Financial Affairs Collaboration Team (FACT)
February 7, 2018
UEC Board Room
Minutes

Regular Attendees: Aguirre, Badulis, Becerra, Beechko, Contreras, De León, Fuller, Galvin, Guzman, Iannolo, Jensen, Kelley, Lopez, Saucedo, Sinha, Vahovick, Valencia, Menchaca, Watkins

Members not in Attendance: Alejandre, Calderon, Chester, Farre, Gee, Levin, Lindsey, Prado, Smith

Guests in Attendance: Ahmed, Maculsay, Strahan, Salazar, Shanks

<u>General Information</u>

1. **CSUSB Business Conference- (Budget Office)**

Maculsay announced that Friday February 9th is the last day to register for the CSUSB Business Conference, which will take place on February 28th. As it is late in the registration timeline, some of the breakout sessions may be filled and closed. More details regarding the conference will be emailed out as the date approaches.

2. **Property Management Improvement Plan (Ahmed/Shanks)**

Jeff shanks, the new director of Support Services, presented an initiative to improve the University property management process. Some of the challenges with inventories is that there is no single point of contact, which often makes traceability and communication very difficult. Support Services is proposing that all departments identify an individual to be assigned as custodian. The custodian would maintain and facilitate inventory for the assigned department.

Some additional improvement initiatives are the development of a roster for custodians, create and provide custodian training. The goal is to open the lines of communication between the Property office and individual departments. The next step is to discuss the initiative with all team members to reach a consensus if the proposed service is feasible within the University.

Support Services will be present at the March 2018 FACT Meeting to discuss any feedback as a close partnership with the FACT team is necessary to make the proposal successful.

3. **Fund Simplification (Badulis)**

The Fund Simplification team has met with 9 colleges and divisions, they will wrap up in the next couple of weeks. The proposed updates have received positive feedback. All members of the Fund Simplification team are available for questions and or feedback. Currently, the team has been implementing a testing phase, with student fees to verify the process. Matias and Dena will be presenting the Fund Simplification Initiative to the Vice President council next week.

4. **Staff/ MPP Clearance Form (Guzman)**

Guzman wanted to update FACT with the status of the Staff/MPP clearance automated form. CSUSB employees no longer have to fill out the paper form version. The automated form will make the separation process more efficient by reducing the number of physical locations an employee has to visit for sign-off. The automated form is located under 'Separation Process' on the Human Resources website. Guzman has requested that this information be communicated through all departments.

Accounting

1. **DACS Update (Becerra)**

Becerra announced that the DACS team will begin auditing all transactions to ensure accuracy of records according to approvals. Additionally, emails will be going out to all administrators for Signature uploads. Both processes will begin within the next week.

Accounts Payable

Auxiliary Financial Services

Budget

1. **Summer 2017 Cost Recovery/ Incentives & PY Balances (Budget Office)**

Maculsay announced that the Budget office will be moving balances before January closes. The Budget office will be contacting Department Analysts regarding where to move the budgets. Any questions, contact Davina Lindsey.

Procurement

Travel

1. **Business mileage rate for 2018 (Kelley)**

Kelley announced that mileage rates increased, effective January 1st, 2018. The update has already occurred in Concur. Further information is on the Account Payable website.

2. **Moving reimbursement tax law change for 2018 (Kelley)**

Kelley shared that all moving expenses are now taxable to employee. Previously only certain items were taxable, now the entire process will be taxable to the employee. This change took effect 2018, the Accounts Payable office is still waiting for further direction on how this change will be handled. Updates are on website.

3. **Concur name change (Kelley)**

SAP and Concur have merged, which has brought about a change in logo and branding. No updates have been done to the system, as of now, it is only a name change.

4. **Zoom option added to Concur Demo Training (Kelley)**

Kelley announced that Mona Sinha has added a zoom option to concur training, which is available through the Human Resources website.

<u>Announcements</u>

FACT members inquired about FOA/CSU business conference registration. No registration link emails have been received this year. Mimi Badulis will look into whether any information has been received and share with all members.