

Business Affairs Officer Committee

Meeting Highlights

April 5, 2023

1:30 – 3:00 PM

BAO Co-Chairs: Christine Green and Elizabeth Godwin

Review and Approval of Meeting Highlights of March 1, 2023

BAO group approved March 1, 2023, BAO Committee Meeting Highlights.

The next BAO Committee meeting will be on **Wednesday, May 3, 2023**, 1:30 PM – 3:00 PM.

Announcements & Reminders

- BAO Membership Update – WDET’s former BAO, Jowana Moore, is now working for Physiology Department. WDET is looking for a new BAO. If you know anyone who might be interested in the position, please share the information. Derek Donnellon is helping out until a replacement can be found.
- Evacuation Plans/Contacts update – Please update your Evacuation Plan contacts if you haven’t already done so. The deadline is now pushed out to April 15th.
- Roster Reconciliation – due on April 10th.
- FY2023 permanent budget entries – due by April 17th.
- Please don’t forget to close/liquidate your POs if no more financial activities are anticipated. You don’t have to process a COR for each individual one, you can submit the “batch closure request” form to close them all together.
- Christine has a list of folks who wants to be a part of the team to look into Foundation proposals. Christine will set up a meeting with Sharon Progar and the Foundation team and be in touch with everyone.
- Certain units may have issues with the approval queues for IRB liquidation. Please let Christine or Liz know if you have this type of issue. If it is relevant to everyone, then we will discuss it together in a future meeting.

New Business

New BAO Security Forms - Marlene Johnson, System Security Specialist, C&IT

- Detailed information on how to terminate access, request access, authorize approvers, and generate the security report can be found through the link/page below:
<https://tech.wayne.edu/enterpriseapps/access>
- The latest BAO access request form has been updated on March 31, 2023. **Please be certain to pull the latest updated form** on <https://tech.wayne.edu/enterpriseapps/access>. If you submit an old version form, it will be returned because it is outdated and the rules have been changed.
- If you have any questions regarding STARS access application on the BAO access request form, please contact stars@wayne.edu.
- Procurement is working on the new WayneBuy profile, related information will be added to the BAO access request form once it is ready.
- C&IT security team is working on digitalizing the BAO access request form.
- HRMS org code and many other helpful information can be found in the FGRORGH report. This report can be generated through the Smart Eye finance system. Here is the job aid link for convenience: <https://hr.wayne.edu/srvctr/files/organization-hierarchy-report-fgrorgh.pdf>
- Annual BAO attestation form is forthcoming. Required annual review of employee access permission. Will likely be Issued in May 22, return by July 10th.

Comments/reminder: Since May 2022, employees can manage access to departmental data without administrator support through [Departmental Shared Drive Access Portal](#). This change gives the **data owners** full control over who accesses their data on the W drive. If you own a folder or role, you will no longer need to submit a ticket to grant or remove access. You can also easily see who has permission to read or modify folders you own. In addition, you can go to go.wayne.edu/DeptData to view access reports, grant access to new users and modify existing access. Note: all BAOs are not data owners.

SPA Refresher

Timothy Foley, Training Specialist, SPA

Marlene Erno, Senior Director, Research Support Services

- LevelUp program
 - The LevelUP program offers an exciting, unique training experience, through unparalleled access, engaging courses, and cutting-edge educational design.
 - The program consists of training modules that are 2 to 5 hours in duration on topics most relevant to the modern research administration professional, including pre-award administration, post-award finance, and regulatory and financial compliance. Each module includes a randomized, comprehensive 50-question exam that challenges you and your team to demonstrate their aptitude while reinforcing the lessons and insights contained in the course. The modules can be completed at any time, from any location, and you are awarded micro-credentials and digital badges for successfully passing the module exam.
 - There is no cost associated with participation for employees. Participants may take as many of the available modules as desired, with no cost to the WSU department. For each module completed, participants will earn a micro-credential and a digital badge. These digital badges can be publicly displayed on signature lines, LinkedIn

profiles, and other social media outlets for easy viewing by the professional community and organizations.

- Individuals must fill out and submit WSU LevelUP Registration form to gain access. <https://forms.wayne.edu/620d0625e37c4/>
- Cayuse Research Suite
 - SPA utilizes the Cayuse research suite to streamline proposal development and award processes. All proposals for extramural funding begin with a record in Cayuse SP. Faculty and administrators access Cayuse using their access ID and password.
 - Cayuse SP is the electronic system of record for all sponsored programs proposals. Records are accessible to PIs, Department Administrators, Chairs, Deans, and SPA Administration.
- Researcher's Dashboard
 - The Researcher's Dashboard is an easy-to-use intuitive tool that provides a secure, easily accessible gateway to researchers' proposal, grant, and contract information.
 - Dashboard provides a common front end, a "one-stop shop" to access pre- and post-award grants administration data such as internal approval status, contract status, accounting information, current labor distribution, and imaged documents (award documents, GFAs, etc.).
 - All Wayne State University researchers and administrators have a seamless one-point access to "live" grant and contract information from multiple sources - the Banner Administrative System and Cayuse proposal development, and award management applications.
- Power BI Cayuse Report
 - Power BI Cayuse Reports assists with tracking grant and proposal information within modules that provide a comprehensive and customizable output of vetted data from the Cayuse Research Suite.
 - It is interactive, allowing users to manipulate data by selecting date parameters, specific colleges, departments, and principal investigators. Each component of SPA Power BI Cayuse Reports, when selected, can provide users with more detailed information which, in turn, allows for filterable and customizable reporting.
 - Those interested in utilizing SPA Power BI Cayuse reports must submit a SPA Cayuse Power BI Reports access requestion form. Please log in using your entire access ID email address and password. You must first log in to the WSU VPN if connecting from outside the University. <https://forms.wayne.edu/6230a8997a8f7>
- Financial oversight of the grants.
 - There are different roles in the financial oversight of Grants - the PI, the department administrators, the schools/colleges/divisions, and the central offices.
 - The PI, department administrators, and schools/colleges/divisions have the first-line management of Grants. The expectation is that they're charging their grants timely, they're putting the correct charges on their grants, and the correct payroll on the assignments.
 - The SPA central office doesn't manage grants. They assist in audits on grants.
 - The key thing to managing grants is correctly charging them and charging them timely.
 - If an expense transfer is incorrectly charged to one grant and you need to move it to another one or it's on an ICR or in general fund needs to come to the grant, either

side (debit or credit) goes to SPA office, it does not go fiscal operation. SPA review for compliance issues, process the journal entry, and approve the transfer.

- *Timely* - the federal uses timely as 90 days from the time of the charge. If it's past that, there's justification that's needed. There is a form on SPA website that shows how to do the expense transfer and what needs to be included in that expense transfer.
- Oversight of the effort reports – usually the department Administrators are the pre-reviewers of the report, the expectation of the Business Office is to perform that the oversight processes are being completed.
- Funding sources of cost-sharing – typically the funding of cost-sharing goes through the business office. Please make sure we have a funding source. When the award comes in, we need to know the funding source in order to do the transfer to fund the cost-sharing. (Marlene can talk about the cost-sharing process in a future meeting.)
- Provisional or tentative accounts – when you don't have a formal award yet, but you are confident award documents are forthcoming, you can tentatively establish the grant. You can put your payroll and other expenditures on the tentative index. SPA highly recommends that we set up the tentative accounts if you know the award is coming in. It's a lot easier to have the charges going on versus transferring them at a later date. *There is some risk though - because if the award doesn't come through, then the unit must cover the costs charged to the tentative index.*
- If there is a deficit in the grant, it needs to be cleared.

Human Resources Updates - Bill Ging, Dir, HR Data & Technology

- If you haven't submitted the part-time faculty spreadsheet, please submit as soon as possible.
- HR is replacing the Background check vendor; the new system will be ready in about 4 weeks.
- The applicant tracking system is in phase 2.
- HR just started email notifications to our candidates, hiring managers, and approvers. If the candidate doesn't have the appropriate set of skills, they are going to start getting notifications that other candidates have been selected.
- Requisition request module is being set up.
- Offer letter integration module is being set up too, hopefully, the offer letter can be integrated by the end of June. A background check will also be integrated.
- Talent Management Coordinators are also working on a new talent acquisition model.

Question: Would there be any discussion of staffing for the new EPAF data entry responsibility in departments?

Answer: Bill will ask Carolyn for this.

Question: What's the best way to search for positions in Cornerstone since the department is not listed?

Answer: Including the Department in the title and Search by title is the most efficient way for now.

Inquires related to WayneBuy/Approval Queues/Procurement

Ken Doherty, AVP of Procurement & Strategic Sourcing

Questions: How to track individual unit's routing queues, to see who has access to which index?

Answer: The procurement team will work with C&IT to create a spreadsheet to list each BAO's queues, including the queue names and the people on various levels.

Questions: If a vendor (individual) starts to work before they are added to the WayneBuy system, once they get into the system, they already finished the job. Will we get pushback from Purchasing or Disbursement if we submit a DPR for the project?

Answer: We need to make sure we follow the policy, but the Procurement team will do their best to make it accommodated.

Comments: Procurement is aware that the turnaround time of new vendor requests for individuals is not ideal. The procurement team has been short on staff, but they're in the process of re-hiring and training the new staff. The turnaround time will get better. If you need to process anything urgently, please alert the Procurement team.

Comments: Procurement is working on changing the new vendor request process on WayneBuy self-service portal for individuals and companies. The procurement team will present and announce it to the campus once it's ready.

Comments: Procurement has an opening Travel Specialist position. If you know anyone who might be interested, please share the information.

Discussion and Questions:

Comments: Please turn on your Teams notifications for BAO group if you haven't. We will start sharing more information on our "WSU BAO Group" page in Teams instead of sending emails that get buried under all our day-to-day work. It doesn't automatically turn on. Please follow the instructions in the link below to turn them on so you don't miss any information. <https://support.microsoft.com/en-us/office/customize-channel-notifications-in-teams-c72b8c07-37e1-4a0b-82c9-fdfda04f15b2>

Comments: FBO will send out a survey to collect some topics that you want for training opportunities.

Closing Remarks/Adjournment

We will be on Teams for May 3rd meeting and in person for June 7th meeting.