College/Division Administrator Meeting
Room 302, Melcher Hall
October 11th, 2018 - 9 AM to 11 AM

Agenda

Esmeralda Valdez, Executive Director University Services – Copy, Print and Delivery Services

- Introductions:
  - Nalan Giannukos, Copy & Print Services Manager
  - Robert Poole, Delivery Services Manager
- Postal and Printing Services is now Copy, Print, and Delivery Services
- Copy & Print Services has a new online tool, visit website: http://www.uh.edu/af-university-services/printing-and-postal/uh-printing-online/
  - Available since August 2018
  - Similar to services offered by national copy shops
  - Uses Cougarnet single sign-on
  - Can store regular and repetitive orders
  - Can upload documents
  - Offers image previews
  - Calculates a price unless it is a special order
  - Regular ordering methods, such as by phone or email, are still available
  - System currently does not do budget checking, but that is planned for the future
- Copy & Print Services also does promotional items; visit the website- https://www.promoplace.com/uhprinting/
- Copy & Print Services now offers a price match. They will match any job, including promotional items
- Why should you use Copy & Print Services?
  - They are a UH department and will go the extra mile to help when you have an urgent need
  - They are experts in pricing, quality, and timed deliver
  - Bidding is not required because they are a campus department
  - If they can't do the job, they will bid it out for you
- Delivery Services is issuing an RFP for intelligent lockers and mail services
  - Intelligent lockers will be lockers where a package can be left for you, and you will receive notification and then pick it up at your convenience.
  - Intelligent mail will notify you of your mail and you can decide if you want it delivered or disposed of
- Delivery Services is working with Human Resources and Information Technology on having information in PeopleSoft regarding physical location of personnel updated. The updates are manual and time consuming, so their goal is to obtain updated locations and feed them into HR, which then feeds to Delivery Services.

Carlos Luis, HR Business Partner – ePerformance Updates and Timeline

- HR is setting up training sessions for Colleges and Divisions and will send out an email with available dates. Training is for all staff.
- Training is for ePerformance and will cover things like what it is, why we do it, how do you fill out the pages, how to set goals, and how responsibilities are populated.
- ePerformance training will also focus on doing self-evaluations
    - Training will cover how to do self-evaluations and how to communicate your justifications to your supervisor.
- In addition to the training, there is information on the HR website, including flowcharts, videos, and step-by-step instructions.
- Self-evaluations are due on December 1. Although not mandated by policy or merit eligibility at this time, HR recommends that all staff complete the self-evaluation process for CY2018. Self-evaluations are required because it is necessary to ensure that communication regarding performance and expectations occurs.
- HR reviews ePerformance with scores of 1 and 5, and also those that have key words in the text such as "FML"
- ePerformance is required for any employee that started before 9/1/2018. ePerformance may be conducted for persons hired after that date.
- CY2018 ePerformance due date for completion is February 5, 2019.
- CY2019 ePerformance documents will be created and made available tentatively by February 5, 2019.
- New employees should have ePerformance documents created on hire. If you have a new employee that does not have ePerformance documents after 2 weeks, contact HR for assistance.
- HR will send out information on training sessions and the information available on their website.
- HR will send out information on self-evaluation requirements.

Margaret Busch, Payroll Manager – W-2 and end of year updates

- Please remind employees that they need to validate their Social Security Number, Name (spelling), and address.
- Please remind employees to consent to receive their W-2 and 1095 form electronically.
    - E-delivery will ensure that it won't be lost
    - They will get the forms faster
    - E-delivery will save the university money
- Payroll will send communications to employees to remind them about verifying their information and providing consent for electronic delivery.
- The B1225 payroll will finalize while the University is closed for the holiday break
    - The payroll pays on January 4, 2019
    - Payable time and absences must be approved before leaving on the 21st or during the holiday break.
- Payroll will send information on the B1225 payroll process and timeline.
- There have been updates to the direct deposit process in the HR system that makes it easier to make updates.

- Payroll will be making changes to the vacation payout process. The process is currently manual, primarily by email, and involves a lot of back and forth. In the future, HR will take over the process. Departments will need to have all absences approved in the system before the terminating ePar is submitted, as Payroll will not be able to adjust vacation payout.
- Payroll will develop metrics for Colleges and Division. Metrics will include: late ePar transactions, unapproved time and leave, the number of supplemental payrolls, and batch approvals require by Payroll.

Samantha Yurus, Accounts Payable Director & Eric Sanchez, Travel Coordinator – Travel Guidance Published

- Updated travel guidelines are on the Travel Website
- Accounts Payable's Travel team receives a lot of questions on travel, so they developed written "frequently asked questions" for the website to help travelers and business people.
- The FAQ page addresses how to identify if a trip is primarily for business or personal purposes, how to provide additional information to the Travel Team, what to do in certain situations, and other common questions.
- Key points
    - Per IRS guidelines, the first decision point is whether the trip is primarily for business purposes or primarily for personal purposes.
        - Business days must exceed personal days for the trip to be primarily for business purposes
    - Days that are counted for the calculation of business versus personal are: all business activity days, all personal days, and travel days contiguous to a business activity day where it is reasonable that travel would not occur on the same day as the business activity day. This is the general rule, but there are special situations; travelers should contact the Travel team with questions.
    - The University does not have a per-diem. Actual meal costs must be claimed, regardless of trip purpose, source of funding, or any other consideration:
        - Meals may be reimbursed up to the federal meal and incidental rate without receipts. Travelers are responsible for keeping track of, and accurately reporting, their own meal costs.
        - Meals may be reimbursed at a higher cost than the federal m&i rate, but receipts are required.
        - If travelers submit meal expenses that equal the m&i rate, the Travel team will return the reimbursement with a request for an explanation of how the cost of meals exactly equaled the m&i rate on each day. This is because when we are audited, we are asked this question.
- There is also a new form for providing additional information. This form is to help the Travel team understand the travel when activities are not self-evident. The more relevant information that the Travel team has, easier it is for them to process the travel reimbursement. The form is located at: http://www.uh.edu/administration-finance/ap-travel/travel-forms/travel-justification-form.pdf.
- The page is located at: http://www.uh.edu/administration-finance/ap-travel/domestic-travel-faq/
- Accounts Payable has published standard mileage on their website, at http://www.uh.edu/administration-finance/ap-travel/helpful-travel-information/. This is for

non-travel mileage, reimbursed on vouchers. These standard distances can be used without providing printouts from web-mapping services.

Bill Spindler, IT Business Services Director

- Texas Administrative Code (TAC) 216 requires that the University have information resources project management practices that are approved by the Chancellor, use standard methods, and are documented in a single reference source.
- Campus policies also require Information Technology (IT) project management practices.
- IT is responsible for the institutions information resource project management system's procedures and software.
  - IT has policies and procedures
  - IT uses a software called PLANVIEW
- The Department of Information Resources (DIR) requires that IT track projects that are
  - Over $1M
  - Take longer than 1 year
  - Involve another state agency
  - OR substantially alters the work methods or delivery of services
- UH IT requires tracking of projects that are over $100K or are of a critical nature

Karin Livingston, AVP for Finance & Controller

- We only had one vendor bid on our solicitations at the Spot Bid Fair on September 20th
  - This was the first time for this event, we will hopefully have more responses next time
  - Purchasing and HUB sent notifications regarding the bids; please let Karin Livingston know if you have a solicitation and were not notified of the outcome
- Sharp Contract is being renewed for 2 additional years, now expires July 2021
- Comptroller rules require that state P-Cards list the vendor ID of the original vendor in the voucher that we do to pay Citi
  - We are looking at options, but do not think it is feasible to ask users to request vendor set up forms in many cases, nor do we think we can meet the deadline of trying to obtain the forms in the short turnaround time that we have to pay.
  - We may have to switch to a reallocation process where a local card can be used and the funds be reallocated to a state source, as this will allow time to obtain vendor set up.
  - Karin Livingston will find out the Comptroller's position on the reimbursement of receipted expenses on state funds.
- Karin Livingston will ask Risk Management to provide guidelines for what items have to be approved by them – all contracts, non-contract POs, etc.
- Karin Livingston will ask Peggy Levy to come to a CDA meeting and provide us with an overview of the policy update process, including how policies are sent out for review.