
Attending:

Alayne Merrit, FBS
Angela Simmonds, COS
Ann Buffington, ADM
Bruce Newmann, UNP
Chuck Piele, IA
Clay Postma, UIT
Darrin Robertson, FBS
Dean Church, FBS
Fed Hon, HU
Jane Scott, FBS
Jared Olney, PED
Jennifer Zenger, SRI
Jim Urry, UIT
Josephine Rudd, FBS
Julia Harrison, CHPC
Kay Wilden, BIOCH
Ken Erickson, FBS
Kristine Van Ausdal, FBS
Magali Coburn, SCI
Margaret Tennant, DNEUR
Mark Patterson, FBS
Mary Snow, USS
Matthew Castillo, CFA
Michelle Addison, MUSIC
Rachel Staheli, NURS
Rose Simper, ED
Sandy Hughes, BUD
Scott Patten, FBS
Susan Dudley, FBS
Tanis Garcia, COMP
Utahna Miller, DESB
Wendy Kwan, SOM
Yuka James, LAW

Ambra Gagliardi, LIB
Ann Blanchard, UGS
Anne Maxwell, FAO
Carol Bierschwale, ARCH
Colette Brown, FBS
Craig Merritt, FBS
Dave Bardsley, PHARM
Dennis Laros, PSYCH
Hedy Hu, FBS
Janet Ellingson, CHPC
Jennifer Long-Pratt, FBS
Jim Turner, EIHG
Joan Gregory, EHSL
Judy Chan, FBS
Karren Nichols, SUS
Kelly Peterson, FBS
Kimberly Adamson, HSC
Linda Jensen, OPHTH
Marcia Cook, CSME
Marilyn Burton, SOM
Marv Hawkins, USS
Mary Ann Howard, SCI
Megan Warren, NURS
Niloofer Bakhti, EHSL
Reena Pamarthi, FBS
Runar Boman, FBS
Sarah Alexander, BIOCH
Shelly Kruger, CPPA
Sydnee Scarborough, SW
Tran Trang, EHSL
Victoria Medina, MPA
Ying He, FBS
**Project Budget Detail**

A new report (Proj Budget Acct Entry Details) has been created in the Financial Information Library that shows all of the Project budget detail entries. The account description returns in the Description column. On Subawards, if GCA had the correct information at entry time, that information will also appear in the description. This report lists all of the budget entries Project-to-date, and is located in the “GRANTS/CONTRACT” folder.

**Group Conferences and Catering**

New checklists and a new webpage have been created to help with scheduling Group Conferences and Catering. If the caterers total cost is above $5,000, submit a requisition to Purchasing. The checklists will help with the requirements for catering or holding a conference. The page can be found by clicking on the Group Conferences and Catering link on the Purchasing home page.

**Electronic W2**

Employees can sign up to get their W2 faster by selecting to receive the W2 electronically. Advantages are:

- Employees will be able to access the W-2 up to a week earlier, because they will not have to wait for it to be delivered in the mail.
- Employee’s sensitive personal information will not be sent through the mail.
- Green – natural resources are saved by not printing and mailing W-2 forms.
- Budget Savings – In these tight budgetary times, this will have a positive impact on the budget of the University.
- Employees may still print the PDF if a printed copy is desired.

Departments can find out who has elected to receive the W2 electronically by running the “W2 - Electronic Consent” report in the CURR EMPLOYEES folder of the Financial Information Library.

**ePAR**

The ePAR rollout has been hugely successful and has already changed our ability to manage and more effectively drive the certification of effort reporting each quarter to be compliant with the University’s effort reporting policy. Metrics for the ePAR application were presented. Highlights include:
• ePAR compliance was at 72.4% for last quarter compared with 60.6% for the previous quarter.
• Compliance had been below 30% prior to the ePAR implementation.
• Only 6.5% of PARS had not been started.

Click here to view the complete metrics.

Paper PAR’s and ePAR’s submitted more than 120 days after they have been released that are returned with changes will no longer be automatically processed. If costs need to be moved on or off a project, the Cost Transfer Decision Tree shows the correct method to transfer the funds.

Annotating Management Reports

Wouldn’t it be cool to make annotations on the Journal Detail of Management Reports? Plans are being made to add this feature in the future. The reviewer of Journal Detail could leave notations regarding the lines that had been reviewed. Details and requirements are in process and more should be known next year.

UShop

Feedback is very important to Financial & Business Services. The UShop team has gathered feedback from departments. The University of California San Diego (UCSD) was invited to campus to evaluate our process. They have been using SciQuest (the platform UShop is built on) for 10+ years. SciQuest was also invited to visit and evaluated how the software has been implemented. Information gathered from departments, UCSD and SciQuest was presented.

Highlights from feedback:

• University financial approvals integrated with electronic workflow
• Catalog supplier marketplace very easy to use
• Need more punch-out catalog suppliers
• Non-catalog form cumbersome to use
• Implement search functionality immediately.
• Provide more clear guidance to campus departments regarding when to use a Pcard, and when to use UShop.
• UShop pricing sometimes not competitive
• UShop team is comprised of a committed team of individuals, with a breadth of experience.
• The UShop training program and content is above average.
• Implementing eProcurement is a long-term project.

Refining plan highlights:

• Catalogs will be expanded, with more punch-out catalogs added, and hosted catalogs implemented.
• Product search will be enabled, and implemented in a way that facilitates easy product searching across many catalogs.
• A UShop user group will be created, establishing partnerships with key departmental representatives.
• The UShop Help Desk will be expanded and improved.

Click here to view all the feedback and the Refining plan.

Next BPAG Meeting — December 11, 2015