

# BUSINESS BRIEFS

November 2023

## Important Dates

- 11/10 [Mary Louise Kelley Professional Development Staff Award Applications due](#)
- 11/11 [Gift Certificates to be reported to Payroll Office](#)
- 11/13 [Summer 24 Old Gold Application due to Dean's Office](#)
- 11/15 [Open Enrollment Deadline](#)
- 11/22 [Monthly payroll cut-off](#)

## Graduate Assistant Reappointment System

The TA reappointment system will open at the beginning of December to process appointments that will continue for the spring semester. The anticipated date for the Grad Reappointment system to open is December 4. It will close on January 12, 2024. Any changes to spring TA/RA appointments after this date will need to be handled through a workflow form.

- Those who held a first semester (A) appointment will pull in as a second semester (B) appointment and will need to either be transferred, terminated, or if continuing in your department, corrected to reflect their spring appointment.
  - If terminated, please submit termination forms.
- You will also have the ability to look over ALL active grad appointments (even pay group 7-academic year), with a chance to change MFKs, standard hours, job code, position number, and pay, if needed.
  - **IF YOU ARE CHANGING JOB CODE (i.e., from TA to RA), you must change the position number.**
- If no changes are needed to a pay group 7 or 7F, please mark them as “final” to acknowledge the record has been reviewed.

## Graduate Assistant Fall 2023 Tuition

A tuition change will automatically occur for any change of status (COS) to a TA or RA MFK that is processed through workflow and posted in the HR system by December 6.

- If no COS is needed, but tuition needs to be moved, you should request an override (example: move tuition off a 500 or 510 to a 240 fund).
  - This may be done by sending an email to [grad-cogsscholarships@uiowa.edu](mailto:grad-cogsscholarships@uiowa.edu) before December 6.
- Overrides can be created for the full tuition/fee amount charged to an MFK, but if a split is needed, a MAUI scholarship recipient form should be used.

- Please follow up with an email to Abby Humphrey and Jennifer Crawford explaining the request.
- Any changes after December 6th will need to be done as follows:
  - Please submit a MAUI scholarship recipient form.
  - Once a MAUI scholarship recipient form is submitted, an email should be sent to [ubill-3rdparty@uiowa.edu](mailto:ubill-3rdparty@uiowa.edu), [grad-cogsscholarships@uiowa.edu](mailto:grad-cogsscholarships@uiowa.edu), and Jennifer Crawford to let them know the form is not a new award but to move an existing award.
- If you have any questions, please contact Jennifer Crawford, 5-3493, or Abby Humphrey, 5-2850.

## 2023 Benefits Open Enrollment

The Annual Benefits Open Enrollment for faculty and staff begins **November 1** and will end on **November 15, 2023**, at 5:00 pm.

- **If no changes or new elections are made during the open enrollment period, current coverage will remain the same for 2024, apart from FSA enrollment.** If applicable, the Health Care FSA will only include the unused benefit credits, and the Dependent Care FSA will be \$0.
- If an employee switches from one health plan to another, Wellmark will mail a new insurance card before Jan. 1.
- Elections made during the open enrollment period will be effective Jan. 1, 2024, through Dec. 31, 2024, and cannot be changed during the year unless there is a [qualifying event](#).

*\*\*We encourage departments to limit the number of workflow transactions entered during open enrollment to only those necessary. Changes can impact an employee's ability to access their open enrollment event.*

## UI Ethics Policy

Please remind new DEOs and other employees with fiscal responsibilities of the [UI Ethics Policy](#).

It is recommended that CLAS employees review and complete the ICON Ethics and Responsibilities course #W00329 and/or FSC Q01: Ethics course #WSCQ01 once per year.

## November Payroll Cutoff

Normal reporting for employee time record data sent electronically or online via self-service is to be in payroll by **Wednesday, November 15 at 5:00 p.m.** to allow for the Thanksgiving holiday. Monthly payroll cutoff will be **Wednesday, November 22 at 5:00 p.m.**

Biweekly payroll cutoff for the November 21 payroll (biweekly time-period October 29-November 11) will be **Tuesday, November 14 at 5:00 p.m.** Biweekly time records are due on **Tuesday, November 14 at 5:00 p.m.**

### Cash Handling Reminder

While changes to staff specifically assigned to a cash handling function do not require re-submission of the departmental cash handling procedures to Accounting and Financial Reporting (AFR) for approval, they do need to be made to the Cash Handling Institutional Roles. Please forward any cash handling role staff changes to [thomas-koepfel@uiowa.edu](mailto:thomas-koepfel@uiowa.edu) so that he can update the Cash Handling Institutional Roles and ensure the Cash Handling training requirements have been met.

The local Cash Handling desktop procedures need to be updated and resubmitted to AFR once every 3 years, or when there are procedural changes (i.e., checks are now stored in a safe instead of a locked drawer). AFR or Tom Koepfel will send you a reminder of the 3-year deadline.

Units should be aware that, at any time, AFR and internal or external auditors might visit cash handling units to perform unannounced cash observations or cash counts. Please ensure that your local Cash Handling procedures match the Institutional Roles and that everyone assigned a cash handling role has taken the required annual training.

### Food, Beverage, and Recognition Policies Reminder

If you have not completed the annual review of both the departmental food & beverage and recognition policies please do so by November 30, 2023. Send them to Tom Koepfel for processing. Please look at them both and, if no changes are needed, please initial and date the current policy form and resubmit it. If changes are required, please use the templates provided ([Recognition](#); [Food and Beverage](#)) and submit the revised policy for approval.

### Gift Receipt

All gift certificates awarded to employees must be reported to University Payroll Services. If you have not already done so, please forward your information by November 11th. Any gift certificates awarded after November 11th will be reported in the next calendar year.

Gift certificate information must either be entered on the [Taxable Items Work Sheet for Payroll Services](#), or an excel spreadsheet with the same fields, then forwarded as an email attachment, to [payroll-services@uiowa.edu](mailto:payroll-services@uiowa.edu).

### Technology Purchasing Process

The CLAS technology purchasing policies and procedures can be found on the CLAS IT Group website under User Support/IT Standards and Best Practices: <https://clas.uiowa.edu/it-group/equipment-purchasing-standards>.

### Contacts

**Tom Koepfel** – 335-0134 (Financial oversight and budgeting, Purchases over \$50K, DSP Workflow, Workflow and Security System)

**Jeff Donoghue** – 335-2605 (Staff and Visitor Budget, Chart Field Requests, Summer and Winter Session, Service Centers, Named Chairs)

**Kristina Swanson** – 335-0459 (TA/RA Budget, Renovation, Instructional Equipment, Book of Music/Subventions, Creative Writing)

**Beth Mellinger** – 353-2190 (General Expense Budget and Computer Replacement)

**Sandy Mast** – 335-9304 (Student Technology Fees, Research and Start Up)

**Ryan Kirkey** – 384-3489 (Faculty Budget, Old Gold Budget, First Year Seminar, Retention, Faculty Cost Sharing, Research Release)