

Arts & Sciences Managers' Meeting Minutes

May 9, 2012

College Administrative Calendar (Jan Pittman)

Jan Pittman gave a demonstration of the College Administrative Calendar that you can access on the College Intranet. This calendar has a list of important dates, including:

- Chair and manager events (Brown-Bag lunches, meetings, and retreats)
- HR deadlines
- Financial deadlines
- Holidays
- Reminders

The items on the calendar also have more details, which you can see by scrolling to the bottom of the page. These items and details are also sent out as webevent reminders via email.

<http://unccasdo.hosted.webevent.com/cgi-bin/webevent.cgi?cmd=open&cal=cal4>

PeopleSoft Update (Collette Wilshire)

The Dean's Office has almost completed the Program Code mapping with departments, and Collette gave an update on recent decisions and progress with PeopleSoft Financials.

New Department Ids: Please note the list for your new number and review for sub-departments if you have any assigned to you. If you feel that you maintain an entire shadow system to account for what could be coded as a sub-department, please let Collette know and we will review the possibility of adding a sub-dept. with Tammy.

Class Code List: We provided a list of the current Purpose Codes that the College uses. These purpose codes are currently assigned as attributes on our GL and SL accounts. When we transition to PeopleSoft, we will be adding them to the chartfield string as Class Codes. Since these codes are currently attributes and not many of you "use" them, we thought it would be helpful for you to have a list and definitions.

Program Code Summary: This summary sheet lists the current university wide, college specific and "regular" program codes that we will be using. The summary also provides some reference on how the fund codes and the program codes can be paired together in the chartfield string. Remember that the chartfield string has to be unique in order to differentiate between budget coming from the same fund. For instance, all state appropriations will be fund code 12001. In order to identify budget within those university wide appropriations, we use the rest of the chartfield string to be more specific. We accomplish this by using different department numbers, and program codes with that same fund number. This is confusing, so please don't hesitate to ask us questions.

HR Announcements

Becky Williams could not attend the meeting, so Ryan Greenway gave the following announcements in her absence:

- Be sure to review your department HR facilitators listed on the OHR website and make changes by May 17.
- Post-tenure review and untenured faculty review reports are due to Janet Farrell by May 25.
- SPA Performance reviews should be completed by May 31 and new work plans are due by June 30.
- Department HR Facilitators will have from May 21 to June 29, 2012 to complete data entry into HRIS. Facilitators should coordinate with their College/School HR office (if applicable) to confirm who will be responsible for completing the data entry. If the person assigned to enter ratings for the department is not a current HRIS user and/or currently does not have HRIS access rights for the department(s) for this purpose, then the department must submit an HRIS remedy ticket no later than May 11, 2012 in order to grant access for the appropriate individual.
- EPA Non Faculty reviews should be completed by June 30.
- EPA Non-Faculty review report must be submitted to Janet Farrell by July 2.
- Please note that the overload form and faculty leave notification form have been updated on the Academic Personnel website. If you have question about whether you are using the correct form, contact your HR Consultant.

Finance Announcements

- Don't forget to spend state funds
- May 31 – deadline for submitting search reimbursements for faculty searches in FY12
- CCI – we are waiting for the new prices for Apple computers and expect to send out the form in the next several weeks. The tentative deadline will be June 8.
- Submit summer salary and student actions as soon as possible.

Budget planning for FY12 (current year)

- *Spend state dollars*: There is currently \$2.4 mil not spent, much of which is tied up in start-up funds.
- *New Cash deficits policy (trust funds)*: Dean's Office will email your department regarding deficits. If you cannot clear the deficit in a month, you will be required to send Tammy McHale an email explaining your plan to clear the deficit.
- *Telecom network charge (0.54%)*: The Dean's Office will process the budget revisions in March and April to transfer your state funds from the memo sent to you in December. Important – The budget transfer will be future year only.
 - C&G funds – The federal government has not approved the charge yet, and the network fee will be covered by **University (central office)** F&A funds until the charge is approved.
 - Transaction type – the network charge will post as a 62 transaction, which will allow you to submit journal entries to move the costs.
- *Stewardship*: Now open for departments to add recipients and activities with a due date of April 2nd.

Budget planning for FY13

- *Positive outlook*: We are bullish on the budget for next FY. Remember that last year in March we were processing budget cuts for the current FY.

- *Known EPA salary increases process in March:* In order to prevent approvals after July 1, the Dean's Office will process salary/FTE changes in March for promotions, retentions, and other known salary increases. Contact Ryan Greenway if you have not seen a salary/FTE action for any faculty whose promotions have already been entered in EPAWeb or any retentions.
- *Instructional budget 1.5% reversion:* Please plan for a 1.5% permanent reversion of your instructional budget, effective July 1, 2012. **All** of the reverted funds will be redistributed to departments in the College.
- *New Facilities rates:* Confidential recycling will start costing \$8/box starting June 26th.

Common CAS Purpose Code Definitions

- 101 Regular Term Instruction:** This purpose includes instruction and departmental research offered for credit or non-credit through a regular academic department during a regular session. It includes academic department heads, departmental chairmen, all budgeted teaching positions, and support personnel subject to supervision and direction by person filling the aforementioned positions.
- 102 Summer Term Instruction:** This purpose includes instruction and departmental research offered for credit or non-credit through a regular academic department during a summer session, except for Health Affairs budget code 16021 which is included in purpose code 101.
- 110 Organized Research:** This activity includes research efforts of a specified scope which are conducted for the primary purpose of producing research outcomes, whether commissioned by an external agency or separately budgeted within an institution. It includes research project personnel and excludes research administrators and
- 142 Community Services:** This purpose includes those public services, whose primary function is not instruction and departmental research or organized research, directed to members of the community, i.e., persons external to the University, and not classified elsewhere. It includes community counseling and consulting, advisory and reference services, and community projects. It includes organizational divisions which provide varying combinations and types of services, and excludes divisions which are exclusively instructional in their operation. It includes The Institute of Government, continuing education centers, the Community Service and Continuing Education Program (Title I), direct patient care and health care supportive services, and other organized institutes, centers, and services. (It includes public service agreements which cannot more specifically be classified as research agreements or educational services
- 151 Libraries:** This purpose includes the collection, cataloging, classification, displaying, maintenance, restoration, and distribution of published, recorded, duplicated, discovered, and created materials and objects. It also includes the various forms of aid and assistance provided to facility users.
- 152 General Academic Support:** This purpose includes the non-library services which provide support to, and are an internal part of, one or more of the three primary activities, i.e., instruction, research, and public service, of an institution. It includes academic administration (e.g., college deans), academic computing services (e.g., instructional computing and research computing), ancillary support (e.g., demonstration schools, glass blowing shops, laboratory schools, nuclear reactors, and planetariums), audio-visual services (e.g., closed circuit television, learning resources center, and record, film and video center), and museums and galleries (e.g., arboretums, botanical and zoological gardens and traveling displays).
- 160 Student Services:** This activity includes the actions which contribute to the students' emotional and physical well-being and to their intellectual, cultural, and social development. It includes student services administration (e.g., Dean of Students), student admissions and records (e.g., recruitment, evaluation, registration, catalogs, and identification of students), student counseling and career guidance (e.g., placement and testing), student financial aid administration (e.g., administration of student loans, grants, and work-study programs, and financial counseling), minority affairs, and student religious and political organizations, aural broadcasting services, and symphony orchestras.
- 170 Institutional Support:** This activity includes the actions which provide daily operational support, excluding maintenance and operation of the physical plant, to an institution. It includes all central, executive-level management of and long-range planning for an entire institution, all areas of executive direction, (e.g., the governing board, the chief executive office, and the senior executive officers), fiscal operations (e.g., accounting, payroll, contracts and grants), facility management, employee personnel and records, central purchasing, central transportation, (e.g., campus traffic, campus buses, receiving and shipping) central mail service, central telephone service, campus safety and security (e.g., environmental health and safety, campus security and watchmen), alumni and community relations (e.g., alumni records and publications, public information, news service, and commencement), and fund raising and development

- 180 Physical Plant Operations:** This activity includes the services of repairing and maintaining existing grounds and facilities and providing utility services. It includes custodial services, property insurance and controls, fire protection, and campus architectural services related to such projects, which are to be classified in activity number 300.architects. Such costs associated with auxiliary enterprises should be allocated thereto.
- 207 Recreational Services:** This purpose includes the management and operations of recreational, cultural, and social programs for students. It includes student organizations, art exhibitions, dances, festivals, receptions, banquets, intramural and intercollegiate athletics, concerts, guest lectures, and visiting artist/concert series.
- 219 Other Auxiliary Operations:** This purpose includes the management and operation of any institutional auxiliary services not otherwise more specifically identified.
- 230 Student Financial Aid:** This activity includes the monies presented as scholarships, fellowships, traineeships, grant-in-aid, prizes and awards to individuals enrolled in formal institutional coursework. The individuals are not required to render services as consideration for the monies thus presented and are not required to repay the amount received. Also, this activity includes the state's contribution or matchings for work-study, in auxiliary enterprises or elsewhere in an institution, and student loan programs. It does not include the ultimate disbursements of work-study and student loan monies to student-beneficiaries. This disbursement of work-study monies to student-employees is classified according to the activity or purpose in which the service is being rendered. The disbursement of student loan monies is classified within the loan fund group as a creation of a loan receivable. The mandatory transfer of state matchings for student loan programs from the current fund group to the loan fund group is an element of this activity. It includes the awards to students from the supplemental educational opportunity grants program, but excludes the awards from the basic educational opportunity grants program. The receipts and disbursements of basic educational opportunity grants program monies are classified with the

Type	Old Dept Number	New Dept Number	Department Name
Dean's Office 3000-00 to 3019-00			
A&S	3201	300100	Dean's Office - Arts & Sciences
A&S	3201	300101	<i>Arts & Sciences Foundation</i>
A&S	3201	300102	<i>Natural Sciences Business Cluster</i>
A&S	3231	301000	OASIS - (Info Systems)
Undergraduate Education 3020-00 to 3039-00			
UE	3120	302100	Academic Advising
UE	3203	302200	Honors
UE	3203	302201	<i>Distinguished Scholarships</i>
UE	3203	302202	<i>Winston House</i>
UE	3203	302203	<i>Honors Study Abroad Burch Program</i>
UE	3224	302300	Robertson Scholars
UE	3214	302400	Student Success & Academic Counseling, Center for
UE	3235	302401	<i>Learning Center</i>
UE	3234	302402	<i>Writing Center</i>
UE	3234	302403	<i>Academic Support Program for Student Athletes</i>
UE	3234	302404	<i>Summer Bridge</i>
UE	3219	302500	Undergraduate Education
UE	3219	302501	<i>Undergraduate Curricula</i>
UE	3219	302502	<i>First Year Seminars</i>
UE	3219	302503	<i>Student Retention</i>
UE	3236	302600	Undergraduate Research, Office for
Fine Arts 3100-00 to 3109-00			
Dept	3204	310100	Art
Dept	3207	310200	Dramatic Art
Prog	8915	310201	<i>Playmakers</i>
Dept	3212	310300	Music
Humanities 3110-00 to 3129-00			
Dept	3226	311100	American Studies
Prog	3211	311200	Arts & Humanities, Institute of
Dept	3220	311300	Classics
Dept	3215	311400	Communication Studies
Dept	3215	311401	<i>Writing for the Screen and Stage</i>
Dept	3225	311500	English & Comparative Literature
Dept	3229	311600	Germanic & Slavic Languages & Literatures
Prog	3229	311601	<i>Jewish Studies</i>
Prog	3221	311700	Humanities & Human Values
Dept	3228	311800	Linguistics
Dept	3238	311900	Philosophy
Dept	3241	312000	Religious Studies
Dept	3244	312100	Romance Languages
Prog	3145	312200	Study of the American South, Center for the
Dept	3283	312300	Women's Studies

Type	Old Dept Number	New Dept Number	Department Name
Global Programs 3130-00 to 3149-00			
Prog	3239	313100	African Studies Center
Prog	3237	313200	Carolina Asia Center
Crlm	3216	313300	European Studies Center
A&S	3261	313400	Global Education
Crlm	3135	313500	Global Studies
Prog	3240	313600	Middle East & Muslim Civilizations Center
Prog	3249	313700	Slavic, Eurasian & East European Studies Center
Prog	3266	313800	Study Abroad
Crlm	3251	313900	Study of the Americas, Institute for the
Social Sciences 3150-00 to 3179-00			
Dept	3297	315100	Aerospace Studies
Dept	3287	315200	African & Afro-American Studies
Dept	3284	315300	Anthropology
Crlm	3286	315400	Archaeology, Curriculum and Research Labs of
Dept	3252	315500	Asian Studies
Dept	3288	315600	City & Regional Planning
Dept	3289	315700	Economics
Dept	3289	315701	<i>Minor in Entrepreneurship</i>
Dept	3290	315800	Geography
Dept	3291	315900	History
Dept	3291	315901	<i>Sexuality Studies</i>
Dept	3291	315902	<i>Medieval & Early Modern Studies</i>
Dept	3256	316000	Military Science
Dept	3298	316100	Naval Science
Crlm	3206	316200	Peace, War & Defense
Dept	3294	316300	Political Science
Dept	3279	316400	Public Policy
Dept	3296	316500	Sociology
Prog	5215	316600	Urban & Regional Studies
Prog	5215	316601	<i>Community Capital, Center for</i>
Natural Sciences 3180-00 to 3199-00			
Crlm	3232	318100	Applied Sciences & Engineering, Curriculum of *
Dept	3267	318200	Biology
Dept	3265	318300	Chemistry
Dept	3276	318400	Computer Science
Crlm	3264	318500	Environment & Ecology *
Dept	3292	318600	Exercise & Sport Sciences
Dept	3268	318700	Geological Sciences *
Dept	3262	318800	Marine Sciences *
Dept	3282	318900	Mathematics
Dept	3270	319000	Physics & Astronomy
Dept	3258	319100	Psychology
Dept	5235	319101	<i>Psychometric Lab</i>
Dept	3278	319200	Statistics & Operations Research

CAS Program Code List

UNC Wide Program Codes

10000 Operating & Administrative

MOU - CAS Specific Program Codes

13102 Instructional Budget
 13103 Instructional Budget - No Carryover
 13104 Admin Stipends
 13105 DO Salary Allocation
 13106 DO Allocation
 13108 Travel - DO Allocation Only
 13111 Honors Allocation
 13112 IAH Allocation
 13113 Professorship Salary
 13114 Leave Salary

Summer School

1000x Summer School Operating

Regular - CAS Allocation Specific Codes

R0001 Faculty Names -- from time of hire to retirement
 R0001 Special Program Allocations

Pairing Fund Codes with Program Codes

Fund Type - New PS Code	Program		Current SL
State Allocation - 12001	10000	Operating & Administrative	2-32xx1
	13102	Instructional Budget	2-32xx9
	13103	Instructional Budget - No Faculty	2-32xx8
	13104	Admin Stipends	2-32xx1
	13105	DO Salary Allocations	2-32xx1
	1000x	Summer School Operating	2-32xx2
	13106	DO Allocation	2-32xx(y)
	tbd	Allocation Specific Codes	2-32xx(y)
E&T Fees - 12004	10000	Operating & Administrative	2-32xx3
F&A - 12501	10000	Operating & Administrative	3-32xx1
	13106	DO Allocation	3-xxxx(y) not 3-1 or 3-8
	tbd	Allocation Specific Codes	3-xxxx(y) not 3-1 or 3-8
Aux Fd	10000	Operating & Administrative	3-1xxxx
(xxxxx)			
State Receipts - 12003	10000	Operating & Administrative	1-xxxx with 2-xxxxx
	tbd	Allocation Specific Codes	3-8xxxx
Trust	10000	Operating & Administrative	6-xxxxx
(xxxxx)	13106	DO Allocation	6-xxxxx
	tbd	Allocation Specific Codes	6-xxxxx

One or other depending on department/unit type

Many different numbers