

# Business Administrators Meeting (BAM)

Tuesday, November 7, 2023

**9:45am**

Welcome

**9:50am**

Financial Services Updates

- OCGA: Sponsored Award Roles and Responsibilities & Staff Introductions
- Travel System – New Reporting and Tips
- Working Fund updates
- PAW Tips
- Rex 2.0
- Budget Update

**10:30am**

Procurement and Strategic Sourcing

- Introduction, Lori Lynch, Director

**10:35am**

Human Resources Updates

- Open Enrollment
- New HRSTM Team members
- Payroll Unit Updates
- Upcoming Training/Change Recap
- PMP Reminders

**11:05am**

Questions

Welcome

Kathy Dettloff,  
Vice President Administration and Finance

# Office of Contract & Grant Accounting

## Sponsored Award Team

- Sponsored awards administration is accomplished by dedicated teams typically composed of:
  - Principal Investigator (PI)
  - Department Administration (DA)
  - Central Administration (CA)

## Central Administration

- Office of Sponsored Programs (OSP)
  - Institutional authority for UMBC

Proposal submission	Negotiate & accept awards
Award modifications	Issue subawards
Non-financial closeout of the award	

- Office of Contract & Grant Accounting (OCGA)
  - Handles the accounting of sponsored awards

Financial Reporting	Invoicing
Cash Receipt	Monitoring of Expenditures
Financial closeout of the award	

## Other Central Offices

- Office of Research Protections & Compliance

- Ensures UMBC conducts its research activities in a manner consistent with regulatory requirements.

Animal Care and Use	Biosafety	Conflicts of Interest/Commitment
Export Control	Human Subjects	Responsible Conduct of Research/Research Integrity

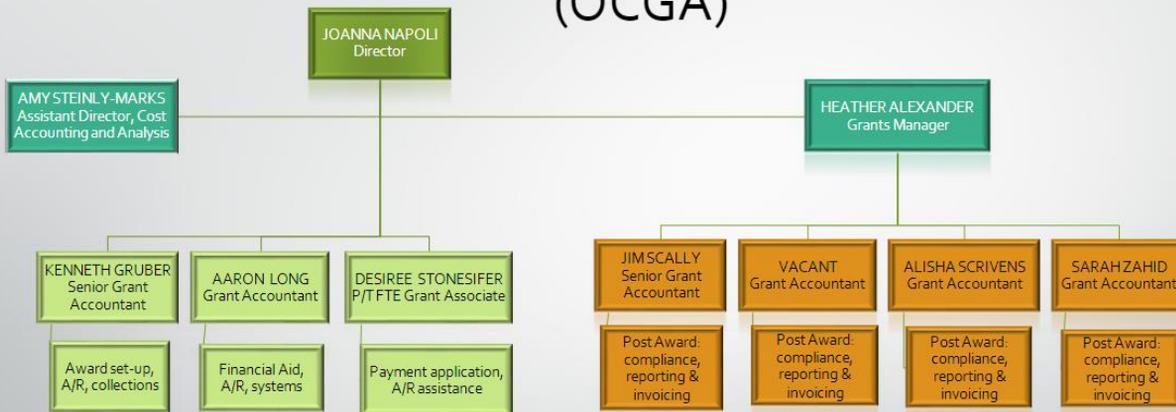
- Office of Technology Development

- |                              |   |
|------------------------------|---|
| Patent/Copyright/Trademarks  | Material Transfer/Non-disclosure agreements |
| Negotiate technology license | Assist with new company formation           |

## OCGA - Responsibilities

- PeopleSoft award setup and review, modifications
- Financial compliance review and analysis
- Sponsor invoicing
- Sponsored financial reporting, analysis
- Revenue collection, receivable management
- Fiscal reporting and reconciliation for Restricted Funds
- Audit responses

## Office of Contract and Grant Accounting (OCGA)



## How to find your Project's Grant Accountant

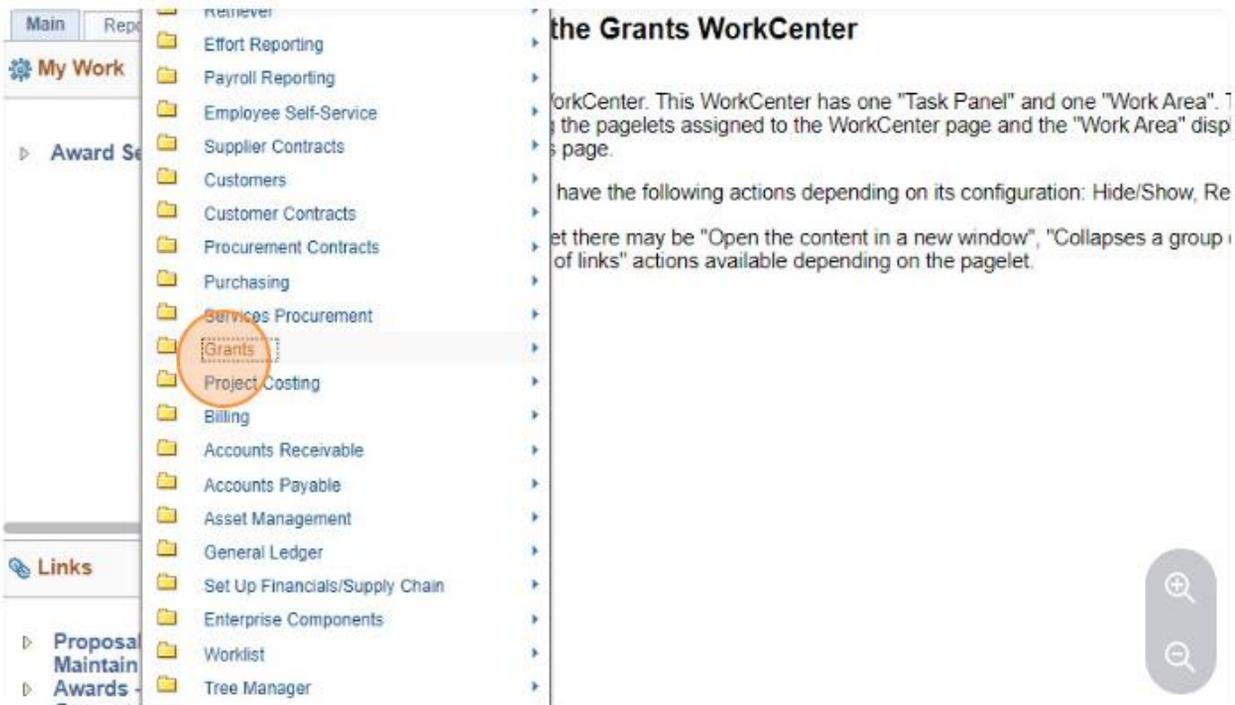
Step 1: Login to PeopleSoft Finance

Step 2: Click "Main Menu"



The screenshot displays the UMBC Finance PeopleSoft Grants WorkCenter interface. At the top, the navigation bar includes 'Favorites', 'Main Menu' (highlighted with a red circle), 'Employee Self Service', and 'Grants WorkCenter'. Below this, the 'mUMBC Finance' logo and a search bar are visible. The left sidebar shows 'Grants WorkCenter' with sub-tabs for 'Main' and 'Reports/Queries'. Under 'My Work', the 'Award Set-up (Contracts)' option is expanded. The main content area features a 'Welcome to the Grants WorkCenter' heading and a paragraph of introductory text: 'Welcome to the WorkCenter. This WorkCenter has one "Task Panel" and one "Work Area". The side displaying the pagelets assigned to the WorkCenter page and the "Work Area" displays pages such as this page. Each pagelet may have the following actions depending on its configuration: Hide/Show, Refresh. Within each pagelet there may be "Open the content in a new window", "Collapses a group of links", and "Expands a group of links" actions available depending on the pagelet.' A search icon is located in the bottom right corner of the interface.

## Step 3: Click “Grants”



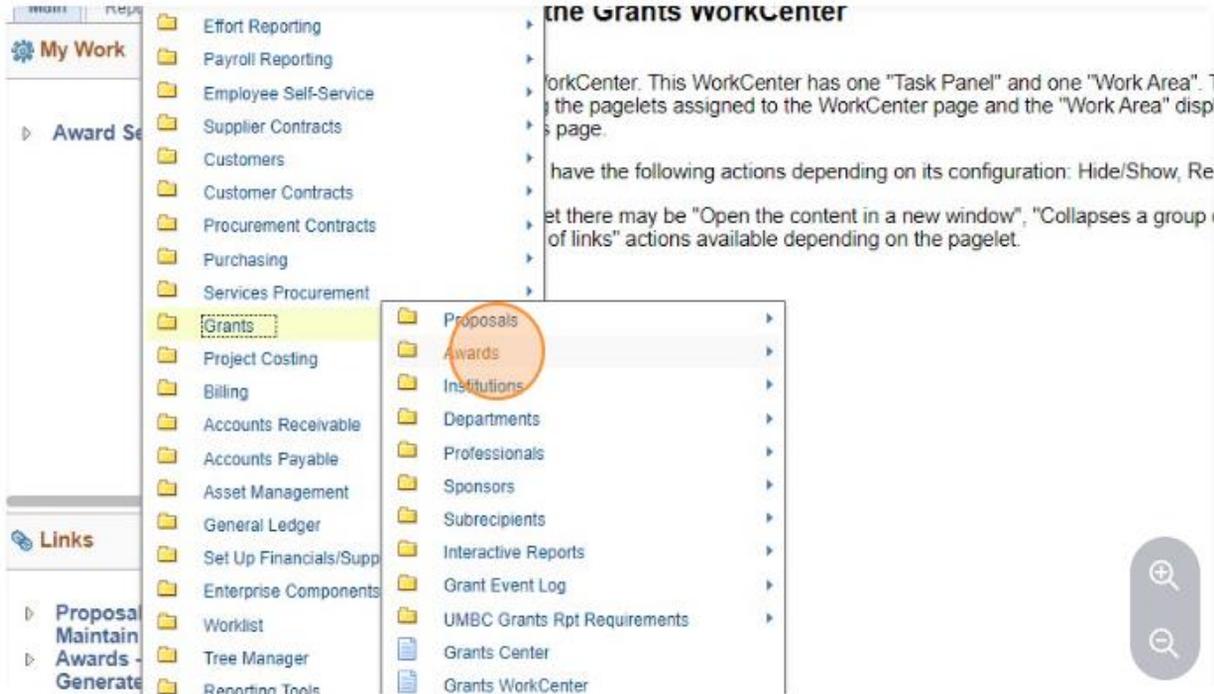
The screenshot displays a software interface with a navigation menu on the left and a main content area on the right. The navigation menu includes sections for "My Work", "Award Se...", "Links", "Proposa...", "Maintain...", and "Awards...". Under "Award Se...", a list of folders is shown, with "Grants" highlighted by a red circle. The main content area is titled "the Grants WorkCenter" and contains text describing the WorkCenter's structure and actions.

**the Grants WorkCenter**

WorkCenter. This WorkCenter has one "Task Panel" and one "Work Area". The pagelets assigned to the WorkCenter page and the "Work Area" display on this page.

The WorkCenter has the following actions depending on its configuration: Hide/Show, Refresh, and Collapse. There may also be "Open the content in a new window", "Collapses a group of links" actions available depending on the pagelet.

## Step 4: Click “Awards”



The screenshot shows a software interface with a navigation menu on the left and a main content area on the right. The navigation menu includes sections for "My Work", "Award Se", and "Links". Under "Award Se", the "Grants" folder is selected and highlighted in yellow. A sub-menu is displayed, listing various folders: "Proposals", "Awards", "Institutions", "Departments", "Professionals", "Sponsors", "Subrecipients", "Interactive Reports", "Grant Event Log", "UMBC Grants Rpt Requirements", "Grants Center", and "Grants WorkCenter". The "Awards" folder is circled in orange. The main content area is titled "the Grants workCenter" and contains text explaining the workCenter structure and actions available.

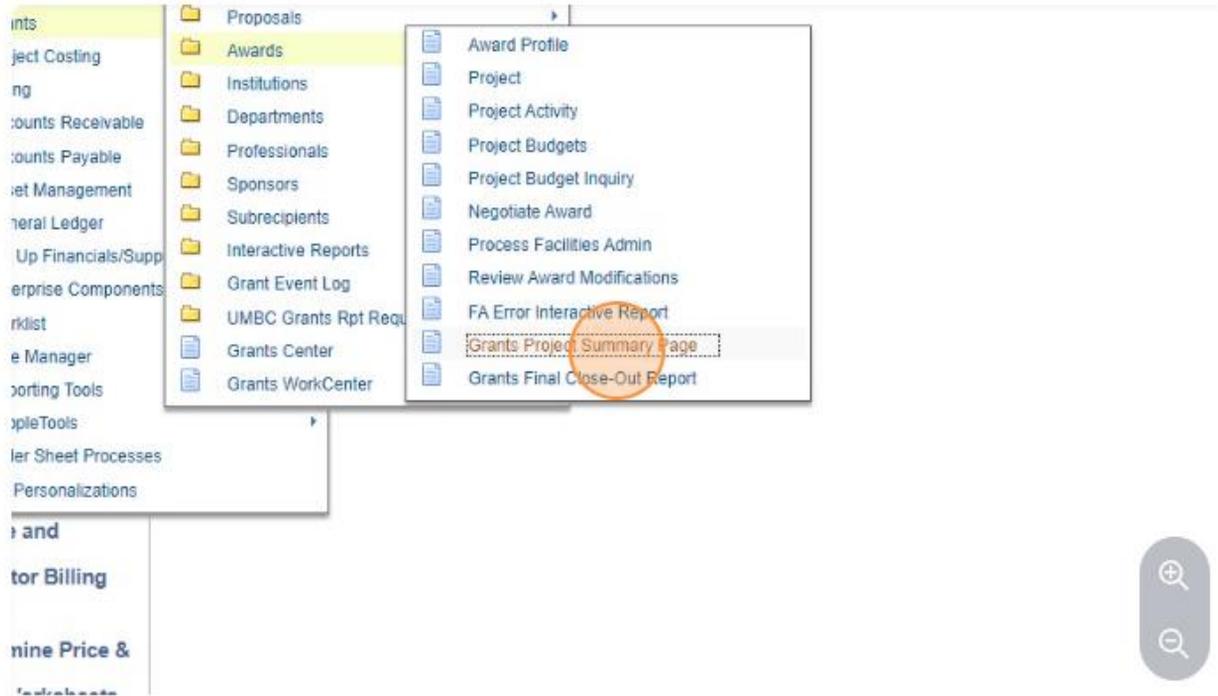
**the Grants workCenter**

workCenter. This WorkCenter has one "Task Panel" and one "Work Area". The pagelets assigned to the WorkCenter page and the "Work Area" display page.

have the following actions depending on its configuration: Hide/Show, Re

et there may be "Open the content in a new window", "Collapses a group of links" actions available depending on the pagelet.

## Step 5: Click “Grants Project Summary Page”



The screenshot shows a web application interface with a navigation menu on the left and a dropdown menu open. The 'Awards' folder is selected, and the 'Grants Project Summary Page' option is highlighted with a dashed border and a red circle. The 'Grants Project Summary Page' option is also circled in red.

- Proposals
- Awards**
  - Award Profile
  - Project
  - Project Activity
  - Project Budgets
  - Project Budget Inquiry
  - Negotiate Award
  - Process Facilities Admin
  - Review Award Modifications
  - FA Error Interactive Report
  - Grants Project Summary Page**
  - Grants Final Close-Out Report
- Institutions
- Departments
- Professionals
- Sponsors
- Subrecipients
- Interactive Reports
- Grant Event Log
- UMBC Grants Rpt Requ
- Grants Center
- Grants WorkCenter

## Step 6: Search by Project ID or other options using the dropdown

▼ **Search Criteria**

Search by:  begins with

[Advanced Search](#)



## Step 7: Find Grant Accountant in the bottom part of the Project Information section

Business Unit: UMBC1    Select Report:     [Go to Process Monitor](#)

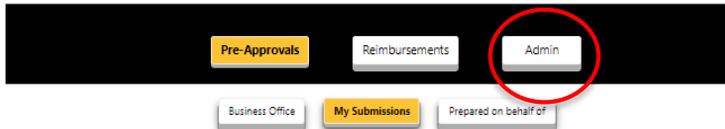
### PROJECT INFORMATION

Project:	NSF00042	Doctoral Dissertation Research	Primary?	Y
Project Status:	Active		Eff. Status:	
Start Date:	03/15/2019	End Date: 02/28/2021	<a href="#">Invoices by Project</a>	
Funded Amount:	\$16,271.00		<a href="#">FAActivity by Project</a>	
Project Manager:	3000174906	Lansing, David		
Dept:	10337	Ctr UrbanEnviron/ Res & Educ		
Location:	856 211C	Sondheim 211C	HERD Type:	Basic
Grant Accountant:	Alexander, Heather		Science Code:	H.02.2016 (Economics - Soc...)

# Travel System Reporting and Tips

# Reports from the Travel System

- Two Travel System reports are now available to every user of the travel system
- “Travel Search” and “Travel Reconciliation”
- In Admin section of the travel system



## REPORTS - Navigation

Pre-Approvals

Reimbursements

Catherine Fu (OR98136) EMail: cfu2@umbc.edu

Help with Travel Request

Directory

Profile

Role Names

Status Codes

Reporting

### VPN Verification

Check here to verify that you are in the UMBC VPN

GlobalProtect VPN

[Go to Reporting](#)

In the admin section:

1. Click on Reporting
2. Verify that you are in GlobalProtect VPN
3. Click on Go to Reporting
4. Choose the report you would like

Explore / Travel / Travel Search



### Travel Search

Owner **Jenniter Moser** Modified Oct 2, 2023, 1:35 PM

☆ 🔍 ⋮

Views **2** Data Sources **1** Connected Metrics **0** Custom Views **1** Subscriptions **0** Usage

Select All

Travel Search		Travel Reconciliation	
Station	Primary Dest Code	Agency	Station
Name	Alt	Station ID	Station C.
Employer	Assigned To	Status	Status Name
Alt	Alt	Search	Travel ID
Fund	Search Created Date	Request	Request Date
Alt	Search Status	Multiple values	
Department	End Created Date		
Alt	Search ID		
Approval	Search Request Date		
Alt	Search Status		
Alt	End Request Date		
Alt	Search ID		
Alt	Search Status		
Project	Search Request Date		

Travel Search

☆ ...

Travel Reconciliation

☆ ...

## The Travel Search Report

Choose the Status



ore / Travel / Travel Search / Travel Search ☆

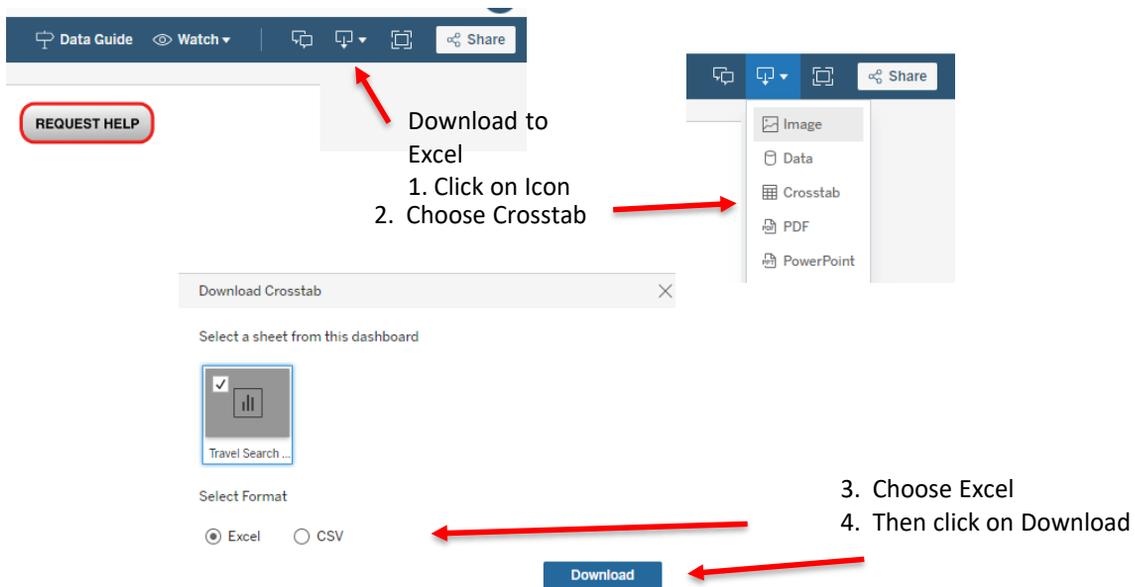
View: all

Travel Search | Travel Reconciliation

Status (None)	Primary Dept Code (All)	<b>Travel Search</b>
Traveler (All)	Assigned To (All)	
Fund (All)	Start Created Date 8/24/2021	
Department (All)	End Created Date 10/25/2023	
Account (All)	Start Depart Date 2/1/2020	
Pfin (All)	End Depart Date 8/2/2024	
Project (All)	Start Return Date 3/23/2021	
Submittal Type (All)	End Return Date 10/14/2024	
Approver (All)	Start Travel Approved 8/24/2021 12:00:00 AM	
Approver 2 (All)	End Travel Approved 10/25/2023 7:04:56 PM	
	Potential Duplicate Rb (All)	

Then choose any filters. The start and end dates will default to your last use.

## The Travel Search Report - Download



**REQUEST HELP**

**Download to Excel**

1. Click on Icon
2. Choose Crosstab

Download Crosstab

Select a sheet from this dashboard

Travel Search ...

Select Format

Excel  CSV

**Download**

3. Choose Excel
4. Then click on Download

## Travel Search Report

The numerous fields include:

- Traveler name
- Travel ID
- Type of request: pre-approval, reimbursement
- Status of request
- Dates of travel
- Travel title
- Preparer name
- Approver(s) name
- Agency ticket prices
- Chartstrings

The report is helpful if you want:

- To find the travel ID for a particular traveler
- To see the status of a request
- To see how many pre-approvals or reimbursements have been completed in your department

B	C	D	E	F	G	H	I	J	K	L	M	N	O
Travel E	Depart	Travel C	Status N	Travel I	Request	Travel E	Travel F	Travel L	Primary	Title	Preparer Name	Return	Create
dave.abate	7/20/2023	ZZ99999	Travel Appr	2776754	preapproval	999999999	David	Abate	10556	CCEMTP travel 2023	Dewar,William A	7/21/2023	6/5/2023
iabp@msn	7/14/2022	ZZ99999	Completed	2577397	preapproval	999999999	David	Abate	10556	CCEMTP travel	Dewar,William A	7/15/2022	6/8/2022
iabp@msn	7/14/2022	ZZ99999	Completed	2577397	reimburse	999999999	David	Abate	10556	CCEMTP travel	Dewar,William A	7/15/2022	8/16/2022
iabp@msn	7/14/2022	ZZ99999	Expired	2576355	preapproval	999999999	David	Abate	10556	CCEMTP travel	Dewar,William A	7/15/2022	6/7/2022

## Travel Search – possible duplicate reimbursements

Potential Duplicate Rb

Y

(All)

N

Y

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Status

Completed

(All)

Canceled

Completed

Completed\*

Entry

Expired

Review

Submitted to DocuSign

Travel Approved

(All)

The Report has a feature to allow for research into potential duplicate reimbursements for the same travel – not found to be a big problem over the life of the travel system

Travel Email	Depart Date	Travel Campus ID	Status Name	Travel ID	Request Type	Travel Empl ID	Travel First Name
acasas@umbc.edu	10/6/2021	AQ53253	Completed	2408604	reimbursement	4000529345	Cesar
acasas@umbc.edu	10/6/2021	AQ53253	Completed	2420541	reimbursement	4000529345	Cesar
adeleka1@umbc.edu	12/11/2022	KB22938	Completed	2654987	reimbursement	4000402422	Adeleke Se
adeleka1@umbc.edu	12/11/2022	KB22938	Completed	2666872	reimbursement	4000402422	Adeleke Se
asplain1@umbc.edu	3/8/2023	LK24372	Completed	2699774	reimbursement	3000211273	Ashley
asplain1@umbc.edu	3/8/2023	LK24372	Completed	2740726	reimbursement	3000211273	Ashley
bdycus1@umbc.edu	4/17/2023	DF91058	Completed	2762181	reimbursement	4000618146	Brooke
bdycus1@umbc.edu	4/17/2023	DF91058	Completed	2762667	reimbursement	4000618146	Brooke
berkes.8@osu.edu	2/20/2023	Z299999	Completed	2713720	reimbursement	9999999999	Enrico
berkes.8@osu.edu	2/20/2023	Z299999	Completed	2729284	reimbursement	9999999999	Enrico
bhp1@umbc.edu	11/29/2022	HL45415	Completed	2657365	reimbursement	3000399153	Bharat
bhp1@umbc.edu	11/29/2022	HL45415	Completed	2696941	reimbursement	3000399153	Bharat
bjeh11@umbc.edu	3/29/2023	AR42173	Completed	2714871	reimbursement	3000320778	Brianna

## Travel Reconciliation Report

For use in distributing monthly travel agency ticket expenses to departments  
Can be filtered by travel agency or status

Includes:

- Chartstring(s)
- Dates of travel
- Traveler
- Travel ID
- Status Codes and names
- Travel Agency
- Charges and Ticket invoice numbers

Useful for researching charges journaled to your chartstring for travel agency charges.

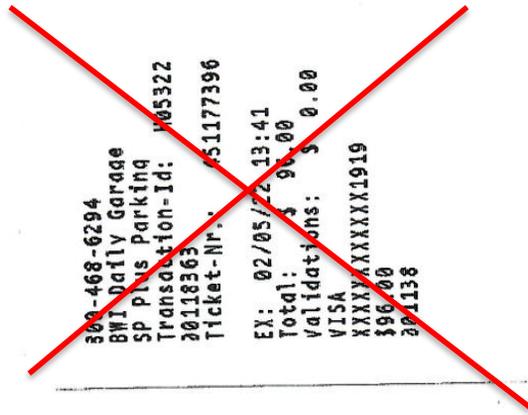
Does not include agency transaction fees.

## Travel Tips

New State of Maryland Requirement: All supporting documentation must be oriented correctly!

300-468-6294  
BWI Daily Garage  
SP Plus Parking  
Transaction-Id: H05322  
30118363  
Ticket-Nr.: 451177396

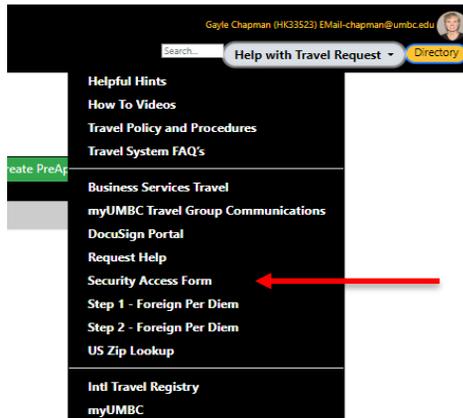
EX: 02/05/22 13:41  
Total: \$ 96.00  
Validations: \$ 0.00  
VISA  
XXXXXXXXXXXX1919  
\$96.00  
301138



300-468-6294  
BWI Daily Garage  
SP Plus Parking  
Transaction-Id: H05322  
30118363  
Ticket-Nr.: 451177396  
EX: 02/05/22 13:41  
Total: \$ 96.00  
Validations: \$ 0.00  
VISA  
XXXXXXXXXXXX1919  
\$96.00  
301138

## TRAVEL TIPS – cont.

To change approvers and next higher approvers in the travel system:  
 You must use the PeopleSoft Security Access Form.



[https://docusign.umbc.edu/secure/prd/FormToDocuSign/Form2DS.php?cfg=FS\\_PAWandPSFinanceDeptApprovalSecurityAccess](https://docusign.umbc.edu/secure/prd/FormToDocuSign/Form2DS.php?cfg=FS_PAWandPSFinanceDeptApprovalSecurityAccess)

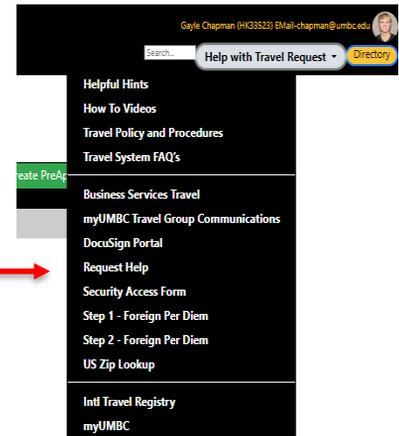
## TRAVEL TIPS – cont.

A Department Admin can set up all other roles in their department:

- PA and RB preparers for employee travelers
- PA and RB reviewers
- Additional approvers
- Preparer admins
- Other department admins

If there is no department admin in your department, request it through RT:

<https://businessservices.umbc.edu/travel/travel-inquiry/>



# Working Fund

## Working Fund Topics:

- General Information
- Types of Requests
- State Of Maryland Guidelines
- Important Reminder

## Working Fund General Info:

**Is a campus administered checking account with an advance from the State Treasurer's office.**

- Important things to consider before entering a WORKING FUND request:
- Contact the Working Fund Custodian Marsha Johnson [marshaj@umbc.edu](mailto:marshaj@umbc.edu) to make sure there are working funds available. These funds are used for nominal purchases ONLY in cases when P-Card usage is not feasible.
  - These are not EMERGENCY FUNDS.
  - These funds are NOT an alternative of paying invoices through AP.
  - These funds are NOT a replacement for POs and or Contracts.

*For Business Services Working Fund Page: <https://businessservices.umbc.edu/working-fund-travel-advance-policy/>*

## Types of Requests

- Employee Payroll Advances
- Travel Advances
- Research subject incentive payments
- Down Payments in relation to purchase orders, where the deposit cannot be made through the regular Accounts Payable.
- Homeland Security Fees
- Athletic Event Fees
- Athletic Team Travel Per Diems

# State of Maryland GUIDELINES:

## “BEWARE”

THE WORKING FUND WILL DENY any Vendor with a Liability Offset.

- You will need to submit a W-9 form along with the Working Fund Check Request Form for the supplier, so that we can verify that there is not a Liability Offset pending. We will be unable to issue a check if they do.
- For Travel Advances, reimbursements should be completed within 10 days from date of return.

- ***\*All CHECKS NOT CASHED IN 30 days...Will BE VOIDED***

## Important Reminder:

**\*\* MOST IMPORTANT FACT TO REMEMBER ABOUT WORKING FUND REQUESTS??\*\***

**\*\*To avoid any BUMPS, just make sure we have FUNDS \$\$\*\***

Working Fund Custodian: Marsha Johnson

[marshaj@umbc.edu](mailto:marshaj@umbc.edu)



## Quick PAW Receipt Tips

## QUANTITY vs COST RECEIPTS

If when ordering, you need to choose HOW MANY of an item,  
Use a QUANTITY receipt to show that you received the items.

A COST receipt is only for services or a subscription - something not countable. These things cannot be physically returned.

Simple rule:

If you can count the individual items, use a QUANTITY receipt.

If you cannot count the individual items, use a COST receipt.

## RECEIVED – RETURNED - CANCELED

Rule of thumb – follow “reality”

- If you received the good, even if it is damaged, put in a received receipt.
- If you returned it, put in a returned receipt. **BUT, MAKE SURE YOU PUT IN A RECEIVED RECEIPT ALSO!**

Catalog No.	Unit Price	Qty/UOM	Extended Price
B00BU93R28	49.01 USD	1 EA	49.01 USD

Qty / Cost (In)	Qty / Cost (Out)	Status
	1	Returned
2		Open
-1		Net Received

Catalog No.	Unit Price	Qty/UOM	Extended Price
B00BU93R28	49.01 USD	1 EA	49.01 USD

Qty / Cost (In)	Qty / Cost (Out)	Status
1		Received
	1	Returned
1		Open

- You never received it, but then canceled it with the supplier, put in a canceled receipt. Make sure the supplier knows it is canceled.

## Returned? Supplier needs to agree!!

When an item is received, we need to pay the invoice.  
Put in a received receipt ASAP.

When you return an item, make sure the supplier agrees that it is returned, so that they issue a credit memo.

Amazon phone number: (888) 281-3847

# Tableau Reports

## “Rex Finance 2.0”

- Tableau Dashboards have been updated with the following enhancements
  - New Subtotals and formatting in the Summary Reports
  - Additional descriptive fields on the Detail Dashboards
  - New Journal Entry Lookup and General Ledger Dashboards
- Intro and Reconciling Trainings are posted on the **Trainings** my.umbc.edu group
- Drag and Drop capability with limited data fields access rolling out soon

## Budget Update

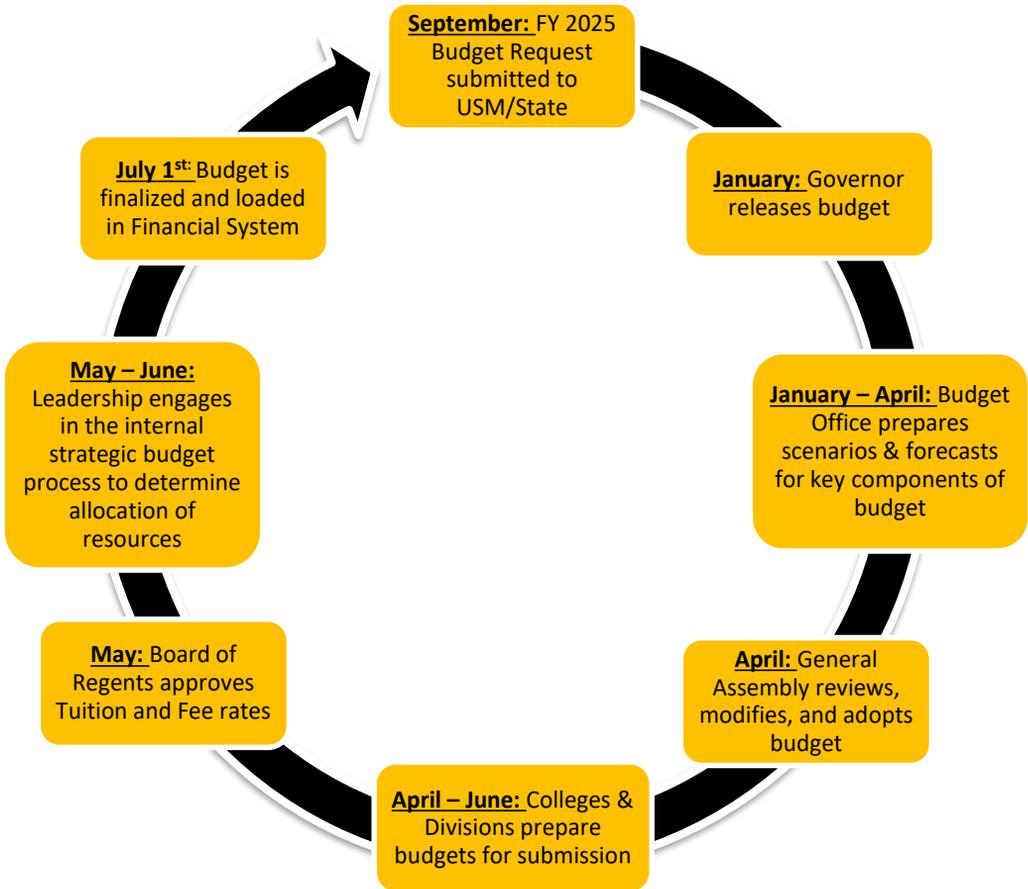
Christopher Correnti  
Deputy Budget Director

UMBC's budget is comprised of two fund groups:

***Unrestricted revenues*** are resources provided to the institution with no restrictions on their use. These resources are separated into three categories:

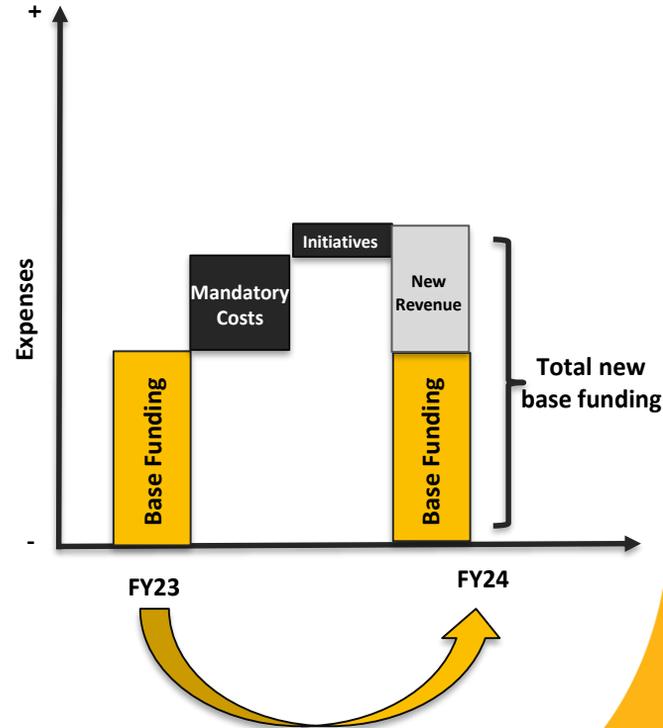
- **State Support** - Comprised primarily of tuition revenue and funding from the State. This makes up the largest share of the budget and is used to support the primary academic and instructional mission of the campus.
- **Auxiliary** - Captures non-academic operations that are self-supporting or self-funded that do not rely on allocations from the State Supported budget to operate. Residential Life, Dining Services, and the Bookstore are all examples of auxiliary units on campus.
- **Self Support** – Includes academic programs that generate their own revenue to support their operation. Examples of programs in the Self Support budget include Summer and Winter programs, professional programs offered through DPS, and Faculty Start-Up costs supported with DRIF.

***Restricted revenues*** are sponsored by outside entities such as the federal government, state, or the private sector that can only be used for very specific purposes. For example, this includes grants we receive for research projects, Pell grants and other designated scholarships.



## Incremental Budgeting Model:

1. Change to revenue is determined for new budget year (*e.g. tuition, appropriations*). This change in revenue is used to pay for changes in expenses.
2. The three colleges get an allocation of funds that is informed by the resource allocation model, which in FY23-24 exceeded their own mandatory costs.
3. The other divisions receive incremental base budget for mandatory costs (*e.g. COLA, Merit, Minimum Wage*).
4. The other divisions are invited to submit for supplemental funding for strategic initiatives.



<i><b>Changes in State Support Revenue</b></i>	<i><b>\$ Change</b></i>
State Appropriation	25,192,568
Undergraduate Tuition	1,387,965
Graduate Tuition	4,453,403
Fees	640,494
Investment Income	1,400,200
Indirect Cost Recovery	1,500,000
Other Revenue	379,864
<b>Total</b>	<b>34,954,494</b>

<i><b>Changes in State Appropriation</b></i>	<i><b>\$ Change</b></i>
COLA and Merit	19,238,552
Fringes	5,769,122
Mpower	400,000
Other Changes	(215,106)
<b>Total</b>	<b>25,192,568</b>

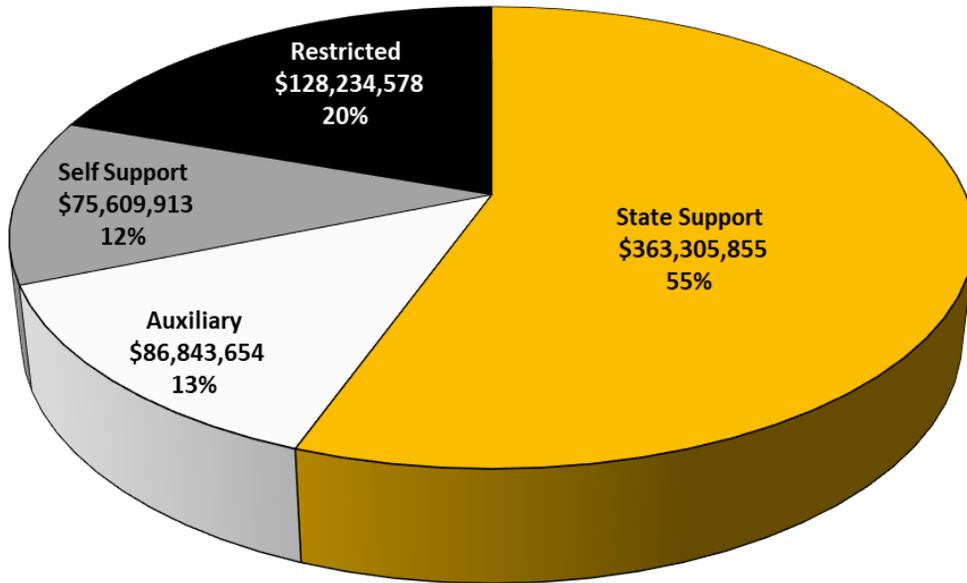


# FY24 State Support Expenses

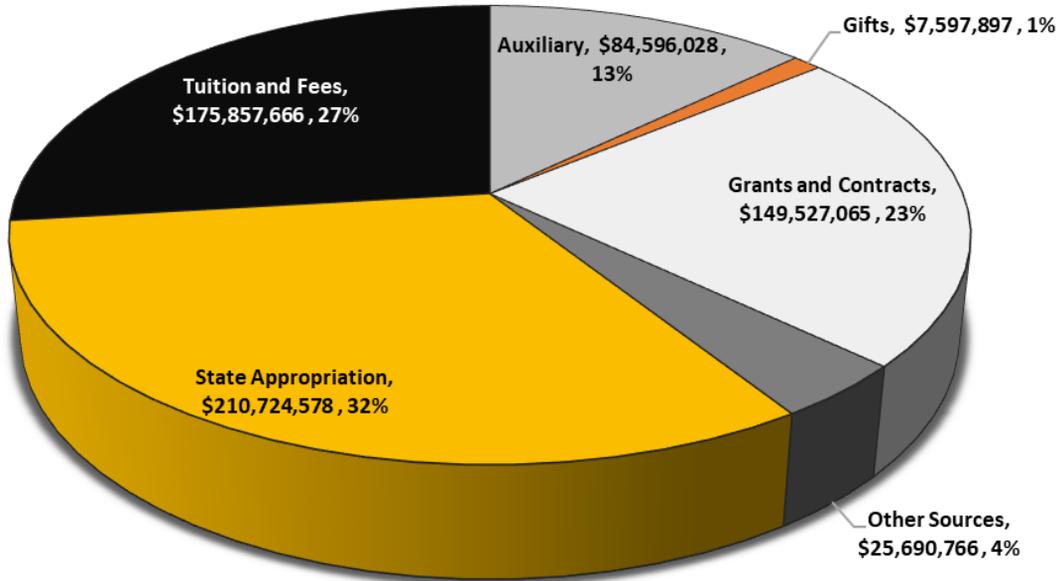
<i><b>Mandatory Costs</b></i>	<i><b>Change \$</b></i>
COLA/Merit/Minimum Wage (Divisions)	9,741,008
Facilities Renewal	3,000,000
Fringes	5,773,581
FM Contractual Services	621,073
IT Contractual Services	663,494
Library Serials	130,000
Utilities	2,018,134
Other	638,661
<b>Total</b>	<b>22,585,951</b>

<i><b>Remaining Allocations</b></i>	<i><b>Change \$</b></i>
Allocation to Colleges	9,807,253
Strategic Initiatives	2,293,400
<b>Total</b>	<b>12,100,653</b>

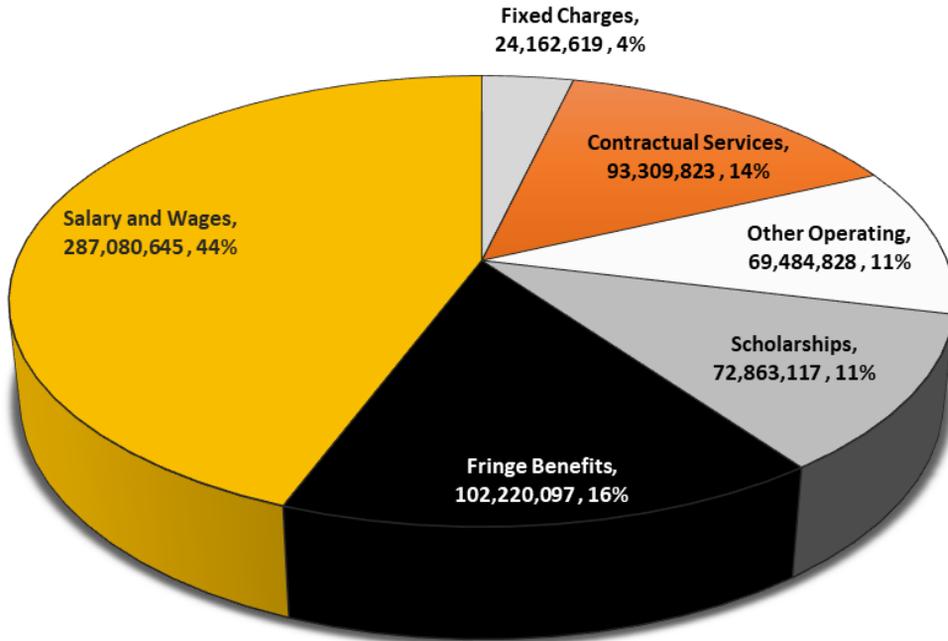
**Budgeted Revenue: \$653,994,000**



## Budgeted Revenue: \$653,994,000



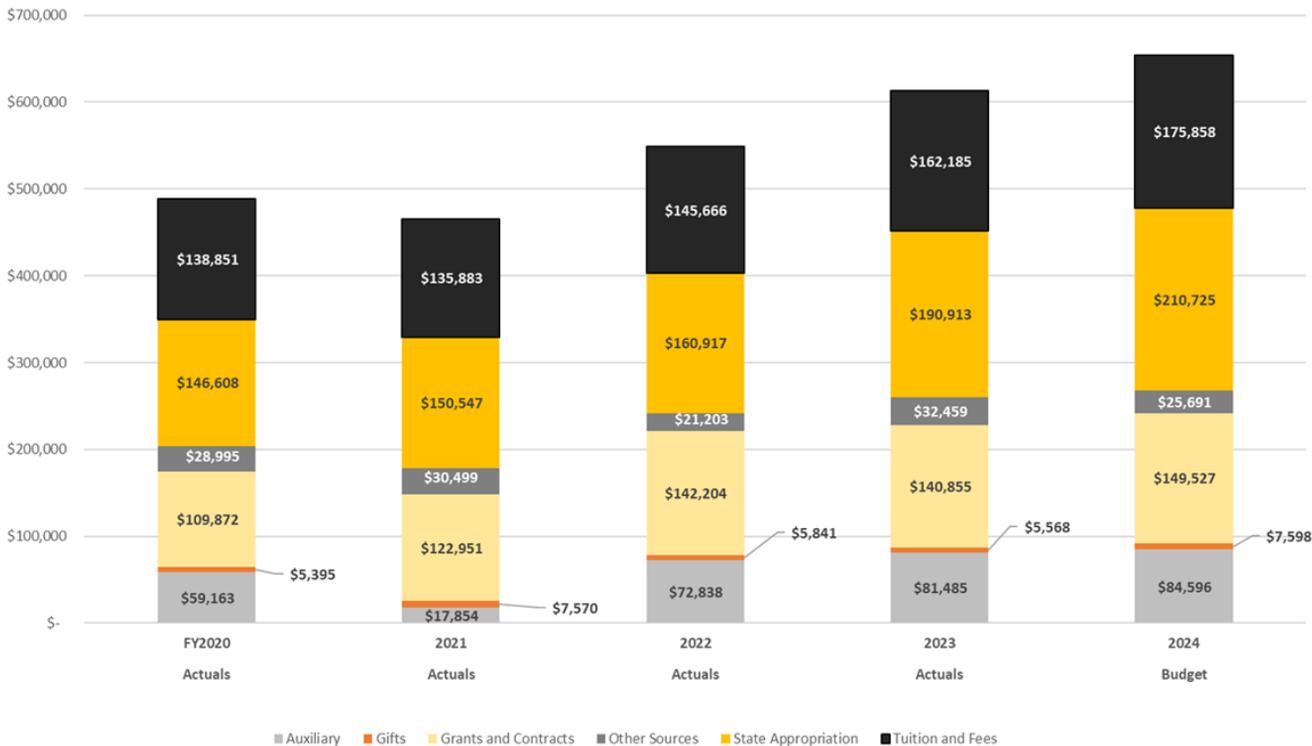
## Budgeted Expenses: \$649,121,129



## Fund Balance Goal: \$4.87M



# What does our growth look like?

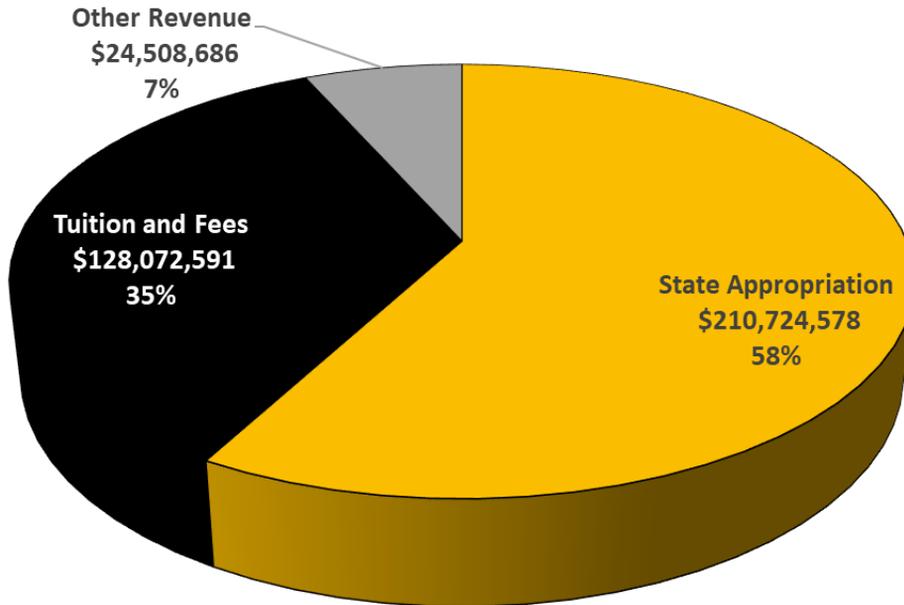




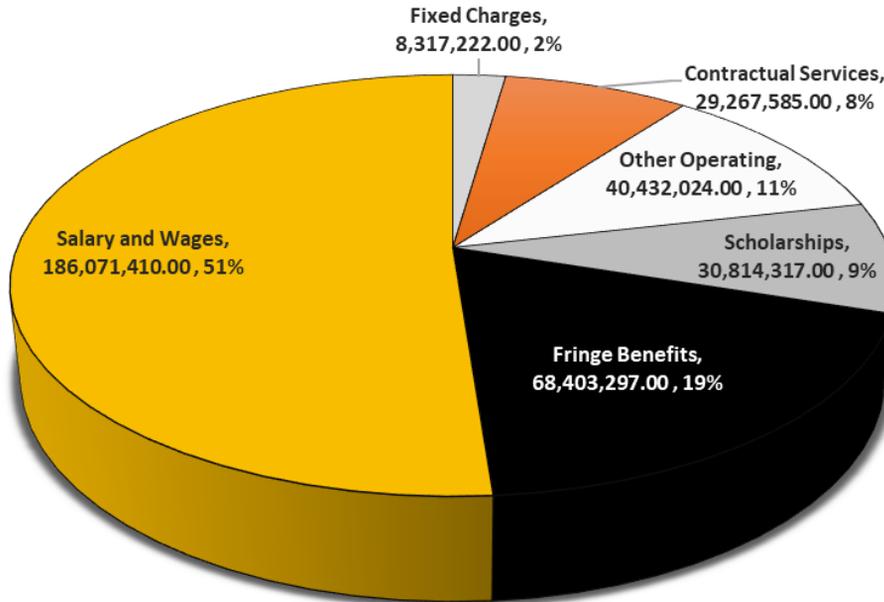
# Budget Summary by Account

	FY 2023 Budget	FY 2024 Budget	\$ Change	% Change
<b>Revenues</b>				
Tuition and Fees	154,531	175,858	21,326	13.8%
State Appropriation	185,815	210,725	24,910	13.4%
Grants and Contracts	119,386	149,527	30,141	25.2%
Gifts	6,901	7,598	697	10.1%
Indirect Cost Recovery	155	155	-	0.0%
Investment Income	600	2,000	1,400	233.4%
Other Sources Revenue	20,101	23,762	3,661	18.2%
Auxiliaries	76,047	84,596	8,549	11.2%
Transfers	(325)	(227)	98	-30.3%
<b>Total Revenue</b>	<b>563,212</b>	<b>653,994</b>	<b>90,782</b>	<b>16.1%</b>
<b>Expenses</b>				
Salary and Wages	247,872	287,081	39,208	15.8%
Fringe Benefits	82,220	102,220	20,000	24.3%
<b>Total Compensation</b>	<b>330,092</b>	<b>389,301</b>	<b>59,208</b>	<b>17.9%</b>
Scholarships and Fellowships	69,348	72,863	3,515	5.1%
Travel	4,902	6,379	1,477	30.1%
Equipment	8,434	9,785	1,351	16.0%
Supplies & Other	21,283	30,298	9,015	42.4%
Utilities	12,762	16,655	3,892	30.5%
Contractual Services	82,463	93,310	10,846	13.2%
Fixed Charges	24,116	24,163	46	0.2%
Infrastructure	5,592	6,368	776	13.9%
<b>Total Expenses</b>	<b>558,993</b>	<b>649,121</b>	<b>90,128</b>	<b>16.1%</b>
<b>Net Surplus / (Deficit)</b>	<b>4,218</b>	<b>4,873</b>		

## Budgeted Revenue: \$363,305,855



## Budgeted Expenses: \$363,305,855



## Introduction

Lori Lynch, Director

## HUMAN RESOURCES



## & STRATEGIC TALENT MANAGEMENT

# **Business Administrators Meeting November 7, 2023**

- Open Enrollment
- New HRSTM Team members
- Payroll Unit Updates
- Employee Relations Updates
- Talent Learning & Organization Development

## Benefits

- Open Enrollment ends on THURSDAY this year, there are 2 days left to make changes for 2024.
- Please make any changes ASAP as the help desk can be on overload the last day.



**Open Enrollment 2024**

October 16th through November 9, 2023 at 5:00 p.m.

## New HRSTM Team members



- Justine Gonzales- Executive Administrative Assistant
- Andrea Guzman- Employee Relations Specialist
- Sophia Pirozzi- HR Associate
- Leah Reppert- Benefits Specialist
- Christopher Schrader- Compensation/ Classification Manager
- Kelsey Wurmer- HRIS Analyst/Specialist

## Payroll Updates

- Payroll Manager-Valentina Bertermin
- Payroll Specialist- Backfilling position
- Payroll Director- Begins December 4, 2023
- New Payroll Associate- Position-November 20, 2023
- Temporary processors (3)- Onboard
- Functional Payroll/Technology consultant
- Discovery stages for HCM system



## Employee Relations Updates

### PMP

Currently in mid-year review cycle (Oct-Nov)

Gather documentation

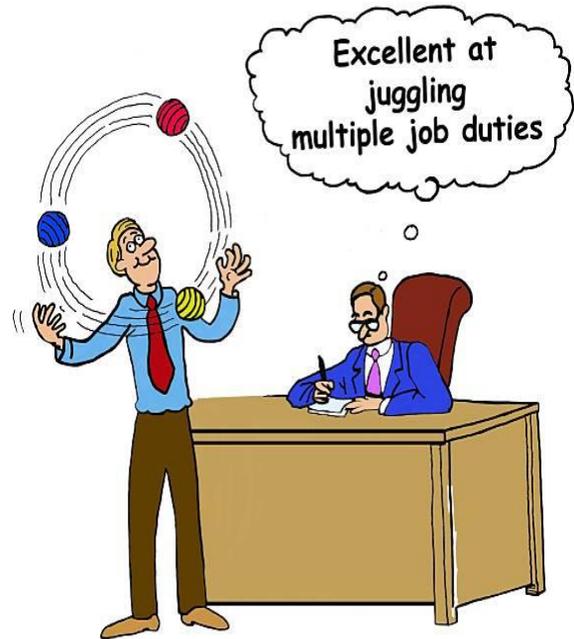
Review the performance expectations that were set at the expectation meeting and the progress made towards goals

Identify areas that need improvement

Examine areas of disagreement

No formal evaluation is made

Sign the Cover Page



## Talent Learning & Organizational Development

- **UMBC Change Initiative**
  - FranklinCovey October Training
  - Divisional Change Champions
  - Spring Campus Training TBD
- **[Professional Development Week Playlist](#)**
  - 13 sessions including a leadership keynote
  - Workshop topics on leadership, DEI, workplace productivity, and wellness



## Talent Learning & Organizational Development

- **Upcoming Training - Register at [umbc.edu/training](https://umbc.edu/training)**
  - 11/7 Time Management
  - 12/4 Imposter Syndrome
- **Spring Initiatives**
  - New Onboarding Initiative January 2023
  - Leadership Academy Program Roll Out
  - 4/22-4/26 HR Week + Admin Professionals Lunch



