
**Attending:**

Alicia Geesman, CVRTI    Angela Sullivan, CFA  
Ann Blanchard, UGS    Bob Mutz, ARCH  
Bob Schirmer, FBS    Carl Larson, FBS  
Cary Lopez, USS    Darrin Robertson, FBS  
Dawn Atterbury, FBS    Dave Bardsley, PHARM  
Dean Church, FBS    Hedy Hu, FBS  
Jake Pickett, SOM    Jayci Minjares, FBS  
Jennifer Hammond, SOM    Jennifer Long-Pratt, FBS  
Jeri Schryver, ICSE    Jessica Kieper, SOM  
John Levandowski, FBS    Judy Chan, FBS  
Kami McNeill, SOM    Kellye Potter, PED  
Ken Erickson, FBS    Kevin Cook, HUR  
Kim Lee, FBS    Kristie Thompson, OSP  
Laura Howat, FBS    Leslie Bigler, CMES  
Louise Hall, LIB    Marcia Cook, CSME  
Margo Bonnette, COH    Marilyn Burton, SOM  
MARV Hawkins, USS    Matt Hunter, COS  
Nora Ishihara, KUED    Pam Mollner, IA  
Reena Pamarthi, FBS    Sally Petersen, FBS  
Sue Wolfe, FBS    Susan Shult, FBS  
Ying He, FBS

**BPAG – Mission**

An overview of the BPAG meeting was given. Many of the improvements to business processes have been suggested or discussed in BPAG. BPAG is an open group where participation is encouraged. [Click here](#) to learn more about BPAG.

Due to the IT commitment to the Kuali Student implementation, there is limited IT resource available for the next several months. Consequently, Financial Solutions is leading two “discovery” initiatives that we are confident will improve overall business process. 1. We are engaged in a formal review of the “Procure to Pay” business processes, specifically to gain a greater understanding of the various enablers (and disablers). These factors include People, Facilities, Workflow, Policy, & Technology. 2. Understanding the
data that is behind business decisions and the relationship of the business processes that maintain this data. We are modeling the various datasets to better leverage the institutional Business Intelligence (BI) tools. We are using the IT resource moratorium as an opportunity to be better prepared the ever-changing environment that is the University of Utah.

Dawn Atterbury was introduced as the new Manager of Grants & Contracts Accounting.

2013 Year End Update - Tax Services

Tax Services presented year-end tax information including:
- Forms
  - W2 – only 42.8% of employees are signed up for electronic W2
    - SSN – each year there are SSN number mismatches with the IRS
  - Form 1099
  - Form 1098 T
    - See Pub 970 (IRS)
  - Form 1042S
- NRA Treaty Renewal is complete
- Updating Taxable Wages
  - Gift Certificates
  - Moving Expenses

View the outline here.

GCA/OSP Briefing

OSP and GCA briefed the group on Project setup Processes:
- Award Setup
- Role of PI
- Travel
- Effort Reporting
- Closeout
- Overdrafts and Default Chartfields

View the outline here
**EDR (Effort Distribution Report)**

EDR is now available for all to use. [EDR User Guide](#), [EDR Quick Reference](#) and [Executive Summary](#) are available on the [EDR Instructions page](#). EDR timing was explained using the [Quarter to Date EDR Cutoffs](#) diagram.

For those situations where EDR cannot be used, the current Payroll Reallocation PDF form will continue to be used. An updated flowchart that shows when Grants and Contracts Accounting and/or Management Accounting and Analysis are involved was shown. For those situations where EDR cannot be used, the current Payroll Reallocation PDF form will continue to be used. An updated flowchart that shows when Grants and Contracts Accounting and/or Management Accounting and Analysis are involved was shown. View the [flowchart here](#).

**EOR (Evidence of Review)**

New updates to EOR are being worked on including:

1. The “Blank” radio button will be changed to “Not Reviewed”
2. The “Roll-up” check box will only be used with Organization
3. The GUI interface will be readable on portable devices
4. If a terminated person has reviewed an Activity/Project in the past, their name will appear.
5. The Account Executive search will also search PI’s.

Also under consideration, especially when the list is large:

6. Filtering or the ability to select a range of Activities/Projects
7. Having the three actions buttons more readily accessible

**Open Discussion**

There continues to be a lot of interest in the notion of annotating the journal detail management report with additional information that explains the expenses. Most BPAG members agreed that a central service to image PCARD receipts that would also be accessible would be of great value. The group would also like to discuss ways to improve reconciling the PCARD charges at some point in the future.

*Next BPAG Meeting – December 13, 2013*