

**Business Process Advisory Group**  
**August 5, 2005**  
**Winder Board Room 300 Park**

Attending:

Angela Brown, Col. of Science  
Bob Turner, Nursing  
Catherine Coda, Col of Nursing  
Gary Gledhill, Research Accounting  
Jim Urry, ACS  
John Levandowski, FIS  
Marilyn Cox, CSBS  
Matt Hunter, Biology  
Shari Zinik, Chemistry  
Michelle Denkers, Benefits  
Ray Lacanienta, ACS  
Erica Nuttall, Benefits

Ann Blanchard, Undergrad. Study  
Bobbie Harris, Engineering  
Dave Bardsley, Pharmacy  
Jackie Byrd, Col. Of Education  
John Downing, Accounts Payable  
Laura Howat, Tax Services  
Marv Hawkins, ACS  
Nancy DeMello, Math  
Vickie Parker, Payroll  
Monica Stapley, Com. Sci. Disorders  
Delva Hammes, Social Work

**Follow-up From Last Meeting:**

Minutes Approved.

**Benefits Office:**

Michele Denkers (581-6637) from the Benefits Office passed out a Benefits Organization contact sheet to the group. Erica Nuttall from Benefits is over the Hospital. If you are trying to contact the Benefits Office and have to leave a message, your call will be returned the same business day. The Benefits Office will review and update the Policies and Procedures on FTE for retirement. There was a concern on inconsistency with the Benefits Office. The Advisory Group would like to see some training in the benefits area. The Benefits Office is currently working on training modules for Benefits Office employees due to turnover within the department. The Benefits Policies and Procedures were last updated in January on Early Retirement. The Benefits website (<http://www.hr.utah.edu/ben/eBen/>) is helpful in answering questions. There has been a change in early retirement: 5 years at age 60. There is a table on the Social Security website on retirement ages. Questions on Faculty retirement should be directed to Michelle Denkers. The Benefits Office will put together a flow chart and have Vickie Parker distribute. The Advisory Group would like to see changes on Benefits Policy posted to AFS News on the CIS website.

**HR/PR Open Discussion:**

The Advisory Group is not clear on the Payroll Department changes. PAN forms, Payroll Issues will stay with Payroll. Tax Services will be taking the accounting portion which would include: Tax withholding, Interaction with IRS for payroll deposits, non-benefit deductions such as US savings bonds or charitable deductions, garnishments and court judgments. The Tax Services website (<http://www.tax.utah.edu/>) has all the information on Payroll tax issues along with information on who to call. Payroll will still handle overpayments (581-7873). This phone number is subject to change due to the move to Wakara. Tax Services and Payroll Accounting will also handle W-2's and tax refunds. PAN forms must be delivered in a campus envelope and properly addressed to insure it gets delivered to correct person.

New Foreign employees can apply for a social security number as soon as they come to the University to work after they receive their work authorization letter from the International center. Payroll Accounting only needs the receipt that they've applied for a social security card to get a temporary I.D. so that the employee can be paid. Mark Patterson issues the temporary I.D.'s. If the employee has a treaty and doesn't have taxes withheld, the employee absolutely has to have a social security number before we can put the treaty on their pay record.

A Web-based Payroll Check/Advice Roster is being worked on.

**Grants Project Information Sheet:**

Gary Gledhill is holding a meeting on August 8<sup>th</sup> to discuss the PeopleSoft Grants module and anyone interested can attend. Also to be discussed in the meeting is what should be included in the Project Information sheet (Bucksheet). Currently the Bucksheet is being sent out to the P.I.'s by paper. It was requested to have the Bucksheets sent to administrators as well. On the Research Accounting website ([http://www.utah.edu/research\\_accounting/](http://www.utah.edu/research_accounting/)) you can look at every project that has been set up. The Bucksheet may eventually be sent out electronically. Currently every project has only one P.I., but PeopleSoft will allow us to list all Co-P.I.'s along with the main P.I. On the PeopleSoft system we will be able to get a list of all P.I.'s associated with a project.

Scholarships/Fellowships payments will be sent out on the first working day of the month instead of the sixth working day of the month. This change will take place in September. The date change will enable the students to receive their money in time to pay their fall tuitions. Since the checks will be created five days earlier, the colleges will have to submit the Scholarship/Fellowships forms to Research Accounting five days earlier. So instead of having the reports into Research Accounting by the 20<sup>th</sup> of the month, they will have to be in by the fifteenth.

**Open Discussion:**

There was great concern regarding Payroll moving to Wakara. The Advisory Group believes it is not cost effective because of spending so much work time traveling back and forth to deliver/pick-up special checks, PAN forms, etc. It was suggested to have a satellite office in the Park Building possibly manned by one person who could clock in the PAN forms, has special checks available for pick-up, answers questions and phones. The same problem goes for the Development Office being at Research Park. It was suggested that these concerns should be made individually to management in Human Resources and Development.

It was noted that there was not additional HR representation (other than Payroll and Benefits) to answer questions during open discussion. At our September meeting, we will discuss who the Advisory Group would prefer to be in attendance at each month's meeting.

***The next Business Process Advisory Group meeting will be  
September 9, 2005, 9-11:00am, Winder Board Room***

*Jenny Fickett: Phone: 581-5975*