EXPLORE ARIZONA THROUGH DATA

Fiscal Year-End Data
OVERVIEW

▪ Introduction
▪ Overview of Fiscal Year-End Rollover
▪ Focus on Financial Reporting
▪ Focus on Employee Reporting
▪ Conclusion
Who We Are & What We Do

UAIR is committed to providing data that empowers campus decision makers, informs policy and practice, and tells the Arizona story.
ACKNOWLEDGEMENTS | UAIR Team Members

TODAY’S PRESENTERS

- Christopher Cherry, IT Training & Support Specialist
- Bethany Prim, Assistant Comptroller
- Abraham Silva, Program Manager, Administrative Data
- Mary Baum, Manager, Initiatives & Outreach
- Abbie Montenegro, Director, Workforce Systems

TODAY’S PANELISTS

- Eddie Caratachea, Assistant Director, Administrative Reporting & Analytics
- Elvira Fike, Business Analyst, Senior
- Janet Gurton, Business Analyst, Principal
- Mitch Owen, Senior Business Intelligence Developer
- Jennifer Pfennig, Senior Manager, Accounting
- Angelica Toledo, Business Analyst, Senior
Survey Question: Please rank your level of experience with the following UAccess Analytics products/services.
Relevant question(s) from Sign-up

How to complete the YE financial process

Refresh on year-end information available

What are best practices and must-do tasks for FYE?

Learn about fiscal year process

College level year end process and timeline

Steps to complete at FY end

What Analytics resources are available to help me during year-end?

What happens during year end process?
Fiscal Year-End Background & Important Deadlines
FISCAL YEAR-END BACKGROUND

- The University operates on a July 1 – June 30 fiscal year.
- Financial data is collected, audited, and reported in the University’s Annual Comprehensive Financial Report (ACFR):
  https://www.fso.arizona.edu/financial-management/annual-reports
FISCAL YEAR-END BACKGROUND

- The ACFR provides the institution’s financial position and activities.
- The information it contains is used in various surveys and required reporting.
- Summary information is included in the Interactive Fact Book:
  https://uair.arizona.edu/content/revenue-expenditures
PREPARING FOR YEAR-END

▪ Departments play a critical role in the fiscal year-end process.
▪ Revenues and expenditures must be appropriately classified and recorded in the correct fiscal year.
▪ Goods or services received and/or provided on or before June 30 need to be recorded in FY2022.
▪ Supporting documentation must be attached in UAccess Financials.
YEAR-END INFORMATION

Financial Services provides information and resources related to fiscal year-end:

https://www.fso.arizona.edu/financial-management/year-end

Fiscal Year End 2022

- Year-End Overview
- Important Dates
- Communications
- Year-End Calendar Spreadsheet

Tutorials and Training (coming soon)

- Accounts Payable Year-End 2022
- A/R - Inventory Year-End 2022
- Data Exploration Series: Focus on Fiscal Year-End Data

A/R - Inventory Reporting Resources

- Accounts Receivables Schedules
- Inventory Schedules
- Other Schedules (Used to report Unearned Revenue, Deposits, Prepaid Expenses, and Accrued Expenses)
YEAR-END OVERVIEW

Interim close of FY 2022 is June 30, however corrections can be made through July 15, 2022.

https://www.fso.arizona.edu/financial-management/year-end/overview-fy2022

Important Dates

- May 31, 2022: Moveable equipment inventory deadline is May 31, 2022. For more information on FY 2022 Physical Inventory, please refer to the FNSV Property-Physical Inventory Microsoft Team. To request access to the Team or for inventory related questions, please visit the inventory webpage or contact propertymanagement@fso.arizona.edu.
- June 30, 2022: Interim close of fiscal year 2022 period 12. Interim reports will be available in UAccess Analytics for this period on Friday, July 1.
- July 11, 2022: Line item receiving and PREQ documents will continue to post back to Period 12 through this date.
- July 13, 2022: Administrative Service Charge will post back to Period 12.
- July 14, 2022: PELs will be available after 10 a.m. Salary Expense Transfers related to the split payroll can be processed using the YEST.

Corrections identified during the reconciliation of period 12

These corrections will need to be initiated using the year-end version of the corresponding document. For example, use the Year-End Distribution of Income and Expense (YEDI) instead of the standard Distribution of Income and Expense document (DI). This chart identifies the year-end version of the standard eDocs:

<table>
<thead>
<tr>
<th>STANDARD EDOC</th>
<th>YEAR-END EDOC</th>
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</thead>
<tbody>
<tr>
<td>Distribution of Income &amp; Expense (DI)</td>
<td>Year-End Distribution of Income &amp; Expense (YEDI)</td>
</tr>
<tr>
<td>General Error Correction (GEC)</td>
<td>Year-End General Error Correction (YEGC)</td>
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<td>Transfer of Funds (TF)</td>
<td>Year-End Transfer of Funds (YETF)</td>
</tr>
<tr>
<td>Salary Transfer (ST)</td>
<td>Year-End Salary Transfer (YEST)</td>
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</tbody>
</table>
IMPORTANT DATES

A detailed list of dates can be found here:

https://www.fso.arizona.edu/financial-management/year-end/dates-fy2022
COMMUNICATIONS

Sign up for the University Business Offices email list to receive weekly year-end updates.

https://www.fso.arizona.edu
FUND ACCOUNTANT SERVICES

Financial Services provides accounting advisory services to University departments.

To learn more and look up contact information, go to:

https://www.fso.arizona.edu/financial-management/fund-accountants

References & Guides:

https://www.fso.arizona.edu/financial-management
How can UAccess Analytics tools help?

UAIR has created several reports and tools in UAccess Analytics that are here to assist you in planning for fiscal year-end rollover.
What are some useful tools to help manage my accounts for year-end reporting?

Focus on Financial Reporting
What reports can help me monitor financial accounts?

The **General – Financial Management** dashboard delivers tools to monitor general financial information. It is a practical means for account reconciliation. On this dashboard, you can find reports on transactions, payroll, income, and expenses.

*Path to Reports:*
*UAccess Analytics Dashboards > Financial > General – Financial Management*
Where can I go to find information for account reconciliation?

The **Account Reconciliation** tool provides six different reports on one page for a selected account number. Reports include account balance, income, expenses, transactions, and more.

*Please note: The tool will only work for one account number at a time.*

*Path to Reports:*

UAccess Analytics Dashboards > Financial > General – Financial Management > Account Reconciliation
How does this relate to Fiscal Year End?

The **Account Reconciliation** provides a good overall view of a given account’s current position. The tool lets you know if you have any transactions that have occurred in the current period (period 12 for FYE) that may require adjustment.
ACCOUNT RECONCILIATION REPORTS

- Current Account Balance
- Income / Expense
- Encumbrances and Pre-Encumbrances
- Transactions
- Open Operational Encumbrances
- Payroll Expenditure Listing
- Position Encumbrance Detail
<table>
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<th>Field</th>
<th>Value</th>
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</thead>
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<tr>
<td>Fiscal Year</td>
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<td>Period Number</td>
<td>11</td>
</tr>
<tr>
<td>Account Number</td>
<td>-</td>
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<tr>
<td>Sub Account Number</td>
<td>-</td>
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<tr>
<td>Accounting Category</td>
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<tr>
<td>Cost Share Type</td>
<td>-</td>
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<tr>
<td>Object Code</td>
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</tbody>
</table>

* This symbol identifies a field that is mandatory as a prompt when running reports on that page.

* This symbol identifies fields that have a default value populated when you first open the dashboard; you may change or remove these default values as needed.

NOTES: This dashboard will only work for one account at a time. If you wish to see more than one account, please use the links to individual reports.

The Accounting Category prompt must be un-filtered in order to return correct results on the Current Account Balance report for Cash Style accounts.

* Select the fiscal year, period number, and account number to filter reports.*
This report gives the current information for the account including supervisor and manager names.
This report details information on budget, income, expense, transfers, current balance, etc. for the selected account.

Select a view for the report.
This report gives details on income and expenses for the selected account.
This report details encumbrances and pre-encumbrances for the selected account.
This report details transactions for the selected account.
This report details transactions for the selected account.

Select a view for the report.
This report details payroll expenditures for the selected account.
This report details position encumbrances for the selected account.
Did you know there is a tool to help reconcile your PCard statements?

The **PCard Statement Reconciliation** dashboard contains transaction level detail for transactions occurring during a given period. This tool can be used in lieu of a Purchasing Card Statement.

*Please note: The Post Date range defaults to the dates of the previous billing cycle and should match your most current PCard Statement.*

*Path to Reports:*
UAccess Analytics Dashboards > Financial > General – Purchasing Card > Statement Reconciliation
How does this relate to Fiscal Year End?

Since PCard statements and reconciliation do not align perfectly with the University’s fiscal periods, the PCard Statement Reconciliation dashboard will facilitate the PCard reconciliation process for the statement that crosses the two fiscal years.

https://www.fso.arizona.edu/accounts-payable/pcard
What information and documentation is required for PCard purchases?

All PCard transactions (PCDO) must include:

1. An **original invoice/receipt** attached to the Notes and Attachments tab on the PCDO.

2. A **business purpose** for the expenditure. The business purpose provides justification for why the expenditure was incurred, how it benefited the University of Arizona, and how it complied with all laws and regulations. [https://www.fso.arizona.edu/financial-management/business-purpose](https://www.fso.arizona.edu/financial-management/business-purpose)

3. In addition to the business purpose, some common PCard purchases require additional documentation.

See the PCard Compliance page for details: [https://www.fso.arizona.edu/compliance/pcard](https://www.fso.arizona.edu/compliance/pcard)
Select the filters for the report.
This report details purchasing card transactions for a selected account and time period (Post Date).
What tools will help assist with verifying PCard transactions for my department?

The **General - Purchasing Card - Action Items** dashboard contains several informational tiles to give you a quick overview of important PCard indicators during the *current billing cycle*.

*Path to Reports:*
UAccess Analytics Dashboards > Financial > General – Purchasing Card > Action Items
The report provides a way to stay on top of some of the more critical aspects of managing PCards including transactions auto approving soon, PCards expiring soon, and other PCard related items.

*Note: This only shows the current period until you open it, so even if it says 0, you will still want to open the box.*
Purchasing Card Transactions with No Supporting Documentation

The results on this dashboard are limited to the current PCard billing period, from 3/8/2021 to 4/6/2021.

*Purchasing Card transactions not on this dashboard (Images File Flag or Notes And Attachments File Flag are equal to Y) must be reviewed by the transaction approver to ensure supporting documentation is compliant with University policy. Documentation may be subject to review by Financial Services Financial Compliance.

Click the blue area to look for transactions in other billing periods.

Select a view for the report.

Transactions by Org Code
Transactions by Cardholder

This report shows the details on PCard transactions with no supporting documentation for the current billing period.
### Purchasing Card Transactions with No Supporting Documentation

*Purchasing Card transactions not on this dashboard (Images File Flag or Notes And Attachments File Flag are equal to Y) must be reviewed by the transaction approver to ensure supporting documentation is compliant with University policy. Documentation may be subject to review by Financial Services Financial Compliance.*

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</tbody>
</table>

Select a view for the report.

- Transactions by Org Code
- Transactions by Cardholder

This report shows the details on PCard transactions with no supporting documentation for the selected post dates.
How do I track payroll expenses and salary expense transfers?

The **Payroll Expenditure Listing with SET** dashboard report shows payroll expenditures and salary expense transfers (SET) for a department. There are pivots to show the data in summary and in detail, listed by department, object code, employee, etc.

*Path to Reports:*
*UAccess Analytics Dashboards > Financial > General – Labor Ledger > Payroll Expenditure Listing with SET*
How does this relate to Fiscal Year End?

The **Payroll Expenditure Listing with SETs** allows you to review payroll and make any necessary adjustments prior to the end of the Fiscal Year. There is a specific view titled *Fiscal Year Summary by Employee Name* that provides a good overview of where an employee was paid from throughout the year.
Select the fiscal year, fiscal period, and organization code to filter the report.
This report details Payroll Expenditures and Salary Expense Transfers.
How do I know what fund transfers are allowed between different accounts?

The **Allowable Transfers** dashboard is designed to assist you in learning the rules and appropriate transfer documents to use in processing the movement of funds between different accounts and sub-funds.

Path to Reports:
*UAccess Analytics Dashboards > Financial > General – Financial Management > Overview*

Listed under the **Reconciliation Reports**

*UAccess Analytics Dashboards > Financial > General – System Value Sets > Allowable Transfers*
How does this relate to Fiscal Year End?

Since departments are working on cleaning up accounts at the end of the fiscal year, **Allowable Transfers** is a helpful tool to find the forms and documentation needed to transfer funds. You can filter the report by account number or sub-fund group code.
Select Account Number or Sub-Fund Group Code and set the values you would like to use to filter the data.
This report shows an allowable transfer of funds result. You can pull detailed lists of accounts and sub-fund groups this account can transfer to. Additionally, you can see what transfer options are available to you in the YES outcome.
Here is the detailed report of the Sub-Fund Groups this account can transfer funds to.
Here we see an account where the transfer of funds is not allowed. Even with a negative result, you can still pull the detailed lists of accounts and sub-fund groups this account can transfer to.
How do I discover what transactions are still en route for FY2021?

The **En Route Transaction** dashboard is designed to allow the user to view en route transactions across all UAccess Systems. Transactions can be viewed by:

- **Transactions Pending Approval**
- **Transactions Initiated**

*Path to Reports:*

UAccess Analytics Dashboards > Employee > Business Manager Home Page > UAccess Enroute Transactions
How does this relate to Fiscal Year End?

The **En Route Transactions** lets you know what transactions are still routing and risk being impacted by FYE procedures. Once year end adjustment transactions begin to route, they must be processed in a timely manner.

Please refer to the detailed list of important dates:
https://www.fso.arizona.edu/financial-management/year-end/dates-fy2022
Select the individual, organization, or college. Then select a transaction type you would like to use to filter the data.
### Financials

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<tr>
<th>Transaction Type</th>
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<td>Account</td>
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<tr>
<td>Account Delegate</td>
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<tr>
<td>Budget Adjustment</td>
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<tr>
<td>Cash Receipt</td>
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<td>Disbursement Voucher</td>
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<td>39</td>
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<td>Effort Certification</td>
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<td>244</td>
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<td>General Error Correction</td>
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<td>Internal Billing</td>
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<td>Payment Request</td>
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<td>Procurement Card</td>
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### Employee

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<td>Approval for Supplemental Comp</td>
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<td>Create or Modify Positions</td>
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<td>Job Change Approvals</td>
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<td>MSS Campus Colleague</td>
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<td>MSS Exception</td>
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<td>1</td>
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<td>MSS New Hire</td>
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<td>2</td>
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<tr>
<td>MSS Personal Info Update</td>
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<td>Position Funding Change</td>
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<td>Terminate Employment</td>
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<td>Year End DCC Rollover</td>
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### Research

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### Budget

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<tr>
<td>Budget Transfer</td>
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Click on the number of transactions to bring up a detailed report of items.
## Enroute Transaction Details | Financials (KFS)

Transactions on this report have a pending workflow step.

### Transactions Pending Approval Detail

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<th>Document Number</th>
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</table>
Understanding Important Employee and Designated Campus Colleague (DCC) Information
How do I keep track of my unit's employee information?

The **New Business Officer Central Reports** provides a means of monitoring employee information.

It provides reports on Out-of-State Employees, Service Awards, Student Employees, Benefit Enrollment, Vacant Positions, Payment Request, and much more!

*Path to Reports:*
*UAccess Analytics Dashboards > Employee > Business Officer Central > Overview*
Welcome to the Business Officer Central Dashboard! This dashboard provides a means of monitoring business manager employee information.

Dashboard Page and Sub-Page Descriptions

- Business Officer Central Highlights
- Benefits Enrollment
- Missing Supervisor/Time Approver
- Retirement Eligibility
- Unenrolled Student Employees
- UAccess Ernese Transactions
- Payment Requests
- Pay Check
- Service Awards & Retiree Recognition
- Affordable Care Act (ACA)
- Student Overhead
- Out-of-State Employees

We Want to Hear From You

Welcome to the Employee Dashboards!

These dashboards contain a set of reports related to Employee and HR data. Some modifications and adjustments may be needed, and we certainly welcome your input!

If a report isn't working as expected, you think the data is incorrect or you have suggestions for improvement, please submit Feedback using the link below. Be as specific as possible.

If you need a report similar to one you find on these dashboards but customized to your specific unit needs, consider "stealing" that request and customizing it to make it your own.

Dashboard Feedback

Contact

For additional contact information please go to the Additional Resources page.
How does this relate to Fiscal Year End?

The **Business Officer Central** dashboard provides several reports that will support the management of positions, DCC relationships and funding that may expire with the end of the fiscal year. Using this dashboard, you can take action to ensure your positions, DCCs and funding sources are all updated prior to the start of the new year.
Business Officer Central Highlights

- Positions Ending (30, 60, 90, or 120 days)
- DCC Relationships Ending (one month)
- Employees with Visa Expiring (six months)
- Accounts Expiring (90 days)
- Positions Funded from Expiring Accounts (30 days or Less)
- Employees on LOA/Sabbatical
## Business Officer Central Highlights

### Department Highlights

<table>
<thead>
<tr>
<th>Number of Employees</th>
<th>Positions</th>
<th>Job FTE</th>
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<tbody>
<tr>
<td>93</td>
<td>93</td>
<td>85.6</td>
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</tbody>
</table>

#### Full/Part Time

- **Full-Time**: 74.09%
- **Part-Time**: 25.91%
- **Leaves of Absence**: 0.01%

#### Employee Status

- **Active**: 98.0%
- **On Leave**: 2.0%

### Items for Review

**Workforce**

1. Employees on LOA/Sabbatical
   - Details
2. Employees with Projected Hours Exceeding Allowed Carry Forward
   - Details
3. Employees Pending in New Hire Process
   - Details
4. Employees with Pending Time Approvals
   - Details
5. Employees in Benefit Enrollment Process
   - Details
6. Employees with FLSA Status Change Applied
   - Details
7. Part-Time Employees Eligible for Retirement Benefits
   - Details
8. Employees with Visa Expiring Within 90 Days
   - Details
9. Employee with 401(k) Plan
   - Details

**Financials**

- **PCard Action Items**: 0
- **Accounts Expiring in 90 Days**: 0

**Milestones**

- **Current Month**: [Current Month]
- **Current Fiscal Year**: [Current Fiscal Year]

### Special Dates & Milestones

#### Employee Birthdays

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Person Name</th>
<th>Birthday</th>
</tr>
</thead>
</table>

#### Employee Work Anniversary

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Person Name</th>
<th>Years of Service</th>
</tr>
</thead>
</table>

---

University Analytics & Institutional Research
What are other useful tools to help manage my employees for year-end reporting?
Is there a way I can identify positions or individuals that will be ending?

The **Rollover Home** page has two dashboard tools to retrieve information on individuals and jobs with expected end dates and no expected end dates.

*Path to the Reports:*

UAccess Analytics Dashboards > Employee > Rollover > Home > Individuals/Jobs with Expected End Date

UAccess Analytics Dashboards > Employee > Rollover > Home > Individuals/Jobs with NO Expected End Date
How does this relate to Fiscal Year End?

The **Rollover Home** is a page to support the management of positions and employees. It allows you to review jobs and personnel with and without expected end dates.
### Rollover Reference Report
**Individuals/Jobs with Expected End Date**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>College Id for Job Department</td>
<td>Select Value</td>
</tr>
<tr>
<td>Job Department</td>
<td>Select Value</td>
</tr>
<tr>
<td>Employee ID</td>
<td>Select Value</td>
</tr>
<tr>
<td>Position Number</td>
<td>Select Value</td>
</tr>
<tr>
<td>Class Indicator</td>
<td>Select Value</td>
</tr>
<tr>
<td>ABOR Code Description</td>
<td>Select Value</td>
</tr>
<tr>
<td>Compensation Rate Code</td>
<td>Select Value</td>
</tr>
<tr>
<td>Visa Expiration Date</td>
<td>Between, Select Value</td>
</tr>
<tr>
<td>College Name For Job Department</td>
<td>Select Value</td>
</tr>
<tr>
<td>Job Department Name</td>
<td>Select Value</td>
</tr>
<tr>
<td>Name</td>
<td>Select Value</td>
</tr>
<tr>
<td>Supervisor Name</td>
<td>Select Value</td>
</tr>
<tr>
<td>Paygroup</td>
<td>Select Value</td>
</tr>
<tr>
<td>Contract Length</td>
<td>Select Value</td>
</tr>
<tr>
<td>Jobcode Description</td>
<td>Select Value</td>
</tr>
<tr>
<td>Expected End Date</td>
<td>Between, Select Value</td>
</tr>
</tbody>
</table>

To capture particular employee groupings, complete the prompt as indicated below:

#### 9Pay72 Employees
- Compensation Rate Code = `SAL`
- Contract Length = `A`

#### 9Pay9 Employees
- ABOR Code Description = `Academic Professional, Administrative, Classified Staff, Faculty, Service Professional, Postdoctoral Scholar`
- Compensation Rate Code = `SAL9`

#### Fiscal Employees
- Compensation Rate Code = `SAL`
- Contract Length = `F`

#### Wage Employees
- ABOR Code Description = `Academic Professional, Administrative, Classified Staff, Postdoctoral Scholar, Service Professional`
- Compensation Rate Code = `HRLY`

#### Graduate Academic Employees
- ABOR Code Description = `Graduate Assistant/Associate`
- Compensation Rate Code = `SAL9`

#### Graduate Fiscal Employees
- ABOR Code Description = `Graduate Assistant/Associate`
- Compensation Rate Code = `SAL`

#### Clinical Assistants
- ABOR Code Description = `Clinical Assistant`

**Please note that 9Pay7 employees with an EED action/reasons of RFB, OFF and SBR will continue through the next academic year automatically. MSS job change requests are not required to “return” this population from short work break.**
### Rollover Reference Report

**Individuals/Jobs with NO Expected End Date**

<table>
<thead>
<tr>
<th>College Id for Job Department</th>
<th>Job Department</th>
<th>Employee ID</th>
<th>Position Number</th>
<th>Class Indicator</th>
<th>ABOR Code Description</th>
<th>Compensation Rate Code</th>
<th>Visa Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Value</td>
<td>Select Value</td>
<td>Select Value</td>
<td>Select Value</td>
<td>Select Value</td>
<td>Select Value</td>
<td>Select Value</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>College Name For Job Department</th>
<th>Job Department Name</th>
<th>Name</th>
<th>Supervisor Name</th>
<th>Paygroup</th>
<th>Contact Length</th>
<th>Jobcode Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Value</td>
<td>Select Value</td>
<td></td>
<td>Select Value</td>
<td>Select Value</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### To capture particular employee groupings, complete the prompt as indicated below:

- **9Play2 Employees**
  - Compensation Rate Code = 'SAL'
  - Contract Length = 'F'

- **Wages & Salaries Employees**
  - ABOR Code Description = 'Academic Professional', 'Administrative', 'Classified Staff', 'Merit Pay, Professional', 'Professional School'
  - Compensation Rate Code = 'P'

- **Graduate Academic Employees**
  - ABOR Code Description = 'Graduate Assistant/Associate'
  - Compensation Rate Code = 'SAL'

- **Clinical Assistants**
  - Class Indicator = 'Clinical Assistant'

- **Student Employees**
  - ABOR Code Description = 'Student Worker'

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**University Analytics & Institutional Research**

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What reports will provide information on FY 2022 and FY 2023 Position Distribution?

UAccess Analytics and UAccess Employee provides information on budget, funding, and position distribution for your employees in the following reports:

- **Funding and Compensation Details Report:**
  UAccess Analytics > Employee > Rollover > Funding and Compensation Details

- **Budget and Position Distribution Report:**
  UAccess Analytics > Employee > Rollover > Budget and Position Distribution Report
This report provides the latest job change for an employee. Also, the current and future position funding for a position.
This report provides data on the budget and position distribution for the selected college, department, or account organization.
How does this relate to Fiscal Year End?

Deadlines

- **May 27**: Fiscal Year 2023 Position Distribution account snapshot taken
- **May 30**: Fiscal Year 2023 Position Distribution is available
  - *Effective Dates* 07/01/2022-06/26/2022
- **June 24**: MSS Position Distribution Changes for Fiscal Year 2022
  - *Effective Dates* 06/16/22-06/26/22
- **July 08**: MSS Position Distribution Changes for Fiscal Year 2023
  - *Effective Date* 06/27/22-07/10/22
How do I identify outstanding employee FY/AY 2022 Notice of Appointments?

The **Contracts Past Due** and **Contracts Not Sent to Employees** reports provide details on outstanding employee NOAs.

- **Path to Reports:**
  - UAccess Analytics > Employee > Manager Self Service > Contracts Past Due
  - UAccess Analytics > Employee > Manager Self Service > Contracts Not Sent to Employees

- **Deadline**
  - **June 13:** College Approvers remove, deny or withdraw contracts not accepted for FY 2022
How does this relate to Fiscal Year End?

College and Department Contract Approvers must remove, deny, or withdraw outstanding Notice of Appointments by the end of the fiscal year, or you will not be able to generate new contracts for these employees for FY/AY 2023.
This report lists employees with contracts “Waiting For Acceptance” after 13 days for the Fiscal and 29 days for Academic contract lengths. The 13- or 29-day period begins when the contract is forwarded to the employee for acceptance.
This report provides a list of employees who have not received a contract in Employee Self Service for the current fiscal year. Contracts for employees listed have not been generated by the College or are awaiting action by the College or HR Department Approvers.
Let's not forget our DCCs

UAccess Analytics and UAccess Employee provides information on DCCs that may require action:

- **DCCs Not Extended Report:**
  
  UAccess Analytics > Employee > Manager Self-Service> DCC Not Extended

**Deadlines**

**June 30:** DCC Rollover transactions need to be fully approved
The report provides a list of all Designated Campus Colleagues that have not been extended.
Human Resource Division - Workforce Systems

Website:
- https://hr.arizona.edu/workforce-systems
- https://hr.arizona.edu/hr-resources/calendars
- https://hr.arizona.edu/hr-resources/training-guides

Questions:
- workforcesystems@arizona.edu
See the Future with Oracle ERP

ABOUT THE PROJECT

This multi-phase, multi-year system implementation will provide increased clarity, a more standardized Chart of Accounts, and more streamlined business processes for budgeting and financial management at the University of Arizona. Oracle ERP has been selected as our Financials Modernization solution. The anticipated launch date is July 1, 2024. Visit finmod.arizona.edu for more information or email financialsmodernization@email.arizona.edu.
THE VALUE OF CUSTOMER EXPERIENCE

UAIR is here to provide ongoing customer experience, training, and support. We want the campus community to have the knowledge and the know-how to take full advantage of our products and services.
STILL WANT TO KNOW MORE?

TAKE ADVANTAGE OF OUR KNOWLEDGE. UAIR is here to enhance data literacy and customer experience for campus.

▪ **UAIR Newsletter**
  (the latest news straight from UAIR)

▪ **UAccess Analytics Training**
  (constantly updated modules and materials)

▪ **Analytics Office Hours**
  (visit with our staff to have your individual questions answered)

▪ **UAccess Community**
  (a community of users and resources)

▪ **Data Exploration Series**
  (ongoing data literacy presentations)

Visit our website for more information or to sign-up: [https://uair.arizona.edu/](https://uair.arizona.edu/)
THANK YOU

Let us know how we did. Please take our survey!