice will be sent to departments to confirm or decline their departmental parking permits for the 2022 fiscal year, including DBPs.

Why is the free placard no longer offered?

- **Campus sustainability goals**: The university campus is continually working to improve walkability and sustainability by reducing single occupant vehicles and vehicle congestion. Offering a free DBP disincentivizes more sustainable transportation options provided or supported by the Parking and Transportation Department. Most trips across campus can easily be made by riding transit (CAMBUS), bicycling, walking, or university vehicle rental. CAMBUS also offers a door-to-door service – Bionic Bus – in addition to fixed route service for students, faculty, and staff with disabilities.

- **Parking system**: The parking system is monitored and tracked to provide data about parking lot and facility occupancy and usage trends. The most efficient use of available parking is essential for the parking system to function best. Using a DBP in a public parking facility or another faculty and staff parking lot during the day creates inefficiencies in the parking system. Increasing use of DBPs in recent years has placed additional pressure on public parking facilities. The parking system is also a self-supporting enterprise. Providing free parking in hourly facilities reduces that ability of the system to generate revenue necessary to invest in infrastructure and maintenance.

- **Campus needs**: The department has observed that some DBPs have little to no usage. Because a free DBP has been offered to all departments, some departments sign up for the free DBP and rarely use. Additionally, the use of virtual meetings is anticipated to continue to reduce the need for travel associated with campus meetings.

If you have any questions, please email parking-office@uiowa.edu or call (319) 335-1475.

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eCOI Reminder

Faculty and staff who are required to complete the eCOI Annual Disclosure must do so by **April 30, 2021**. Faculty and staff will use this same eCOI reporting system to keep their disclosures updated throughout the year if their situation changes. To complete your Annual Disclosure, log in to the online eCOI disclosure system at [https://ecoi.uiowa.edu](https://ecoi.uiowa.edu) using your HawkID.

Employees may go to the Compliance and Qualifications (CQ) system to view requirements that have been completed, are due now, due soon, or unfulfilled. Please refer any questions to [UHR-eCOI@uiowa.edu](mailto:UHR-eCOI@uiowa.edu).
Preparing for FY20 Closing

We anticipate that the First Close will be *Wednesday, June 30*. 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 #xxxxxxxx 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.

We realize a lot can happen between now and June 30th, but we need to start reporting early projections for fiscal year end. If you are aware of any carryover requests, please let your accountant know so they may communicate with the CLAS budget officer for approval. Reference the FY2021 Carryover Guidelines for what is allowable to carryover. Please provide these estimates your accountant by **May 15, 2021.**

Summer Session

Appointment information, including instructions have been sent out. Summer session appointments should be made to 050-11-xxxx-xxxxx-54170000-xxxx-000-00000-10-0000. The following schedule represents the standard appointment periods for Summer 2021:

- **4 Week session:** 5/18/21-6/11/21: pay prorated by calendar days and issued on 6/1/21 and 7/1/21.
- **6 Week I session:** 5/18/21-6/25/21: pay prorated by calendar days and issued on 6/1/21 and 7/1/21.
- **8 Week session:** 6/14/21-8/6/21: pay prorated by calendar days and issued on 7/1/21, 8/1/21 and 9/1/21.
- **6 Week II session:** 6/28/21-8/6/21: pay prorated by calendar days and issued on 7/1/21, 8/1/21 and 9/1/21.
- **12 Week session:** 5/18/21-8/6/21: pay prorated by calendar days and issued on 6/1/21, 7/1/21, 8/1/21 and 9/1/21.

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 2 equal installments on 6/1/21 and 7/1/21.
- **6 Week II and 8 Week session:** First, let the form do the standard calculation. Then, take the sum of the amounts for the 7/1/21 and 8/1/21 payments and divide by 2. Click the exception button and then distribute that amount equally on 7/1/21 and 8/1/21. The 9/1/21 payment will remain the same as what the system calculated.

Please contact Jeff Donoghue with any questions.

**Contacts:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone Number (Extension)</th>
<th>Department/Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Erin Herting</td>
<td>384-0559</td>
<td>(Financial oversight &amp; budgeting)</td>
</tr>
<tr>
<td>Jeff Donoghue</td>
<td>335-2605</td>
<td>(Staff &amp; Visitor Budget)</td>
</tr>
<tr>
<td>Kristen Wolf</td>
<td>335-2616</td>
<td>(Startup &amp; RA budget, Renovation/Instructional Equipment)</td>
</tr>
<tr>
<td>Kristina Swanson</td>
<td>335-0459</td>
<td>(TA Budget)</td>
</tr>
<tr>
<td>Beth Mellinger</td>
<td>335-2190</td>
<td>(General Expense Budget &amp; Computer Replacement)</td>
</tr>
<tr>
<td>Rachel Vrchoticky</td>
<td>467-0104</td>
<td>(Student Technology Fees)</td>
</tr>
<tr>
<td>Ryan Kirkey</td>
<td>384-3489</td>
<td>(Faculty Budget)</td>
</tr>
<tr>
<td>Sherry Roe</td>
<td>335-1449</td>
<td>(Old Gold Budget, First Year Seminar, Faculty Recruitment, Book &amp; Music Subvention, Workflow &amp; Security/System</td>
</tr>
</tbody>
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http://clas.uiowa.edu/finance  http://clas.uiowa.edu/human-resources

Please share with DEO’s and appropriate staff within your departments