

Business Process Advisory Group – May 9, 2014 – INSCC Room 110

Attending:

Alayne Merritt, FBS	Anita Bowler, HCI
Anne Maxwell, FAO	Bob Mutz, ARCH
Bob Schirmer, FBS	Bob Turner, HSD
Clay Postma, UIT	Darrin Robertson, FBS
Dawn Atterbury, FBS	Dean Church, FBS
Elizabeth Woolsey, FBS	Frederick Hon, HU
Glendon Mitchell, FBS	Georgette Kimberly, FBS
Hedy Hu, FBS	Heidi Slack, FBS
Jane Scott, FBS	Janet Ellingson, CHPC
Jared Olney, PED	Jennifer Long-Pratt, FBS
Jessica Kieper, SOM	Jessica Little, FBS
Jim Turner, EIHG	Kami McNeill, SOM
Ken Erickson, FBS	Kevin Ballard, FBS
Kristie Thompson, OSP	Linda Reed, HSC
Margo Bonnette, COH	Marilyn Burton, SOM
Marv Hawkins, USS	Matt Hunter, COS
Matthew Castillo, CFA	Michelle Addison, CFA
Natali Rajcevich, FBS	Sally Petersen, FBS
Samantha Adams, FBS	Sandy Drollinger, OBGYN
Steve Browm, CHEM	Tanis Garcia, FBS
Ying He, FBS	

Sales Tax

Manager Bob Schirmer of Tax Services gave a sales tax presentation, which included information about when sales tax can be charged by selling departments, when purchases can be tax exempt, and the inability to refund the sales tax on personal reimbursements. [Click here](#) for the presentation.

Default Chartfields on Projects

Manager Dawn Atterbury of Grants and Contracts Accounting gave a presentation on default Chartfields on Projects, and when they will be charged. The power point includes several overview and summary slides, as well as links to important information. [Click here](#) for the presentation.

Information gathered during the questions portion of the presentation:

- If interested in a list of default Chartfields, provide Dawn with an Org ID
- Multiple default Chartfields are allowed , and they can be set up by PI (attach to the Proposal ID/Award Number)

Inactive Orgs on Payroll Distributions

Dean Church led a discussion/brainstorming session about how to avoid problems with inactive Orgs on payroll distributions. Before inactivating an Org, be aware that Orgs “live” in many places. Be sure to look at all employees and update their distributions. An easy way to monitor transactions is by using Journal Detail Search—the report will show if an Org does not match in the Chartfield by way of a hover; and the two Org columns won’t match, just upon visually comparing.

Financial and Business Services Current Projects—“Grant Authority”

Dean Church gave a summary of the FBS projects currently under way:

- PCI Compliance
- F&A Study
- New Scholarship Process
- Business Intelligence—reporting tools and analytics better than what is currently available
- Single Use Credit Card—new way of paying vendors
- Procure to Pay (P2P) process improvements: “Grant Authority” is a part of this

Grant Authority is currently in the design process, and is a complete overhaul of the signature card process. The new process will have two parts:

- It will basically allow someone to electronically request that an authorized alternate be added to an Activity or Project, and the Account Executive will then be notified to approve. The functionality will allow authorized alternates to be added/removed on multiple Activities/Projects, as well as multiple authorized alternates added/removed on just one Activity/Project.
- Separately, signatures and initials will be captured in the system. When someone is requested to be an authorized alternate, the system will look to make sure there is a signature for this person. These signatures can be changed when necessary.

Next BPAG Meeting—June 13, 2014