

BUSINESS BRIEFS

April 2024

Important Dates

- 4/5** Deadline for [PTEAP](#) agreements for tenured faculty. This deadline has been extended (originally 4/7) due to the late opening of the 2023-24 PTEAP system. Please access via Self Service – Human Resources Systems – Faculty Admin Center – Post-tenure Effort Allocation (PTEAP). Workflow form will route to your DEO for signature. Any corrections should be sent to ui-frap@uiowa.edu.
- 4/24** Monthly payroll cutoff
- 4/30** All funds budget spreadsheets due back to Jeff Donoghue
- 5/11** End date of the 2023-2024 Work-Study appointments
- 5/14** End date of the 2023-2024 graduate appointments, if not continuing employment into Fall 2024
- 8/26** Start of 2024-2025 Work-Study appointments
- 9/6** End of 2023 Biweekly Student Summer Appointment

AY 2024-25 TA/RA Budget Process

In the annual budget planning application for FY25, we will be allocating your TA budget at the rate of \$22,008 multiplied by the approved number of HTEs for your department. The 2024-25 TA and RA templates should be used when preparing offer letters to graduate assistants for appointments in AY 2024-2025. The templates are available here: [Graduate Assistant Appointments, Reappointments, and Termination Page](#).

Any appointments that, alone or combined with an appointment in another department, causes an employee to have a standard percent appointment greater than 50% requires prior approval from both Dean Getz and Dean Campo in the Graduate College.

The graduating TA/RA appointments should be terminated as soon as you know they will be graduating. Be sure to select “graduating” for the reason and not “end of employment.” This selection impacts their benefits and summer coverage, so it is very important to select appropriately.

PROCESSING FORMS

PAYROLL FORMS FOR FY24 BUDGET

Please process any P&S termination forms for anyone who is terminating before **June 30, 2024**, by the HR Form blackout cutoff date of **April 24, 2024**. This will assure that the FY2025 budget file is accurate.

Faculty who are retiring or leaving at the end of the year should have a termination form processed ASAP. Even if they are to become Emeritus faculty, a termination form **MUST** be done first, then a complimentary 0% Emeritus appointment form effective the day after the termination date can be completed. Please request a NEW position number for the emeritus position. (All employees should have a unique position number.) Forms should be initiated HR form blackout date to coincide with the FY25 budgeting process, if at all possible.

Please check the Faculty Status End Date report for all non-tenure track positions and initiate forms (either termination or reappointment) for anyone with an end date of 6/30/2024 or sooner: Self Service → Human Resources Systems → Data & Reports → HR Reports → Faculty Status Reports → Faculty Status End Date Report.

Please process New Appointment forms, if possible, for faculty who have accepted new positions for next year. All appointments should be made on new positions numbers.

Any faculty whose % times were changed through the year, please submit forms to return them to their original appointment percentage before the HR form blackout date of **April 24, 2024**.

FY24 Carryover Information

Carryover will not be approved for the following:

- [First-Year Seminar](#), carryover is not allowed.
- [Old Gold Fellowships](#), carryover is not allowed.
- General Expense
- Non-DEO Administrative Supplements
- TA Budget
- Faculty Recruitment/Search
- ICR (F&A Return)
- Unspent Visitor/Adjunct Funds
- Book/Music/Performance Subvention
 - The end date to spend these funds is specified in the award letter sent to faculty.
- Research Release – Funds released in FY24 will not be allowed carryover except for a limited number of uses. (Summer Support, Grad Student/Post Doc Fellow stipend/fringe, existing service contracts)
- Unused Arts Advancement Funding

Requests must be made through the Allocation System for the following:

- Startup: Please see the [Startup Policy](#). You must also have a spending plan in place and available upon request.
- Current DEO (Unspent Discretionary Funds)
- Former DEO (Unspent Discretionary Funds)
 - If an expiration date has already been provided to the DEO, no additional carryover will be allowed.
- Associate Dean Research Funds
- Faculty Research Funds (including Research Funds that are part of a faculty retention offer)

- Will adhere to the end date stated in the appointment or retention letter unless the faculty member has previously been granted an extension
- If prior extension granted, will follow revised date, no further extension will be granted
- Research Release
- Extension Soft Landing
- Research Release – Existing research release funds prior to FY24. This will be the final year of approval and will need to be spent by 6/1/25 as no further carryover will be allowed.
- Extension Soft Landing – This will be the final year of approval and will need to be spent by 6/1/25 as no further carryover will be allowed.
- Cost Share
- Provost Funds

TA/RA CHANGE OF STATUS FORMS

TA/RA COS forms for the Spring 2024 semester need to be completed and through the workflow system by Tuesday, **May 7, 2024**, for the tuition to automatically update to follow the appointment MFK. After that date, override requests to gradcogsscholarships@uiowa.edu will no longer be an option to move tuition. A MAUI form will need to be processed and notification sent to ubill-3rdparty@uiowa.edu, grad-cogsscholarships@uiowa.edu, and Jennifer Crawford noting the amount of tuition that is being covered and what funding source is being used.

eCOI Reminder

Faculty and staff who are required to complete the eCOI Annual Disclosure must do so by **April 30, 2024**. Faculty and staff will use this same eCOI reporting system to keep their disclosures updated throughout the year if their situation changes. To complete your Annual Disclosure, log in to the online eCOI disclosure system at <https://ecoi.uiowa.edu/researcher/earoverview> using your HawkID.

Employees may go to the Compliance and Qualifications (CQ) system to view requirements that have been completed, are due now, due soon, or unfulfilled. Please refer any questions to UHR-eCOI@uiowa.edu.

Federal I-9 Employment Eligibility Verification

A reminder that all newly hired employees must complete (in-person) the Federal I-9 employment eligibility verification form within the first three days of employment. Please reach out to your HR representative or the CLAS Transaction Hub at CLAS-HR@uiowa.edu PRIOR to employing anyone to ensure the proper paperwork is completed.

Preparing for FY24 Closing

The First Close will be Friday, **June 30, 2024**. Similar to last year, we expect a short turnaround time for departments to make entries. Please review all encumbrances and if you need to close old encumbrances, email purch-pos@uiowa.edu, including the following text – “Please close PO #xxxxxxx written to Vendor xxxxxxxx.”

We have started following up with departments who have a large number of unreconciled accounts (TDRs). Please review your Dashboard within the EFR to determine if your department has unreconciled accounts.

Please review any food purchases that have been charged to Fund 050. Generally, food expenses should be charged to Foundation accounts or other funding sources.

We realize a lot can happen between now and June 30th, but we need to start reporting early projections for fiscal year end. If you are aware of any carryover requests, please let your accountant know so they may communicate with the CLAS budget officer for approval. Please provide these estimates to your accountant by **May 15, 2024**.

Summer Session

Appointment information, including instructions have been sent out. Summer session appointments should be made to 050-11-xxxx-xxxx-54170000-xxxx-000-00000-10-0000. The following schedule represents the standard appointment periods for Summer 2024:

- 4 Week session: 5/13/24 - 6/07/24: pay prorated by calendar days and issued on 6/1/24 and 7/1/24.
- 6 Week I session: 5/13/24 - 6/21/24: pay prorated by calendar days and issued on 6/1/24 and 7/1/24.
- 8 Week session: 6/10/24 - 8/02/24: pay prorated by calendar days and issued on 7/1/24, 8/1/24 and 9/1/24.
- 6 Week II session: 6/24/24 - 8/02/24: pay prorated by calendar days and issued on 7/1/24, 8/1/24 and 9/1/24.
- 12 Week session: 5/13/24 - 8/02/24: pay prorated by calendar days and issued on 6/1/23, 7/1/23, 8/1/23 and 9/1/24.

The system should automatically calculate the amounts.

TA payment calculations should be handled as stated below.

- 4 Week and 12 Week session: Do not click the exception button. Let the form calculate based on the number of days in the appointment.
- 6 Week I session: Click on the exception button and pay in 2 equal installments on 6/1/24 and 7/1/24.
- 6 Week II and 8 Week session: First, let the form do the standard calculation. Then, take the sum of the amounts for the 7/1/24 and 8/1/24 payments and divide by 2. Click the exception button and then distribute that amount equally on 7/1/24 and 8/1/24. The 9/1/24 payment will remain the same as what the system calculated.

Please contact Jeff Donoghue with any questions.

Student Employment

[Biweekly Payroll Calendar](#) - scheduled dates by which work hours need to be approved for payment

Student Employment's web page for University employers provide valuable information as you prepare for the upcoming hiring period. In addition to the links below, the website provides information that should be given to newly hired students. This information is found in the Quick Links section of the employers' page under the heading "For Newly Hired Students".

- Updated website link: [University of Iowa Employers](#)
- University of Iowa Biweekly Payroll Schedule located at [Payroll Calendars](#)
- Quick Reference Guide of Student Employment Dates located at [Employment Dates](#)

What to Do at the End of the 2023-2024 Academic Year

Students Currently Employed Under a Biweekly Work-Study Appointment:

If the student is currently employed under a Biweekly Work-Study Appointment, the appointment ends 5/11/2024. Employers should NOT file a Termination Form since the appointment ends automatically on 5/11/2024, UNLESS the student leaves the position at least two weeks prior to the end of the appointment.

Employers can run the Biweekly End Date Listing query available on [Self Service](#) under Administration/HR Reports/Biweekly Reports using the 5/11/2024 end date and their org-dept to obtain a list of their departmental student appointments with the end date of 5/11/2024. For students who will be employed beyond 5/11/2024, a new appointment must be created.

Students Currently Employed Under a Biweekly Continuous Appointment:

If the student is currently employed under a Biweekly Continuous Appointment, there is no end date. Students can continue to be employed under this appointment, even if they graduate in May, until 9/06/2024. After that time, the student must be registered for fall classes to continue employment. Employers should file a Termination Form when employment is terminated. If the student is leaving for the summer but will be employed by the same department in the fall, the department does NOT need to file a termination form. The Biweekly Continuous Appointment would carry through to the next academic year.

Uncertain Which Appointment the Student is Currently Employed Under?

If employers are not certain which appointment a student is being paid under, they can check on the student's appointment. The appointment is available on [Self Service](#) under Administration/HR Transaction Reports. The top of the appointment will either say "Biweekly Student Work-Study Appointment" or "Biweekly Student Continuous Appointment".

Summer Hour Limitations for University of Iowa Students

Students can work 40 hours per week 5/12/2024 – 8/24/2024 regardless of summer class enrollment. Information regarding FICA withholding for the summer can be found on the Payroll Services website at [Payroll Services FICA](#). You may also contact Payroll Services with any additional FICA withholding questions at (319) 335-2381. If the employee works over 40 hours per week, the employer is responsible for paying overtime.

Summer Biweekly Student Appointment Options for University of Iowa Students

Employers should choose one of the options and go to the HR Transaction System available on [Self Service](#) to create the appointment. For additional information on the other forms needed to hire a student, go to the [Hiring Student Employees](#) section of the website.

1. Biweekly Student Summer – for use in the following circumstances:
 - Students enrolled at the University of Iowa in the spring semester that will not register for summer classes and were awarded Work-Study for the upcoming year. Employers should modify the default end date on the summer appointment option to 8/24/2024 in order to start the upcoming year Work-Study appointment on 8/25/2024.
 - Students enrolled at the University of Iowa in the spring semester that will not register for classes for the upcoming fall but want to work through 9/07/2024.
 - Students currently under a Work-Study appointment that will graduate May 2024. Start date would be 5/12/2024 and end date would be 09/06/2024.
2. Biweekly Student Continuous – for use when students are currently registered and will continue employment and registration for the future.
 - Registered for Spring - can appoint prior to 5/12/2024 (end of spring semester)
 - Registered for Summer – can appoint as of 5/12/2024
 - Registered for Fall – can appoint as of 8/26/2024

Summer Biweekly Student Appointment Options for NON-University of Iowa Students

High school students or students attending other universities/colleges during the spring semester or summer session can be employed by the University of Iowa from 04/14/2024-09/07/2024 using a Professional & Scientific (P & S) Temporary Appointment with a Job Code of PZ07 Temp Employee Non-UI Student.

In order to hire a non-UI student, you must advertise the job through the Temporary/Other Jobs system on the Jobs @UIOWA website for a minimum of 3 days. The P & S Short Term Appointment Form requires you to select “Temp Posting ID” under Jobs@UIOWA Ad/Posting Info section and list the number in the Temp Posting ID field.

This appointment option is approved by University Compensation and Classification. If you have questions regarding the rules for this appointment you should review the PZ07 section of the [website](#) or call 319-335-5298.

Upcoming 2024-2025 Academic Year Work-Study

To continue on Work-Study for 2024-2025, the student must be awarded Work-Study. The appointment start date can be no earlier than 8/26/2024 and the end date is 5/16/2025. Work-Study awards are approved on an academic year basis. More information will be sent in July regarding the 2024-2025 year.

For students awarded 2024-2025 Work-Study, you are encouraged to create the academic year Work-Study appointment as soon as possible after the student is registered for fall classes. Early registration for 2024 Fall begins in early April.

There is always a large influx of appointments at the start of the academic year. The more appointments that are approved before the academic year begins, the likelier it is that the student will be paid on time. Once the

appointment is approved by Student Employment, it still needs to be downloaded into the payroll system before online time records are available for the student to complete.

If you have any questions or concerns related to student employment, please contact Student Employment at either email student-employment@uiowa.edu or call us at 335 2381.

If you have any questions related to Work-Study, please contact Student Financial Aid at either finaid-workstudy@uiowa.edu or call at 335-2764.

CLAS Policies and Procedures Updates

Please use this link to see the CLAS policies that have been updated recently: <https://policy.clas.uiowa.edu/whats-new>.

Contacts

Tom Koepfel – 335-0134 (Financial oversight & budgeting, Purchases over \$50K, DSP Workflow, Workflow & Security System)

Jeff Donoghue – 335-2605 (Staff & Visitor Budget, Chart Field Requests, Summer & Winter Session, Service Centers, Named Chairs)

Kristina Swanson – 335-0459 (TA/RA Budget, Renovation, Instructional Equipment, Book of Music/Subventions, Creative Writing)

Beth Mellinger – 353-2190 (General Expense Budget & Computer Replacement)

Sandy Mast – 335-9304 (Student Technology Fees, Research & Start Up)

Ryan Kirkey – 384-3489 (Faculty Budget, Old Gold Budget, First Year Seminar, Retention, Faculty Cost Sharing, Research Release)