

# BUSINESS BRIEFS

May 2024

## Important Dates

- 5/11 End date of the 2023-2024 Work-Study appointments
- 5/24 Monthly payroll cut-off
- 5/31 Anticipated open date for Graduate Assistant Reappointment System

## Course Enrollment and Planning

With the end of Fall 2024 Early Registration, May is an ideal time to review enrollments. Upper-level undergraduate courses that are low (and will not be of interest to incoming graduate students) should be cancelled. Teaching staff can be redeployed in many cases to assist with relieving waitlisted courses.

## Ethics and Responsibilities for UI Staff

Please review the [UI's Policy on Ethics](#).

It is 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.

## Grad Reappointment System

The anticipated date for the reappointment system to open to process grad appointments for the Fall 2024 semester is **May 31, 2024**. It will close on **August 16, 2024**. Once it opens, you will have the ability to change all active grad appointments. You will be able to change MFKs, % pay, job code, position numbers, etc. for all grad assistants without having to do a workflow form.

## CLAS HR Transaction Hub

Employment-related transaction requests should be routed through the [CLAS HR Transaction Request form](#) for student, complimentary, temporary and postdoc positions. Requests include:

- Additional Payment
- Change of Status (end date, MFK, pay rate, etc.)
- New Hire/Appointment – Faculty/Staff (regular and temporary)

- New Hire/Appointment – Student
- Termination

If you have questions about how the hiring or termination process for Faculty and P&S regular staff, please reach out to your respective [HR representative](#) or [clas-hr-transactions@uiowa.edu](mailto:clas-hr-transactions@uiowa.edu).

MFK changes should be submitted to CLAS Finance and Grant Support for Change of Status Accounting Only forms (student, complimentary, faculty, grad student or P&S). Please reach out to your [departmental accountant](#) to request MFK changes.

## Supplier Rewards, Membership and Rebates

Procurement cardholders are reminded that University policy prohibits the use of rewards programs for purchases because there is a potential for using rewards points for personal purchases. Because there is not a way to monitor such rewards in a way that is cost effective, the University's policy is that we should not participate in these programs. Examples of programs include, but are not limited to, Panera Rewards, ezCater Rewards, CVS Rewards, Amazon Prime, Best Buy Rewards, Hy-Vee fuel saver program, Menards' rebate programs, purchases from Costco and Apple gift cards. Purchasing has been working on updating their website here is the link <https://ap-purchasing.fo.uiowa.edu/> Questions regarding this policy can be directed to [renee-funk@uiowa.edu](mailto:renee-funk@uiowa.edu).

## FY2023 Submitted Fringe Benefit Rates

Use this [link](#) for the fringe benefits website. Use this [link](#) for the current F&A and FB rate agreement.

Rate Pool	FY2025 Fringe Benefit Pool Rate
Clinical Faculty	24.70%
Non-Clinical Faculty	31.40%
Professional & Scientific (includes Merit Exempt)	40.50%
SEIU	42.50%
Merit	54.00%
House Staff	26.00%
Graduate Assistants/Post Docs	19.70%
Fellowships	9.60%
Temporary	11.80%
Student	7.20%
Miscellaneous & Extra Compensation	4.70%

## FY24 Closing Timetable and Reminders

CLAS closing dates for FY24 are:

- **Friday, June 30 (6:30pm):** First Close Deadline: **We strongly encourage departments to have all of their entries posted before the First Close Deadline.**
- **Friday, July 7 (5:00pm):** Deadline for departments to make entries.

Use this [link](https://afr.fo.uiowa.edu/calendar/fiscal-year-end-close/year-end-fy24-close) for the University Closing calendar. <https://afr.fo.uiowa.edu/calendar/fiscal-year-end-close/year-end-fy24-close> This is the new link to insert.

Biweekly payroll for June and July:

- **Period May 26 – June 8:** must be received by the Payroll Office no later than **June 11 5:00pm**, will be charged against period 12 FY24. Payroll checks will be dated and issued June 18. **Please submit ETRs as soon as possible to help Payroll Office facilitate the process.**
- **Period June 9 – June 22:** must be received by Payroll Office no later than **June 25, 5:00pm**, will be charged against period 1 FY25. Payroll checks will be dated and issued July 2 and accrued centrally for financial reporting purposes.
- **Period June 23 – July 6:** must be received by Payroll Office no later than **July 9, 5:00pm**, will be charged against period 1 FY25. Payroll checks will be dated and issued July 16. The payroll amounts for June 23-30 will be accrued centrally for financial reporting purposes.

**Note:** Questions may be directed to Terri Hein at 335-2374 or [terri-hein@uiowa.edu](mailto:terri-hein@uiowa.edu).

Retroactive Accounting-Only COS & PayCV Cost Transfer Justification (CTJ) processing by Payroll Services, GAO and AFR: (Link [to Grant Retroactive CTJ > 90 days](#) form; Link to [Non-Grant Retroactive CTJ >90 days](#) form)

- **Period 12:**
  - All **retroactive Accounting-Only COS** forms must be submitted in the HR Transaction system and complete through workflow by **June 24, 5:00pm**, for Payroll Services to process the COS and complete the associated PayCV entries in period 12, FY24.
  - Any **PayCV Retroactive CTJ > 90 days** forms (links above) must be submitted to Grant Accounting or AFR by **June 27, 4:00pm**, to complete the PayCV entries in period 12, FY24.
- **Period 13:**
  - All **retroactive Accounting-Only COS** forms for FY24 pay periods must be submitted in HR Transaction system and complete through workflow by **July 9, 5:00pm**, for Payroll Services to process the COS and complete the PayCV entries in period 13, FY24.
  - Any **PayCV Retroactive CTJ > 90 days** forms (links above) must be submitted to Grant Accounting or AFR by **July 10, 5:00pm**, to complete the PayCV entries in period 13, FY24.
- **Period 14:**
  - All **retroactive Accounting-Only COS** forms for FY24 pay periods must be submitted in HR Transaction system, complete through workflow, and approved by the Business Officer (ad-hoc as needed), and an email request to process the COS and complete the associated PayCV entries in period 14, FY24 sent to **Stacey Halverson** ([stacey-halverson@uiowa.edu](mailto:stacey-halverson@uiowa.edu)) in Payroll Services by **July 15, 5:00pm**. Any completed forms or requests submitted after this date will post in FY25.

- Any **PayCV Retroactive CTJ > 90 days** forms (links above) must be submitted to Grant Accounting or AFR by **July 15, 5:00pm**, to complete the PayCV entries in period 14, FY24. Any entries submitted after this date will post in FY25.

## Summer Session 2024 Reminder

Appointment information, including instructions have been sent out. Summer session appointments should be made to 050-11-xxxx-xxxx-54170000-xxxx-000-00000-10-0000. The following schedule represents the standard appointment periods for Summer 2024:

- 4 Week session: 5/13/24 - 6/07/24: pay prorated by calendar days and issued on 6/1/24 and 7/1/24.
- 6 Week I session: 5/13/24 - 6/21/24: pay prorated by calendar days and issued on 6/1/24 and 7/1/24.
- 8 Week session: 6/10/24 - 8/2/24: pay prorated by calendar days and issued on 7/1/24, 8/1/24 and 9/1/24.
- 6 Week II session: 6/24/24 - 8/2/24: pay prorated by calendar days and issued on 7/1/24, 8/1/24 and 9/1/24.
- 12 Week session: 5/13/24 - 8/2/24: pay prorated by calendar days and issued on 6/1/24, 7/1/24, 8/1/24 and 9/1/24.

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 two equal installments on 6/1/24 and 7/1/24.
- 6 Week II and 8 Week session: First, let the form do the standard calculation. Then, take the sum of the amounts for the 7/1/24 and 8/1/24 payments and divide by 2. Click the exception button and then distribute that amount equally on 7/1/24 and 8/1/24. The 9/1/24 payment will remain the same as what the system calculated.

May and June salary/fringe will be “funded” during closing (Period 13). Accounts may have a negative free balance until the allocation is made. After the Period 13 allocation, the summer session accounts should have a free balance of zero for year end. July and August salary/fringe will be funded within the September/October period.

Please contact Jeff Donoghue ([jeff-donoghue@uiowa.edu](mailto:jeff-donoghue@uiowa.edu), 335-2605) with any questions.

## CLAS Policies and Procedures Updates

Please use this link to see the CLAS policies that have been updated recently: <https://policy.clas.uiowa.edu/whats-new>.

### Contacts

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

**Jeff Donoghue** – 335-2605 (Staff & Visitor Budget, Chart Field Requests, Summer & 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 & Computer Replacement)

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

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