



ConnectCarolina 2018 User Conference

BUSINESS MANAGERS ROUNDTABLE

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Facilitator



Making the connections

Business Manager Roundtable

Welcome





Ground Rules Facilitated Discussion

1. Everyone is encouraged to participate
2. Please introduce yourself the first time you contribute
3. Stay on Topic (10-15 minutes per topic)
4. Only one person at a time
5. Listen to and respect other points of view
6. This is a public discussion not a debate, we want to share ideas (no judgements)



Business Manager Roundtable

Making the connections

Survey

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Topic:Main Campus Purchasing Department initiative to increase PCARD use. Discussion: How are departments changing workflow to increase PCARD use?	1.00	5.00	3.67	1.33	1.78	9
7	Topic: Travel Reimbursement, Discussion: Travel continues to change its requirements. What does your department do to keep from getting rejections from the travel office (checklists, trainings, etc.)	2.00	5.00	3.67	0.94	0.89	9
2	Topic: Ram Tracker Implementation, Primary Focus: How are you using it and is it helping your department with status of awards?	1.00	5.00	2.80	1.17	1.36	10
9	Topic: OSR's view on no Administrative Supplies on Recharge Centers, Primary Focus: Is this causing an undue hardship on Departmental Sources as charges have to be moved off of Recharge Centers?	1.00	5.00	2.50	1.75	3.05	10
8	Topic: Disbursement's New Direct Deposit requirement for Vendors, Primary Focus: Is this causing an undue hardship on the departments?	1.00	5.00	3.70	1.55	2.41	10
4	Topic: Data Transfer with Outside Vendors, Primary Focus: How are you managing the approval process for Data Risk Assessment(Information Security Office), Data Steward Approvals, Business Associate Agreements and Data Use Agreements?	1.00	4.00	2.60	1.02	1.04	10
3	Topic: COI and Award Set up, Primary Focus: Is this COI office affecting timeliness of award set up and how are you managing?	1.00	5.00	2.70	1.19	1.41	10
6	Topic: Bottlenecks, Primary Focus: What bottlenecks occur in Campus processes that cause slowdowns and decrease efficiencies? We can identify and discuss who to reach out to.	3.00	5.00	3.60	0.80	0.64	10
5	Topic: ARP for SHRA and EHRA Employees: Primary Focus: How do you handle the aftermath of increases across all fund source types? What are your methods for making sure everyone is corrected?	2.00	5.00	3.60	1.11	1.24	10



Direct Deposit

- ☐ 1218.1.2f — Direct Deposit Authorization Form for Vendors (ACH Form)
The University now requires payees to receive payments electronically, unless the vendor is a student who does not own a bank account, then a check payment option is available.
- ☐ Initial Communication: This is for all vendors, but there will be exceptions for students and study subjects without bank accounts. Departments will be able to request checks for awards as needed. Vendors providing services and supplies for UNC will be expected to provide ACH information.
- ☐ Updated Communication: Banking Information (ACH form) not mandatory for study subjects, students and affiliates
- ☐ Question: What issues is this causing your department that we need to make Disbursements aware as well as influential committees around campus?



Campus Initiative to Increase PCARD Use

☐ POLICY, PROCEDURE AND FORM UPDATES

- ☐ In addition to process changes (Works,) policy updates will be implemented which will enable the University to move low-value purchases away from currently-used campus voucher and purchase order (PO) methods and into the P-Card system for increased efficiency.

☐ Questions

- ☐ How are you going to change your workflow in your department to change from Vouchers to Pcard Purchases?
- ☐ Are you adding more PCARDS?
- ☐ Are you being pushed by Purchasing to use the Pcard more?





Issue: Travel Rejections due to policy changes, policy enforcement, and communication with Departments

☐ Clarification to UNC Policy on Excess Lodging Expenses (March 2018)

- ☐ If limits are exceeded, travelers must complete Form 1302.1.1f Excess Lodging Justification and obtain their supervisor's approval and signature before travelling.

☐ Mileage Rates in Web Travel (Jan 2018)

- ☐ For business travel trips that utilize personal vehicles and **exceed 100 miles per trip, the employee shall be reimbursed at 33 cents per mile.** As this policy has shifted in interpretation over the past few years, we are providing a clarification chart and FAQs below to help in interpreting the new policy. See Policy [1310](#) for more information.

☐ Additional Required Forms (Sept 2018)

- ☐ Vendor Master File Record Data Form
(HUB Form and ACH requirement for Outside Travelers)
- ☐ ACH form – See Direct Deposit slide

☐ UNC Travel Policy vs. allowable grant expenditures

☐ Questions

- ☐ Is your department experiencing increased rejections from Travel?
- ☐ How has your department worked through the continued changing travel reimbursement requirements?





Post Annual Raise Process (ARP) changes

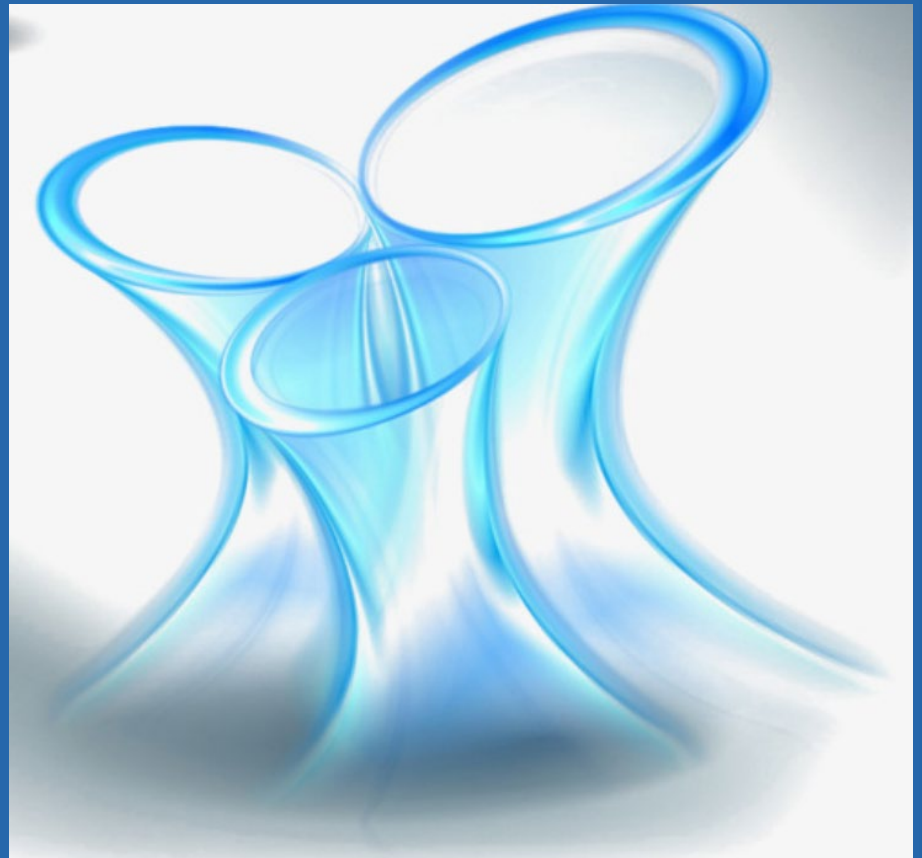
- ☐ ARP – Usually occurs from August to October
- ☐ Prior to Peoplesoft we could enter increases on the specific Salary Source Lines
- ☐ Post Peoplesoft, the ARP raises hit all fund sources equally (grants, supplement, departmental funds.)
- ☐ How does your team tackle the issue of corrections after ARP?

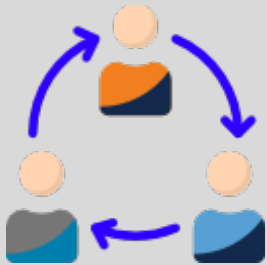




Bottlenecks

- ☐ What other areas are causing bottlenecks for your areas?
- ☐ What committees are we involved with that we can present the issue and possible solutions?





Thank You for Your Participation!



Please take a few minutes to complete the survey.