



College of Arts & Sciences Managers' Meeting

Wednesday, August 14th

10:30 a.m. – 11:30 p.m.

Toy Lounge, Dey Hall

Welcome & Announcements: Ashante Diallo, Associate Dean for Human Resources

- Rachel Barrbara has joined the Department of African, African American and Diaspora Studies as their new Department Manager effective Monday, August 12th.
- Kimberly Wallace, Finance Support Specialist, joined the Business Operations team on Monday, July 15th.

Student Fees: Beverly Wyrick, Director of Finance & Administration, Graduate School

Budget Updates: Kate Henz, Senior Associate Dean, Operations & Strategy & Joe Daley, Budget Analyst

Commitment transfers

- First commitment load of the year was in early August.
 - Allocated most carryover and discretionary commitments from the SADs
- We are planning to start processing commitment imports twice a month now that Kim Wallace has joined our team. In September, the commitment imports will be processed every other week instead of once a month.
- You may review your committee transfer reports in ASR. Additionally, if you have any allocations that you are unsure about, you may view this information in ASR.
- We are currently working on start-up, phased retirees, and course releases. Professorships and permanent State adjustments will be next.
- IB carryover were transferred at the end of July. Kate Henz and the SADs are currently working on the reallocations for this year.
- IB reallocations, which serves as an indicator on who you may hire in the incoming year on state funds, will be processed differently this year. IB reallocations will be submitted along with the position authorization forms this year. Additional updates regarding the change in process will be sent out within the upcoming few weeks.

Payout and reinvestment process is on-going

- Processed on a mass transfer, so any departments late to submit slow down the process for everyone.

- Please have ASF (C0XXX) endowment decisions to Larry by 8/16; expendable acknowledgements were due 7/30.

Fixed-term pool

- Starting this year, we'll be moving all permanent (3 to 5 year contract) teaching track fixed-term faculty onto program C1304. This will help differentiate from T/TT faculty paid on main State and IB.

Sources & Stewardship Training on Thursday, August 15th – Please reference the email that was sent out to all department managers on Tuesday, August 13th. The sources and stewardship reference guide will be posted on the CASBO website no later than Friday, August 16th.

If you have questions, please reach out to your Budget Analyst.

Next Managers' Meeting: Wednesday, September 11th from 10:30 a.m. – 12:00 p.m.

Mandatory Fees Payment Policy

Beverly Wyrick, The Graduate School

Fall 2019

Payment of Mandatory Fees

- Beginning Fall 2019 – the mandatory fees charged to students will be charged to the stipend funding source
- New policy has the full support of the Interim Chancellor and Executive Vice Chancellor and Provost, and University deans
- Begins to address inequities in financial support that exist among graduate students
- Improves Carolina's competitive position

Payment of Mandatory Fees

- The new policy mirrors eligibility requirements for payment of instate tuition, tuition remission, and health insurance.
- Students qualify if they are:
 - Appointed as teaching assistant, research assistant, fellow/trainee
 - Receive the minimum stipend and tuition support
 - Have an enrollment status of full-time
 - Are in good standing in their graduate program

Payment of Mandatory Fees

- The funding source of the stipend will be responsible for full amount of mandatory fees
 - Exceptions are noted below
- It is not permissible to increase a student's stipend in order to pay full amount of fee or any portion of the fee
- It is not permissible to charge any portion of an eligible student's fee to the student

Implementation Plan

- Implementation Plan for **STATE** funded students only:
- Year One (AY 2019-20): Provost office covers 100%
- Year Two (AY 2020-21): Provost office covers 50%, Grad School 25%, school/program/unit 25%
- Year Three (AY 2021-22) and beyond:
 - Provost covers 25%, Grad School 25%, school/program/unit 50%
- Implementation Plan for **NON-STATE** funded students:
- Beginning AY 2019-20, source of stipend will cover fees for qualified students (same eligibility as instate awards).
- Grants can pay only allowable fees as designated by OSR.
- List of allowable fees on grants can be found here, [fees allowed on grants](#)
- Departmental source must pay remainder of fees

GradStar Updates

- GradStar has been updated to accommodate new policy
- System works same way as instate tuition button works
- Year 1, The Graduate School will work with the Provost's Office to ensure charges are made to correct funding sources for state funded students
- Year 2 and beyond, The Graduate School will work with Dean's Offices on funding the school/program/unit portion
- New program code, EJ132, used to track fee payments on state funds

Term 2019 Spr Empl ID 700071887 Jane Smith
 Career Graduate **Create Instate/Remission Awards** Dept 311500 Degree PHD English and Comparative Lit

Summary and Requirements Data

Credit Hours			Remission Funding		
Total Bill Units	Actual Bill Units	Funding Pct	User Type	Remission Budget	
3.00	3.00	100	<input type="text"/>		
Acad Aff Inst			Remission Department	<input type="text"/>	
Total Instate	Remission Amt	Fees	Citizenship	US Citizen	Residency NRES
2560.75	4302.75	984.51			
Tuition/Fees Balance	Instate Remission Dates	Degree Stipend Requirements	GradStar Student Lookup		

Service (HR, Payroll, Voucher) and Non Service (NS)

Award Type	Funding Dept	Fund	Account	Source	Project ID	Program	Job Code	Amount	Status	Description		
1	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>					<input style="background-color: #ffff00;" type="button" value="+"/>	<input type="button" value="-"/>

Instate (INS) and Tuition (TUI)

Award Type	Funding Dept	Fund	Account	Source	Project ID	Program	Amount	Status	Description		
1	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>				<input style="background-color: #ffff00;" type="button" value="+"/>	<input type="button" value="-"/>

Fees (FEE)

Award Type	Funding Dept	Fund	Account	Source	Project ID	Program	Amount	Status	Description		
1	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>				<input style="background-color: #ffff00;" type="button" value="+"/>	<input type="button" value="-"/>

Help and Resources

The Graduate School website:

[GradStar policies](#)

Questions:

GradStar policies/processes: gradstar@unc.edu

Student Accounts questions: funded@unc.edu

Help Tickets:

For technical assistance, <http://help.unc.edu>, choose ConnectCarolina/Student Admin/GradStar

Sources & Stewardship Quick Reference Guide

Sign in to <https://srcs.oasis.unc.edu> using the Common Authorization Tool. You will then have the option to filter and sort your Sources.

The screenshot shows the 'Sources & Stewardship' interface. At the top, there is a 'SOURCE' tab. Below it is a 'Filters' dialog box with two search fields: 'search source' and 'search purpose'. The main area displays a table of sources with columns: [SOURCE], [DESIG. #], [SOURCE RESTRICTION], [BUDGET CATEGORY], [OWNING UNIT], [BUS. UNIT], [STEWARDS], and [DATE CREATED]. A list of sources is shown, including source numbers like 16291, 16779, 46565, etc., and their corresponding designations and restrictions. At the bottom, there are filter selection counts for each column, a note to clear filter selections, and a 'Results per page: 25' dropdown with a magnifying glass icon and a 'reset' button.

You can search a Source by typing in either the Source number or Source name. The system defaults to using Source numbers. If you do not have the source number or prefer to search by name, you can click on the “name” link located under the Source column to display PeopleSoft short names for your Sources.

In the second column, you can also search by Designation Numbers. This is the identifying number utilized in DAVIE, the university’s donor database.

To the left of the “Search Source” field, you can use the “Search Purpose” field to conduct a keyword search of the purpose language in your sources. This can be helpful if you are looking for funds that support a specific area or discipline (ie. faculty or botany)

Once you have selected your filters, click on the green magnifying glass in the bottom righthand corner to display results.

Fund results appear in list form under the “Filters” dialog box. To view details for your selected Source(s), click on the small arrow to the left of the result.

Applied Filters: Source [1]: 70285

SOURCE NAME	DESIG. #	OWNING UNIT	DIVISION	SOURCE RESTRICTION	BUDGET CATEGORY	BUSINESS UNIT	SOURCE TYPE	STEWARDS	HAS DONOR	SPLIT	SPECIAL
▶ 70285] Kachergis	101088	[310100] Art - Art History	FAHM	Scholarships		UNIV	END	Y	Y	N	N

TOTAL: [1]

SOURCE NAME	DESIG. #	OWNING UNIT	DIVISION	SOURCE RESTRICTION	BUDGET CATEGORY	BUSINESS UNIT	SOURCE TYPE	STEWARD	HAS DONOR	SPLIT	SPECIAL
[70285] Kachergis	101088	[310100] Art - Art History	FAHM	Scholarships		UNIV	END	Y	Y	N	N
Source Long Name: The George and Joyce Kachergis Studio Art Scholarship Fund											
Budget Category:	Split:	Spec Handling:	Steward:	Date Created:	Reinvest Until:	Estimated Payout:					
	No	No	Yes	mm/dd/yyyy	mm/dd/yyyy	\$5,393.70					
College Comment:	Detailed Restrictions:		Source Purpose:			Special Instructions from CAS:					
			To encourage and promote excellence in undergraduate studio art via scholarships, to be called Kachergis Awards, juried by a student-led panel.								
Donors:											
<ul style="list-style-type: none"> Kachergis , Anne [699188203] Kachergis , Karl [701685908] Kachergis , Peter [701205346] 											
College Documents:											
none											
DAVIE Documents:											
<ul style="list-style-type: none"> 101088-Joyce Kachergis-studio art scholarship.pdf Gift Agreement 2016-08-09 10-1088-070285.pdf Gift Agreement 2013-07-05 											
Stewardship Reports:											
<ul style="list-style-type: none"> Kachergis_Anne.pdf Usage Report 2019-02-22 Kachergis_Karl.pdf Usage Report 2019-02-22 Kachergis_Peter.pdf Usage Report 2019-02-22 Kachergis_Anne.pdf Usage Report 2017-10-04 Kachergis_Joyce.pdf Usage Report 2017-10-04 Kachergis_Karl.pdf Usage Report 2017-10-04 											

In the expanded view, you have access to the following read-only information:

Estimated Payout: This number is for informational purposes only and is meant to give you an approximation of the size and estimated payout for endowment funds in the current academic year. *It does not automatically reflect the amount available to spend.* (Note: this field only pertains to endowment funds. Expendable and departmental accounts will display an estimated payout of \$0.00).

College Comment/Detailed Restrictions/Source Purpose/Special Instructions: These fields are used by the Dean’s Office and the Arts and Sciences Foundation to share specific instructions or details relevant to the fund. Information that may be included in these fields could pertain to reinvestment instructions, donor preferences not indicated on the gift agreement, and other special handling instructions. The Source Purpose field should match the language in the fund’s gift agreement.

Donors: This area contains a list of all individuals stewarded on the fund by the Arts and Sciences Foundation. This is most often either the donor(s) or family members of the donor(s).

College Documents: This area is designated for any additional fund-related documents that are on file in the Dean’s Office.

DAVIE Documents: Links to the official fund documentation found in DAVIE are located here. This includes gift agreements, fund authorities and amendments. If there are multiple versions of fund documentation, you should adhere to the document that was signed most recently.

Stewardship Reports: PDF copies of previous stewardship reports are available going back several years. In previous years, the donor relations staff emailed these reports to department chairs and managers as they were mailed. Going forward, letters will instead be posted here for your convenience. This will give you access to all letters without the hassle of multiple emails and prevent the need to save them in your departmental files.

If you have any questions about utilizing this new resource, please reach out to your Budget Analyst.