

Bridging the Finance and Human Resources Gap

2nd Annual UIC Bringing Administrator Together
Conference

March 7, 2008



Goals of Session

- Define Current Campus Practices
- Identify Current Challenges and Provide Suggestions on How to Improve Communication
- Determine if there is a strong desire or need for Campus assistance to bridge the communication and knowledge gaps

Current Campus Practices

We are Two Separate Islands

Finance



HR



Challenges

- Fiscal Year vs. Grant Year vs. Academic Year
- HR Deadlines and Payroll Calculation Dates
- Employee Contract Commitments (i.e. notices of non-reappointment, FTEs, maximums on visiting appointments, visa expiration dates & sponsorship)
- Actual Salary dollars vs. Fringe Benefit Rates for Different Employee Types, FTEs and Funding
- Payroll Month vs. Calendar Month
- Validating Effort Certification
- Separate Reporting Tool Universes
- Separate Communication Mechanism

Constructing the Bridge



Suggestions on How to Improve Communication

- Finance Manager can provide the HR Manager a list of Grants with Expiration Dates
- Finance Manager can provide a format/form for requests to place employees on grants for proper allocation
- HR Manager needs to make Finance Manager aware of HR Policies and Procedures that are impacted by grant end dates (i.e. notices of non-reappointment)
- Finance Managers need to educate HR Managers on Benefit Fringe Rates and External Policies
- Quarterly/Monthly Meetings to discuss new grant awards or all of the above
- Finance Universe needs to be Bridged to HR Universe (Decision Support)

Tools You Can Use

- Fund List
- IHRP Change in Current Appointment Form
- IHRP BA3 Shadow System
- Faculty Summer Salary Appointment Form
- OBFS Payroll Schedule
- Sign up for OBFS News Alerts
- HR E-News
- Decision Support Solutions Library
- Payroll Calculator found Payroll Website



Fund List

| INDEX | Agency number | CONTRACT | FUND | ORG | PROG | Start date | Expiration | COMMENTS | PAF no. |
|--------|-----------------------------|--|--------|--------|--------|------------|------------|--------------|----------------------------|
| E61702 | NINR - Day | Improving Diabetes - Minority Supp. | 493192 | 892000 | 191100 | 9/27/2006 | 7/31/2011 | | |
| E71866 | CDC | IPRC - Ruggiero Supplement | 493179 | 892000 | 191100 | 9/30/2004 | 9/29/2009 | | |
| E71339 | U of C | C CEHPE | 493409 | 892032 | 191100 | 5/16/2007 | 8/31/2008 | | |
| E68811 | NIH - RD1 Ca123444 | Smoking related tv advertising and population smoking | 493434 | 892024 | 191100 | 7/1/2007 | 5/31/2011 | | |
| E58301 | NIH-Iowa Sub | Iowa SUB | 493488 | 892035 | 191100 | | | | |
| E60741 | U of S. Carolina 07-1360 | Prevention Research to Promote and Protect Brain Health | 493678 | 892020 | 191100 | 9/30/2006 | 9/29/2007 | | 2006-06433 |
| E61021 | NIH - K99 | K Award | 493713 | 892024 | 191100 | 12/1/2006 | 11/30/2008 | | |
| E6123 | U. of Wisconsin | TTURC 3- Health care Costs and Utilization of Smoking and Quitting | 493746 | 892006 | 191100 | 9/1/2006 | 8/31/2007 | Anticipation | |
| E61421 | Governor's State University | Building Capacity for Health Disparities Research | 493773 | 892032 | 191100 | 9/30/2006 | 9/29/2011 | | 2005-05717 |
| E61701 | RD1 NR010313-01A1 | Improving Diabetes Self Management in Minorities | 493819 | 892000 | 191100 | 9/27/2006 | 7/31/2011 | | 2006-07388 |
| E7579E | P20 M00024-04 | Project EXPORT - IHRP Allocation | 493838 | 892000 | 191100 | 9/1/2006 | 8/31/2007 | | subacct. Of Glasser (Yr 4) |
| E76363 | RD1 Ag023424-03S1 | Exercise Adherence -supplement | 493840 | 892020 | 191100 | 9/15/2006 | 8/31/2006 | | |
| E63361 | U of Washington 159906 | Defining the Public Health Role in Depression and Depressive Disorders | 494009 | 892021 | 191100 | 9/30/2006 | 9/29/2006 | | |
| E76519 | Roybalseed | Pilot grant from Roybal | 494190 | 892020 | 191100 | 1/1/2006 | 12/31/2006 | | |
| E63921 | USDA | Diet, Weight, and USDA School Meal Participation | 494091 | 892037 | 191100 | 6/22/2006 | 8/14/2007 | | |
| E71336 | U. of Chicago | Economic Analysis of Cost/Benefits of Positive Action Program | 494219 | 892024 | 191100 | 10/1/2006 | 9/29/2007 | | |
| E64891 | U of Wisconsin J071466 | TTURC-Health care Costs and Utilization of Smoking and Quitting | 494215 | 892006 | 191100 | 9/1/2006 | 8/31/2006 | | |
| E7653C | Project 2 | UIC Centers for Population Health and Health Disparities | 494233 | 892000 | 191100 | 9/30/2003 | 8/31/2008 | | |
| E71335 | U of C | C CEHPE. A Community Based Approach | 494258 | 892037 | 191100 | 2/1/2006 | 9/29/2007 | | |
| E71864 | CDC U48 Dp00048-02S1 | Illinois Prevention Research Center- Cardiovascular | 494275 | 892006 | 191100 | 9/30/2006 | 9/29/2007 | | |
| E71864 | CDC U48 Dp00048-02S1 | Illinois Prevention Research Center- Cardiovascular | 494275 | 892006 | 191100 | 9/30/2007 | 9/29/2009 | | |

Change in Current Appointment Form

New! CHANGE IN CURRENT APPOINTMENT FORM

Name of Employee: _____
 UIN: _____
 PI: _____

Reappointment
 Redistribution
 New Appointment

Present Appointment: **(only include fields that are affected)**

| Total Appt % | POSN | FOAPAL Percent | FOP | | | | Eff. Date | End Date | Monthly | Total Rate | Tuition Waiver Y / N |
|--------------|------|----------------|------|------------------|----------------------|----------------------|-----------|----------|---------------------------------|------------|----------------------|
| | | | Fund | Org ¹ | Account ¹ | Program ¹ | | | Hourly <input type="checkbox"/> | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

0.00% TOTAL 0.00%

¹ if using ICR or state account, please indicate org and program codes in addition to fund number

Monthly: \$0.00 Annual: \$0.00

Comments:

Re-appointment/Request Changes:

| Total Appt % | POSN | FOAPAL Percent | FOP | | | | Eff. Date | End Date | Monthly | Total Rate |
|--------------|------|----------------|------|------------------|----------------------|----------------------|-----------|----------|---------------------------------|------------|
| | | | Fund | Org ¹ | Account ¹ | Program ¹ | | | Hourly <input type="checkbox"/> | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

0.00% TOTAL 0.00%

¹ if using ICR or state account, please indicate org and program codes in addition to fund number

Monthly: \$0.00 Annual: \$0.00

Comments:

| Academic Dates: | |
|-----------------|--------------|
| Academic Year | 8/16 - 5/15 |
| Fall Semester | 8/16 - 12/31 |
| Spring Semester | 1/1 - 5/15 |
| Summer Session | 5/16 - 8/15 |

PI/Projects Coord: _____ Date: _____
 Grant Manager (Ahlam/Kim/Paul/Rot) _____ Date: _____
 Human Resources (John/Lupe) _____ Date: _____

IHRP BA3 Shadow System

Payroll Documents

File Edit View Records Tools Help

General | Distribution | Datasheet | Notes | Summary | Filters

Funding Summary for [REDACTED]

| | Jul 07 | Jul 07 | Aug 07 | Mar 08 | Jun 08 | Aug 08 | Nov 08 |
|-----------------------|---------|---------|--------|---------|--------|--------|--------|
| 2493434892024191100 1 | | 50.00% | | 50.00% | 13.00% | | |
| 2556656892000191100 1 | | | | 74.00% | 74.00% | | |
| 2557707892024191100 3 | | | | 13.00% | 13.00% | 50.00% | |
| 2558698892000191100 5 | 100.00% | 50.00% | | 50.00% | | | |
| Total ALL | 100.00% | 100.00% | | 100.00% | 27.00% | 50.00% | |

[REDACTED] - Active Pay Doc: Starting 08-01-2008

Post / Regost

Faculty Summer Salary Worksheet

IHRP Faculty Summer Support By Percentage

Name: _____

Summer Periods: **May 16-June 15, June 16-July 15, July 16-August 15**

UIN# _____

Annual (Base) Salary: **\$81,835.88**

*** Please note, any funding over 2/9ths will need a Request for Exception to the Limit Form approved by the Dean of the Home Department and by the Dean of the School of Public Health.**

Monthly Rate: **\$6,819.66**

1/9th Rate: **\$9,092.88**

| | % Time | Amount | Grant Title | FOAPAL | | | Appointment Dates | | Comments (if necessary) | |
|------------|--------|------------|----------------------|--------|--------|---------|-------------------|------------|-------------------------|----------|
| | | | | Fund | Org | Account | Program | Start Date | | End Date |
| 1/9 | 25% | \$2,273.22 | Po1 | 493751 | 892000 | | 191100 | 5/16/2008 | 6/15/2008 | |
| | 34% | \$3,091.58 | TTURC | 480241 | 892012 | | 191100 | 5/16/2008 | 6/15/2008 | |
| | 25% | \$2,273.22 | IHRP Faculty Support | 455637 | 892010 | | 191100 | 5/16/2008 | 6/15/2008 | |
| | 16% | \$1,454.86 | Health Disparities | 493819 | 892020 | | 191100 | 5/16/2008 | 6/15/2008 | |
| | | \$0.00 | | | | | | | | |

Subtotal: 100.00% \$9,092.88

| | | | | | | | | | | |
|------------|-----|------------|----------------------|--------|--------|--|--------|-----------|-----------|--|
| 2/9 | 23% | \$2,091.36 | Po1 | 493751 | 892000 | | 191100 | 5/16/2008 | 6/15/2008 | |
| | 25% | \$2,273.22 | TTURC | 480241 | 892012 | | 191100 | 5/16/2008 | 6/15/2008 | |
| | 30% | \$2,727.86 | IHRP Faculty Support | 455637 | 892010 | | 191100 | 5/16/2008 | 6/15/2008 | |
| | 22% | \$2,000.43 | Health Disparities | 493819 | 892020 | | 191100 | 5/16/2008 | 6/15/2008 | |
| | | \$0.00 | | | | | | | | |

Subtotal: 100.00% \$9,092.88

| | | | | | | | | | | |
|-------------|--|--------|--|--|--|--|--|--|--|--|
| 3/9* | | \$0.00 | | | | | | | | |
| | | \$0.00 | | | | | | | | |
| | | \$0.00 | | | | | | | | |
| | | \$0.00 | | | | | | | | |
| | | \$0.00 | | | | | | | | |

Subtotal: 0.00% \$0.00

Grand Totals: \$18,185.75

PI/Projects Coord: _____

Date: _____

Grant Manager (Ahlan/Kim/Pau/Rob) _____

Date: _____

Human Resources (John/Lupe) _____

Date: _____

Do We Need Help to Build This Bridge?

- How can Campus help us bridge the communication gap?
- What are you doing to “Bridge the Gap”/What has worked for you?
- Other questions/suggestions