CUIBO Minutes – December 13, 2018

CUIBO Meeting opened with a presentation from Dan Ewart on IT Initiatives (a pdf of the slide deck was included with attachments sent prior to the meeting).

Volunteer Training – Nancy Spink

Nancy began her presentation stating that the reason for the Volunteer Process is in response to compliance issues and communication of information in a timely manner. She then went over the various positive and negative risks that can be involved with using Volunteers. Positives risks include: free service, community outreach, and teaching and learning opportunities for both volunteers and the UI community. Negative risks include: lack of background information about volunteers, need for compliance, workers compensation (lack of coverage).

Nancy stated that UI Risk statistics to date show about 111 Volunteer workflows completed. It takes about 12 minutes to complete the Volunteer workflow. The Volunteer Workflow is found on the Risk website at https://www.uidaho.edu/infrastructure/pss/risk-management/volunteers. Please use the forms from this website, as this is a dynamic process that can be improved/changed, and forms will be changed over time, if certain issues arise. She mentioned however that under circumstances where there is an activity using many volunteers, contact UI Risk for special arrangements. This process is a joint effort among: HR, Environmental Health and Safety, Office of Research Assurances, UI Risk, Office of General Counsel, and International Programs Office.

***Any questions please email risk@uidaho.edu or call 208-885- 7177.

Year- end Schedules -- Linda Campos and Delora Shoop

Delora stated that any deposits, cashier sessions, DRTs will need to be into the Student Account office by 10:30am on December 21st, 2018.

Updated Post Doc Salary Guidelines – Kim Salisbury (handout was included with attachments)

Information was given on the change from the previous Post Doc Salary guidelines. There is no longer a policy maximum on postdoctoral fellow salary, but all proposed salaries above 110% of the Postdoctoral Market Salary require the justification for the salary to be documented.

These salary requests will not be required to go through PeopleAdmin but when they are going through on EPAF, it is asked that you include the (CIP) that you are hiring the Post Doc into. This will assist the Budget office in reviewing guidelines for that position.

Controller Office Updates – Linda Campos

Chart V labs will still be offered once a month. The next lab is on December 18th, 2018 from 2:00pm-3:30pm in BPC 040A. These sessions are scheduled as a drop in style. The schedule of the future Chart V Labs will be found on the Banner resource page once they are scheduled, and a notice will be sent to the CUIBO and FIG lists. There has been a written record of the questions during these labs, which resulted in a document called *Chart V Lab FAQs*. This document has been uploaded to the Banner resource page and can be found under Chart V Training Materials and will be updated as needed to reflect any new questions that might benefit users.

Chrome River Travel and Expense System is on schedule for implementation in Spring 2019. Feedback has been given to the developers after the first build. We anticipate the initial User Acceptance Testing phase to be in the January – February timeframe.

Late Travel Authorizations Report is still under review after some discrepancies have been found with the results. Moving forward we will be sending reports monthly. We are working on having additional trip details included on the future reports.

Banner Resource Page Updates-

Just a reminder to send questions or concerns to banner9info@uidaho.edu or finaccess@uidaho.edu until further notice.

Budget Office Updates – Trina Mahoney

Information was given regarding FY20 permanent reductions. Benefits related to any salary reduction can be included in meeting your department reduction targets. Reduction plans need to be submitted to Trina Mahoney, Budget Office by January 31st. Academic Affairs units should work with Kim Salisbury regarding any additional deadlines within Academic Affairs.

Trina wanted to let units know that they plan to base FY20 CEC funding on FY20 PBUD. For example, if a position is base funded on GEN ED in FY20 PBUD, they will be funded centrally other than any additional unit increases that may be allowed. This is different from past years where it was based on current year (FY19) PBUD records. This means it is even more important than usual that units get their permanent changes to Jill no later than April 1.

Trina also stated that the banner report FGIBAVL now includes fund transfers- in. The exclusion of transfers-in from BAVL was a UI modification to Banner 8 that will not be made to Banner 9. She suggested using the Budget to Actual tool in Argos as a replacement to FGIBAVL. Central finance staff will be looking at how we treat transfers (both in and out) in Banner compared to standard/best practice with possible changes to come. This will be discussed further at a future CUIBO meeting.

Other Items and Announcements – Discussion from the groups

- An email has been submitted to finaccess regarding a request to format the Budget status report with additional lines at the end of the report. This should be resolved shortly.
- Requests for account codes to be included in the expense and revenue codes booklet can be emailed to hayleym@uidaho.edu until further notice. The most recent versions of these booklets can be found on the General Accounting page under Resources
- Reports that are being used consistently in the testing folder and are working correctly, we ask that you please send a notification to finaccess so that it can be moved to the production folder.

Tips and Tricks Discussed

- There is an **Expense Code tool** that will be found on the General Accounting page under Resources to assist in finding the correct codes.
- CTRL SHIFT R is a keyboard shortcut in Banner to get to the "Tools/Related tab" without moving over to your mouse.