DATA EXPLORATION SERIES

University Analytics & Institutional Research

EXPLORE ARIZONA THROUGH DATA

Fiscal Year-End Data

OVERVIEW

- Introduction
- Overview of Fiscal Year-End
- Focus on Financial Reporting
- Focus on Employee Reporting
- Q&A
- Financials Modernization
- Wrap up

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.

- Data Warehouse
- UAccess Analytics & Reporting
- External Reporting & Rankings
- Interactive Fact Book
- Customer Experience & Support
- Data Science
- System Performance

ACKNOWLEDGEMENTS

TODAY'S PRESENTERS

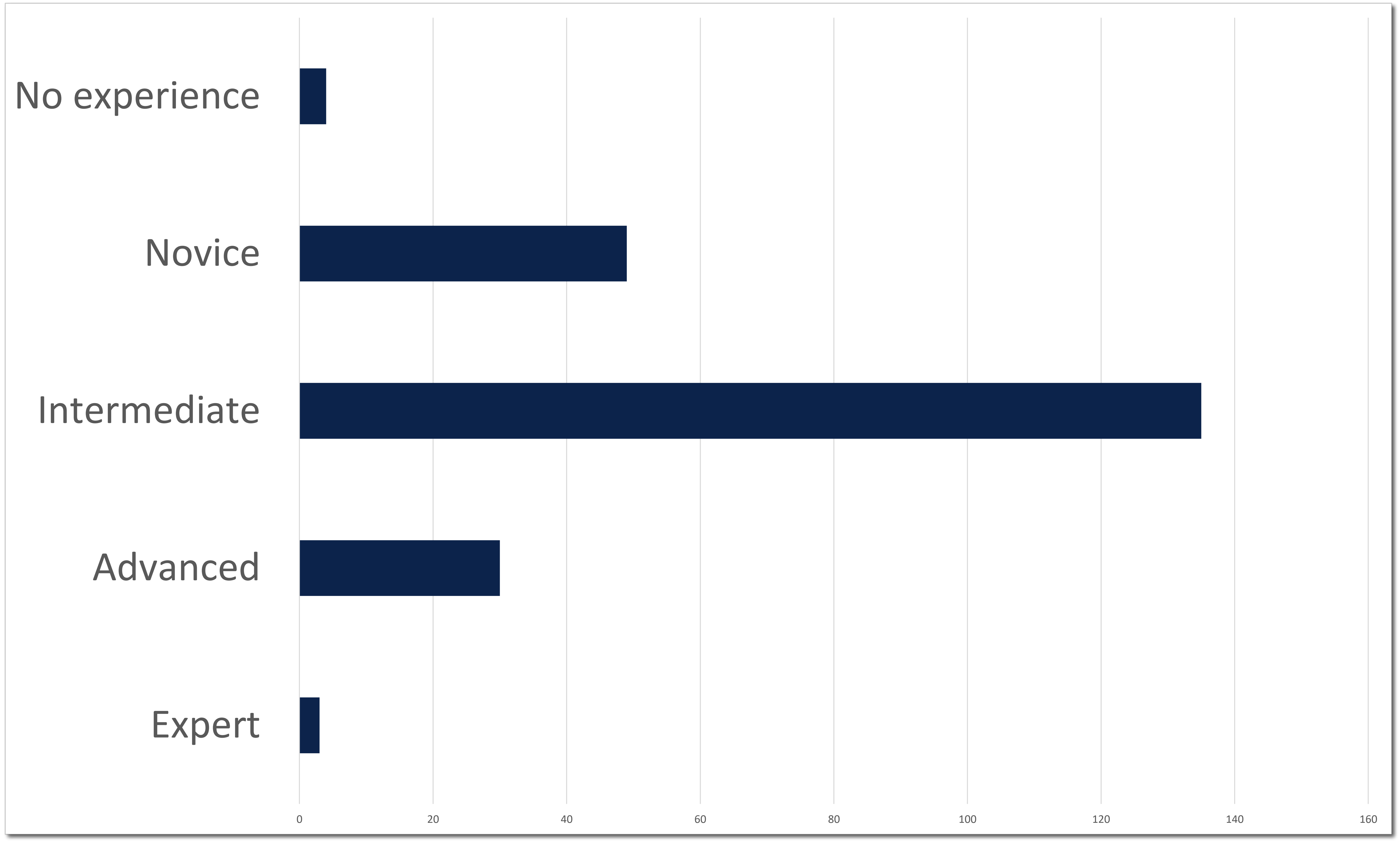
- Christopher Cherry, IT Training & Support Specialist
- Bethany Prim, Assistant Comptroller, Financial Services
- Abraham Silva, Program Manager, Administrative Data
- Abbie Montenegro, Director, Workforce Systems
- Mary Baum, Manager, Initiatives & Outreach, Financial Services

TODAY'S PANELISTS

- Elvira Fike, Business Analyst, Senior, Financial Services
- Janet Gurton, Business Analyst, Principal, Financial Services
- Mitch Owen, Senior Business Intelligence Developer, UAIR
- Jennifer Pfennig, Senior Manager, Accounting, Financial Services
- Angelica Toledo, Business Analyst, Senior, Workforce Systems
- Jeff Schwarz, Business Intelligence Developer, UAIR

WELCOME | Who is here today?

Question: Please rank your level of experience with UAccess Analytics.



WELCOME | What do you want to know?

How to retrieve data efficiently to support reporting and budgeting efforts

Where to find resources for the Fiscal Year-End process.

Are there any changes this year?

Which reports are important for the year-end and closing.

What reports are available to help me?

What are the best dashboards for pulling up income & expenses?

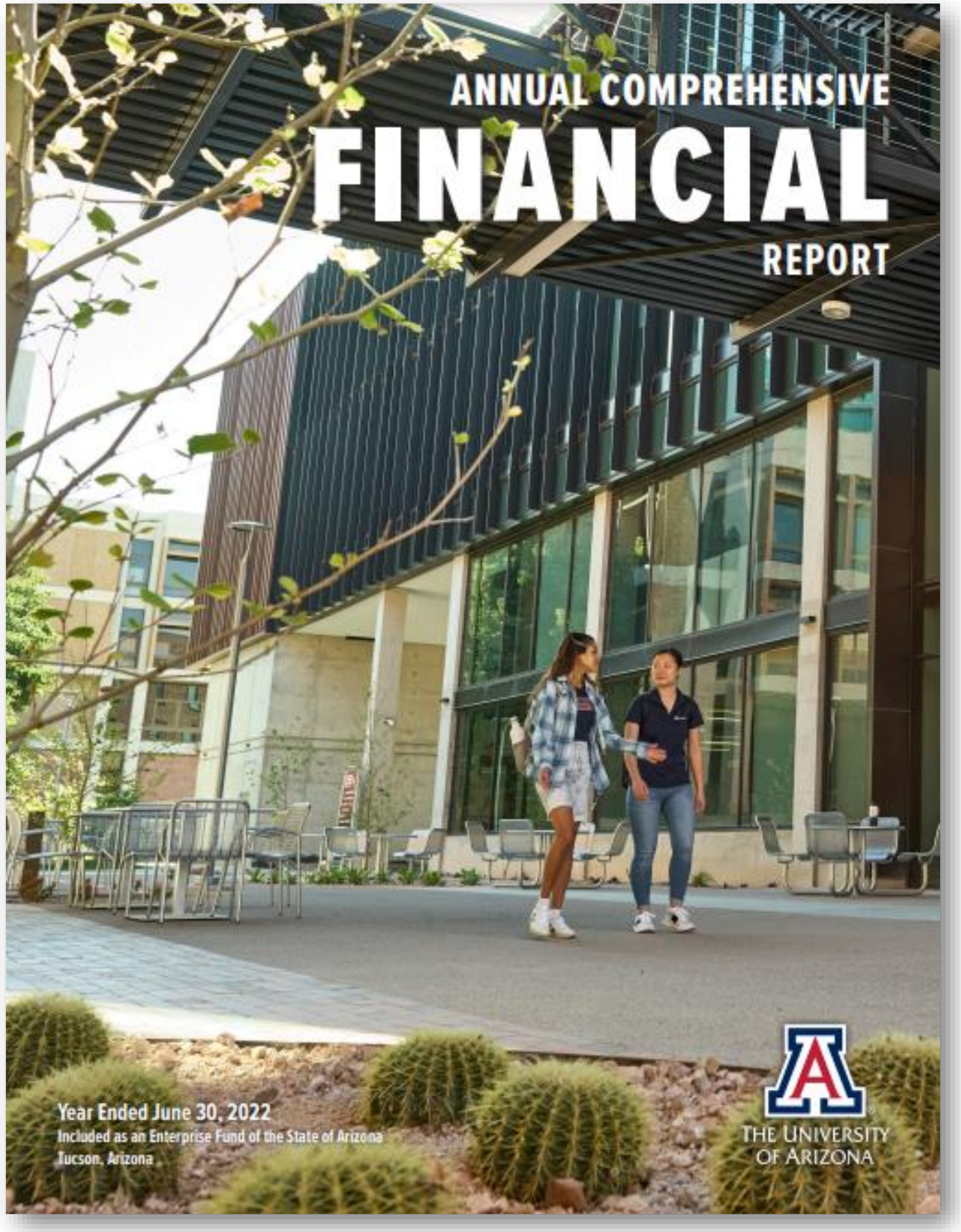
Fiscal Year-End Background & Important Deadlines

Overview of Fiscal Year-End

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://financialservices.arizona.edu/accounting/annual-reports



FISCAL YEAR-END BACKGROUND

- The ACFR provides the University'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

- All of campus plays a critical role in the fiscal year-end closing 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 fiscal year 2023.
- Supporting documentation must be attached in UAccess Financials.

YEAR-END INFORMATION

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

https://financialservices.arizona.edu/accounting/year-end

Year-End Information

Fiscal Year-End 2023

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

Tutorials and Training

- Accounts Payable Year-End 2023 (coming soon)
- Accounts Receivable - Inventory Year-End 2023 (coming soon)
- Data Exploration Series: Focus on Fiscal Year-End Data

A/R - Inventory Reporting Resources

- Accounts Receivables Schedules (coming soon)
- Inventory Schedules
- Other schedules (Used to report Unearned Revenue, Deposits, Prepaid Expenses and Accrued Expenses)

COMMUNICATIONS

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

https://financialservices.arizona.edu/

BUSINESS OFFICES NEWS

Join the **University Business Offices** email list to receive information about the UAccess Financials system, applicable policies and procedures, and important notices from Financial Services to University of Arizona business offices. **NOTE**: Employees with *Business and Administrative User Access (Role 54)* are automatically subscribed to this list. All other employees may opt-in using the Subscribe link below.

SUBSCRIBE TO EMAIL LIST

IMPORTANT DATES

- Important dates to prepare for fiscal year-end begin in May.
- A detailed list of dates can be found here:

https://financialservices.arizona.edu/accounting/year-end/dates-fy2023

Important Dates - Fiscal Year-End 2023

For general year-end assistance, please contact **FNSV-Outreach@arizona.edu**.

ITEM	DEADLINE	ANALYTICS	NOTES
Last day for departments to submit Purchase Requisitions	Friday, May 5	N/A	Last day for departments to submit fully approved Purchase Requisitions to Purchasing to ensure the order is placed, delivered, and paid in FY 2023.
Begin departmental review of FY 2023 account setups and attributes	Friday, May 5	N/A	Departments should begin review of their accounts for any FY 2023 changes that need to be made.
Requisitions and POs can be created for FY 2024	Monday, May 8	N/A	Requisitions and Purchase Orders can now be created for FY 2024.
Begin dual updating of maintenance tables	Monday, May 8	N/A	All Sub-Object Codes and Project Codes will need to be maintained in both FY 2023 and FY 2024.
Budget Organization Changes (Reorganization/Dept. Title/Account Remapping)	Friday, May 12	N/A	Deadline for approved reorganization/ department title/account remapping changes to the Office of Budget and Planning.
Purchase Order Amendments	Friday, May 12	N/A	Last day for departments to submit fully approved amendments to Purchasing to ensure the amendment is processed in FY 2023.
Transfer of Funds (TFs) for Endowments	Monday, May 15	N/A	Last day to submit endowment TFs to guarantee they will be processed for FY 2023.
Change expiration dates for accounts	Wednesday, May 24	N/A	Last day to update account expiration dates in UAccess Financials to extend an account into the new FY for purposes of payroll funding. Transactions to update account expiration dates must show final in Financials by May 26. Account expiration changes made after this date will also require account changes to funding in UAccess Employee.

YEAR-END OVERVIEW

- Interim close of FY 2023 period 12 is Friday, June 30, 2023.
- Corrections can be made using year-end documents through Friday, July 14, 2023.

https://financialservices.arizona.edu/accounting/year-end/overview-fy2023

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:

STANDARD EDOC	YEAR-END EDOC
Distribution of Income & Expense (DI)	Year-End Distribution of Income & Expense (YEDI)
General Error Correction (GEC)	Year-End General Error Correction (YEGC)
Transfer of Funds (TF)	Year-End Transfer of Funds (YETF)
Salary Transfer (ST)	Year-End Salary Transfer (YEST)

- **Friday, July 7, 2023:** All capital equipment year-end documents with capital object codes (5750/76XX/77XX) need to be approved by 5 p.m.
- **Friday, July 14, 2023:**
  - All department originated corrections need to be initiated by 2 p.m. and approved by 5 p.m.
  - Administrative Service Charge (ASC) distributions to sub-accounts, sub-object codes, and project codes can be made using the YEDI and YEGC. Documents for movement of ASC must be initiated by 2 p.m. and approved by 5 p.m.
  - All YESTs related to Salary Expense Transfers must be initiated by 2 p.m. and approved by 5 p.m.

FUND ACCOUNTANT SERVICES

Financial Services provides accounting advisory services to University departments.

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

https://financialservices.arizona.edu/accounting/fund-accountants

References & Guides:

https://financialservices.arizona.edu/accounting

Who is my Fund Accountant?

Fund Accountant services are provided by several teams. Identify the Fund and Sub-Fund Code for your account to find your Fund Accountant Team below. Click on the team name for contact information.

If you don't know the Fund and Sub-Fund Code for your account: Go to UAccess Financials main menu > Chart of Accounts > Account.

FUND CODE	SUB-FUND CODE	DESCRIPTION	FUND ACCOUNTANT TEAM
DI,OR,SP		Indirect Cost Recovery, Restricted Gifts, Sponsored Projects	**Sponsored Projects**
LN,OR	PRVSCH,FWSGRT,GOVGRT	Loan, Private Scholarships, Fed Work Study Government Grants, Government Grants	**Student Financial Aid Accounting**
EN		Endowment	**Endowment Accounting**
CA		Cash and Banks	**Bursar Accounting** **Cash Accounting**
PL		Plant Funds - Construction, Plant Funds - Debt Service	**Plant Funds-Construction** **Plant Funds-Debt**

For All Other Fund/Sub-Fund Codes

Enter your Department Name or Number in the search below to find your Fund Accountant Team.

SEARCH

Essential UAccess Analytics for Managing Accounts

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

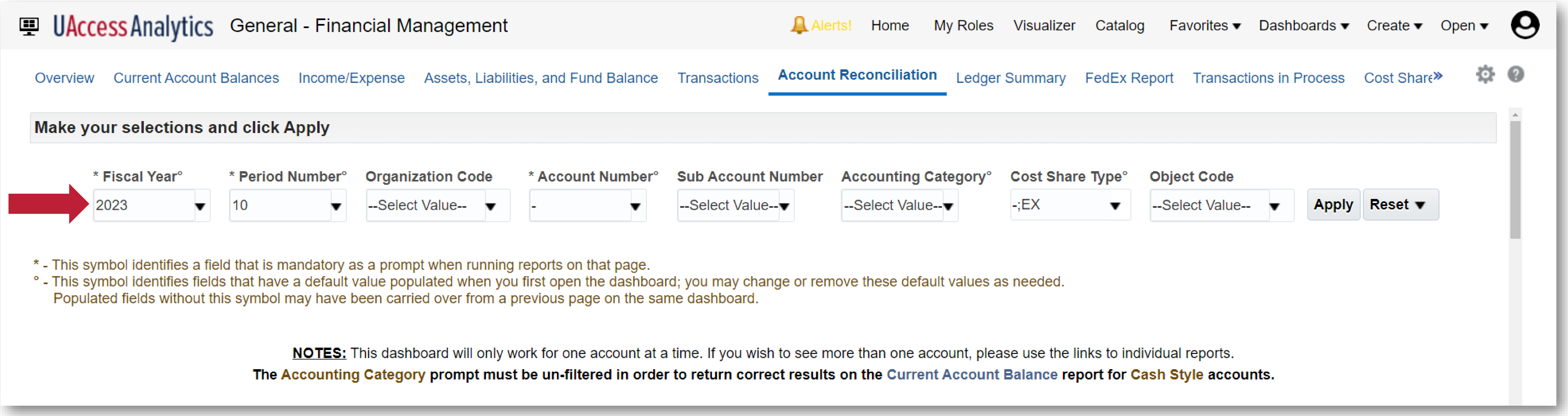
Where can I go to find information for account reconciliation?

The **Account Reconciliation** tool provides seven different reports for a single account number, providing a good overview of the account's 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.

Path to Reports:
UAccess Analytics Dashboards > Financial > General – Financial Management > Account Reconciliation

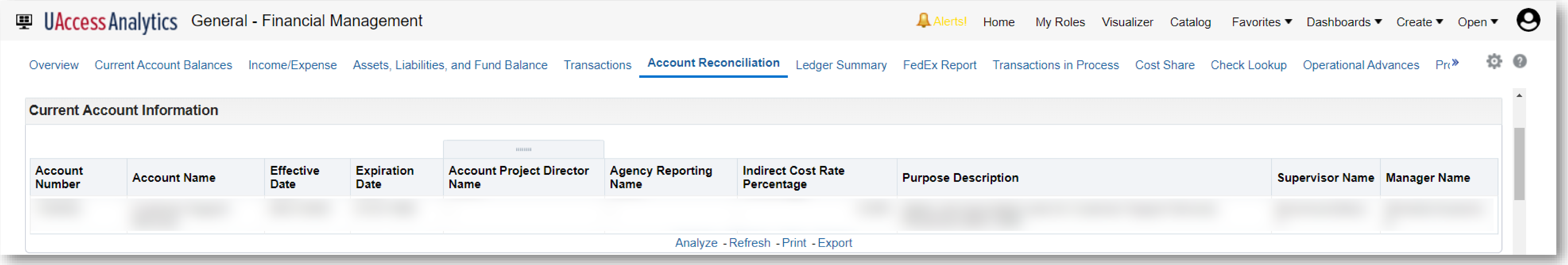
ACCOUNT RECONCILIATION REPORTS

- Current Account Balance
- Income / Expense
- Encumbrances and Pre-Encumbrances
- Transactions
- Open Operational Encumbrances
- Payroll Expenditure Listing
- Position Encumbrance Detail

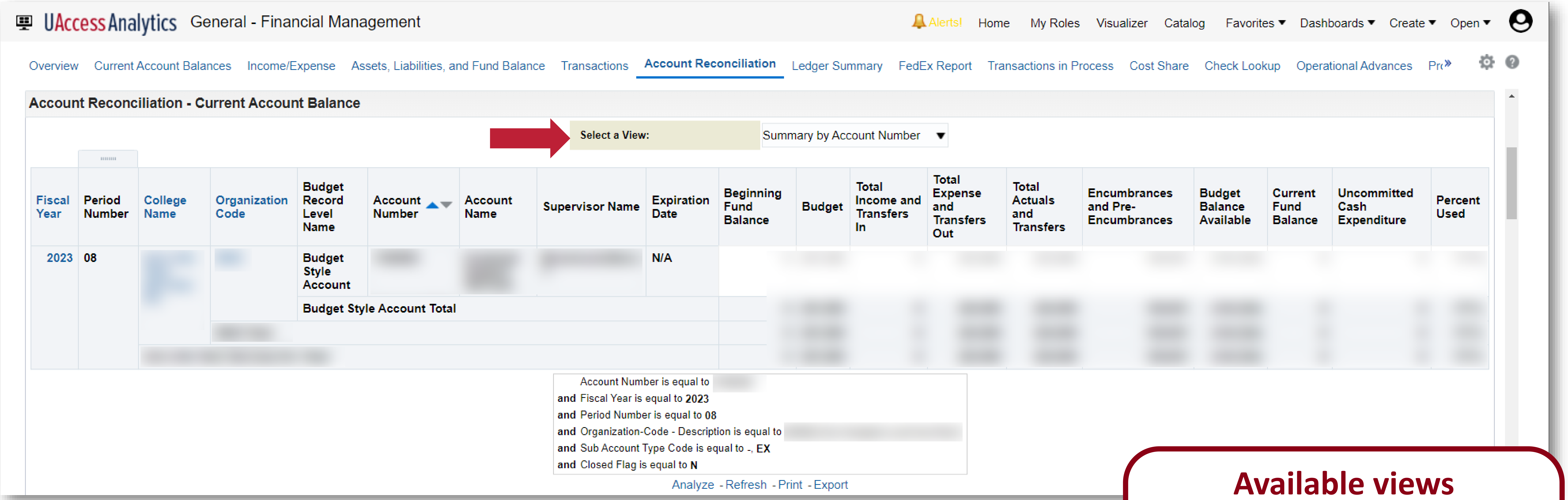


Select the fiscal year, period number, and account number to filter reports.

Current Account Information



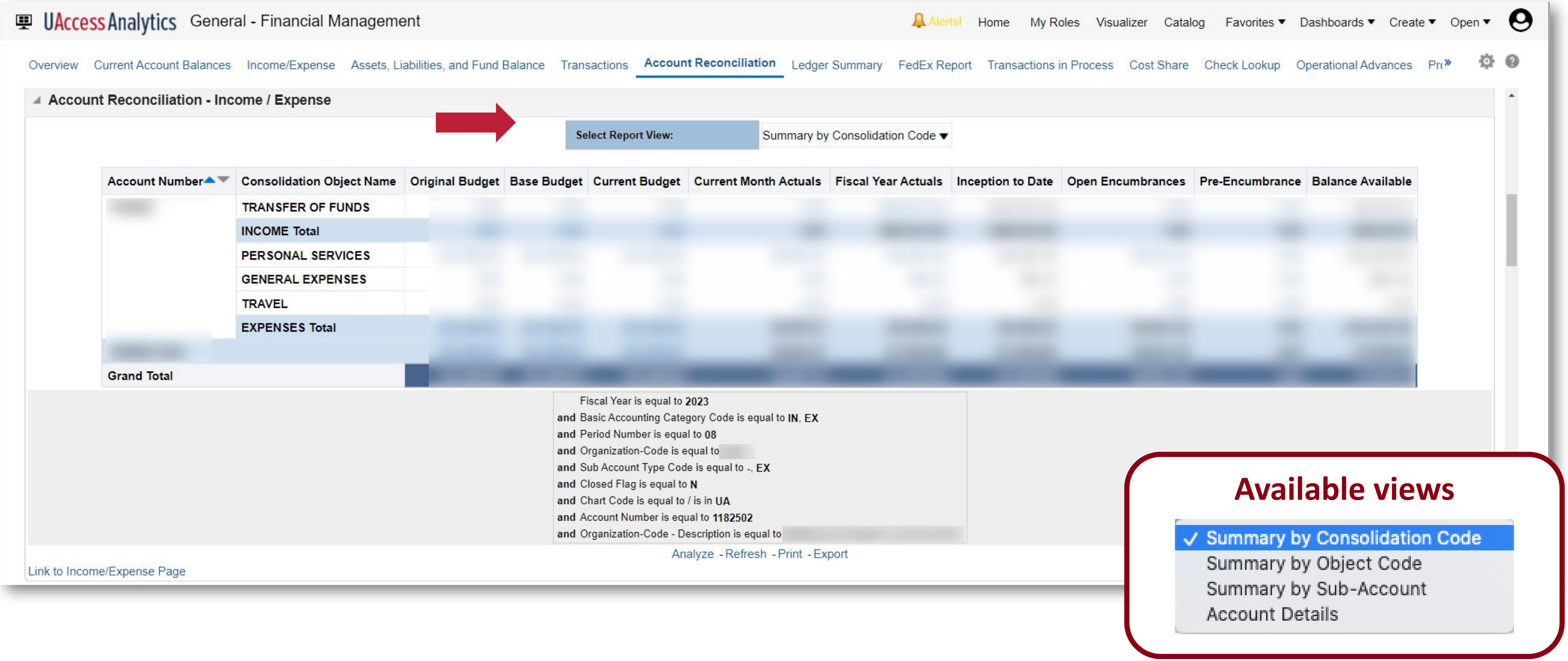
This report gives the current information for the account including supervisor and manager names.



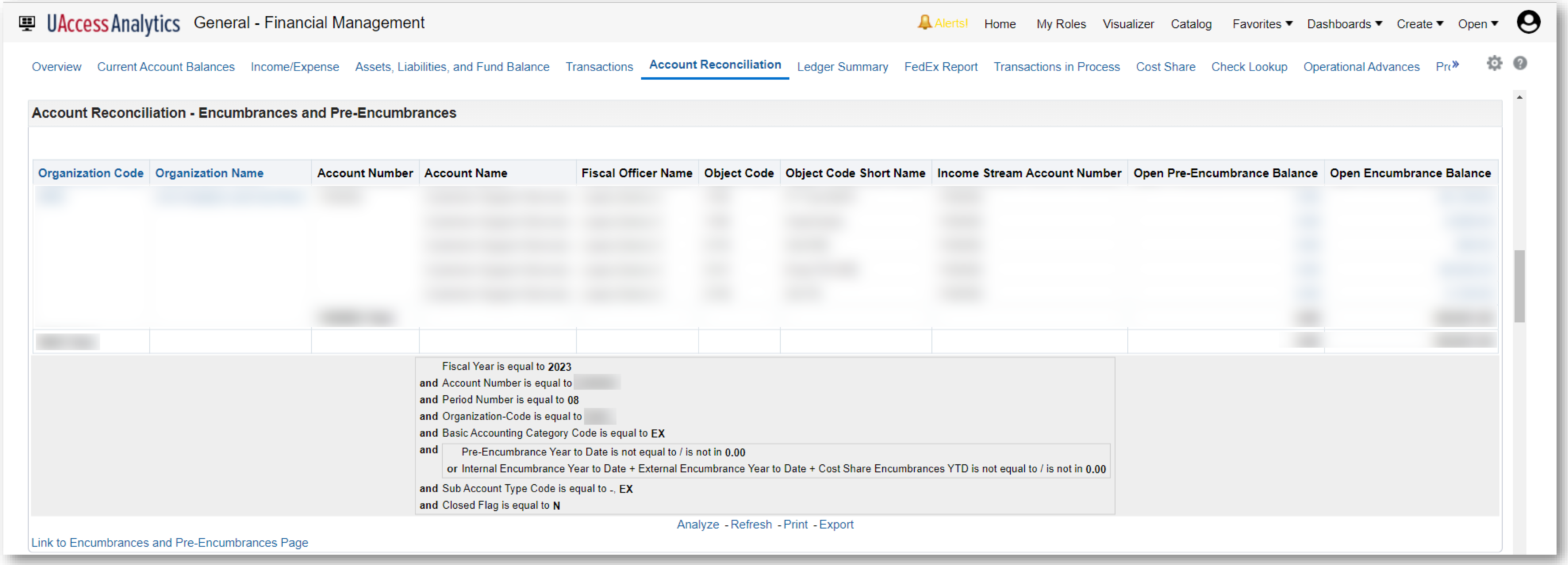
Available views

- ✓ Summary by Account Number
- Detail by Account Number
- Details By Sub Account Number
- Details by Object Code
- Detail by Object Code Level

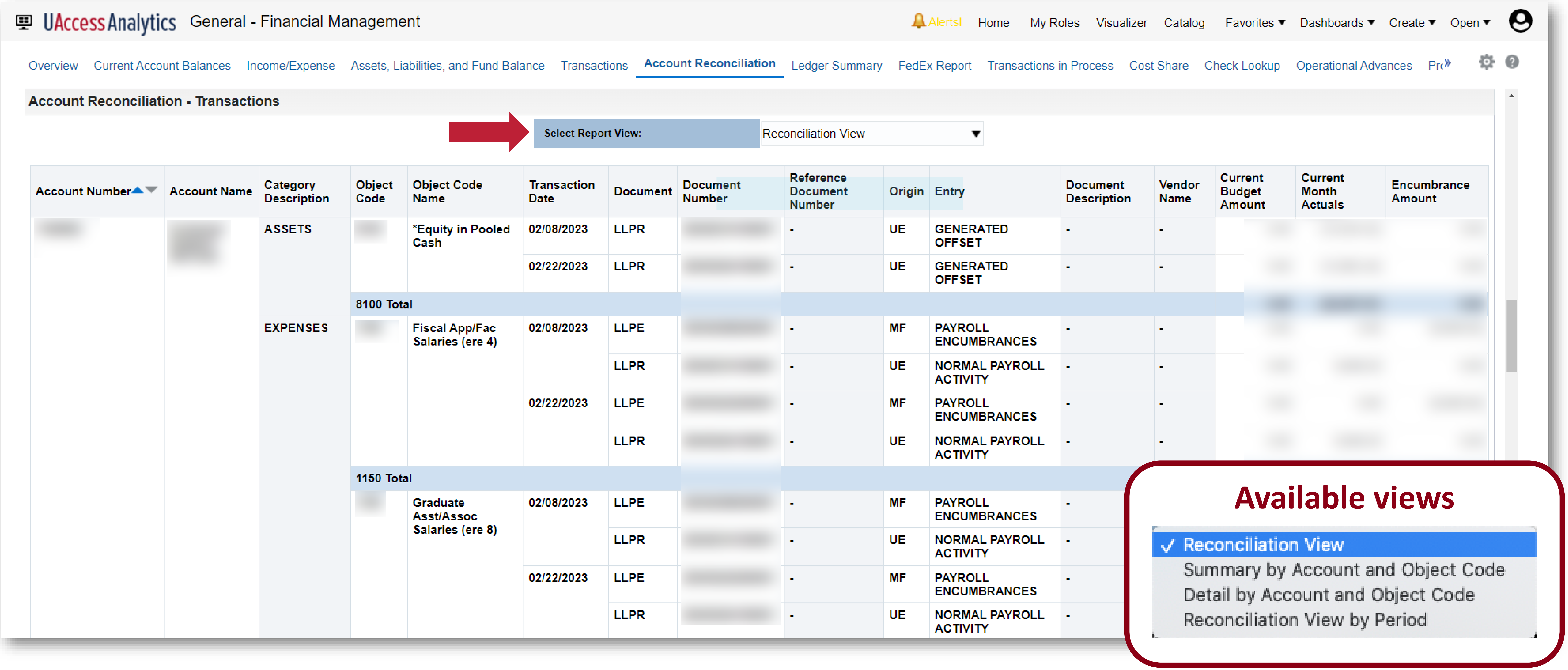
This report details information on budget, income, expense, transfers, current balance, etc. for the selected account.



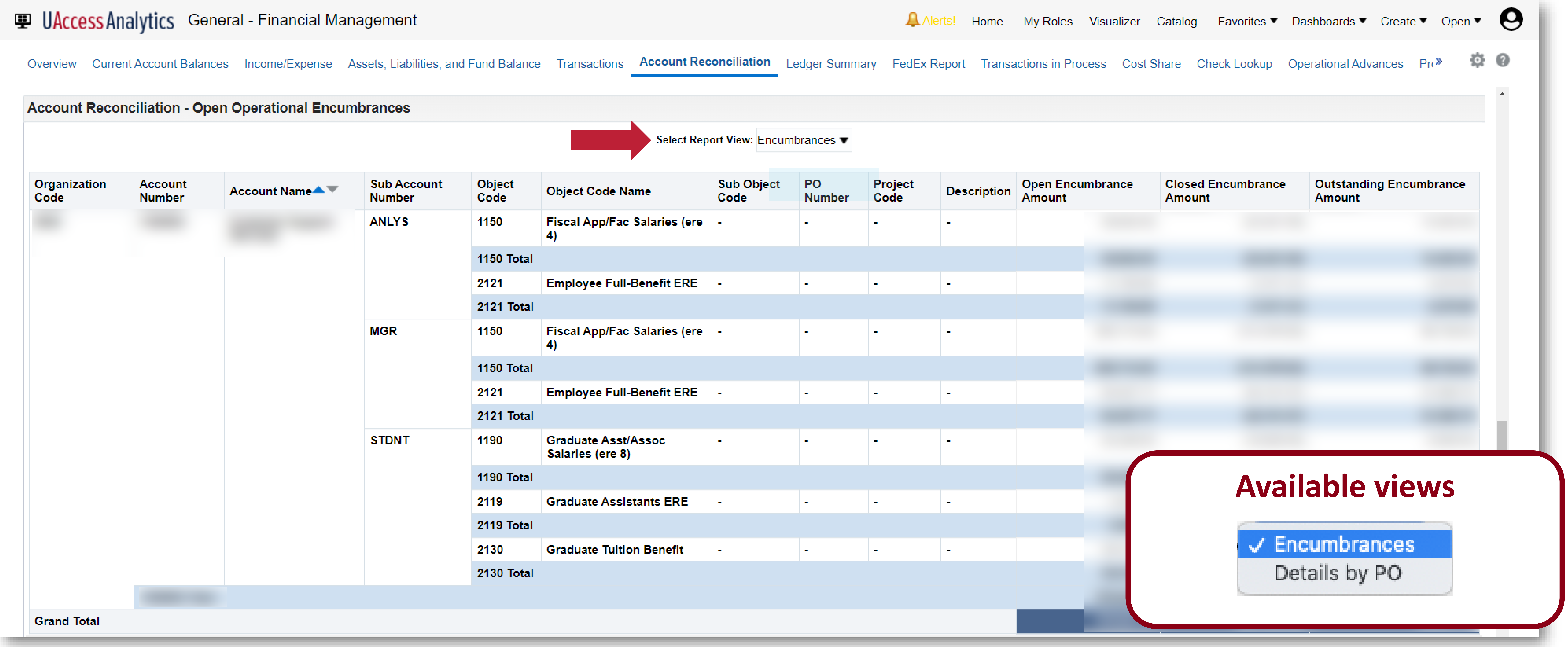
This report gives details on income and expenses for the selected account.



This report details encumbrances and pre-encumbrances for the selected account.

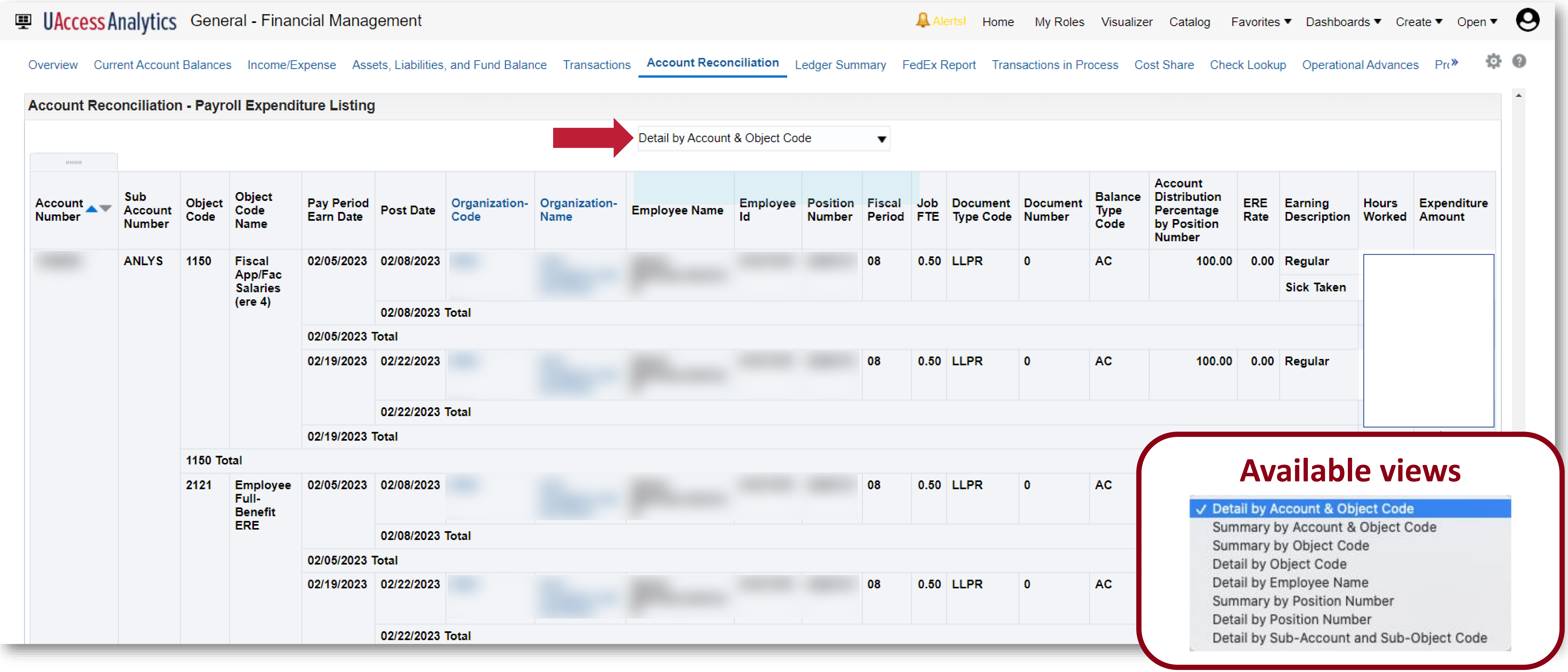


This report details transactions for the selected account.



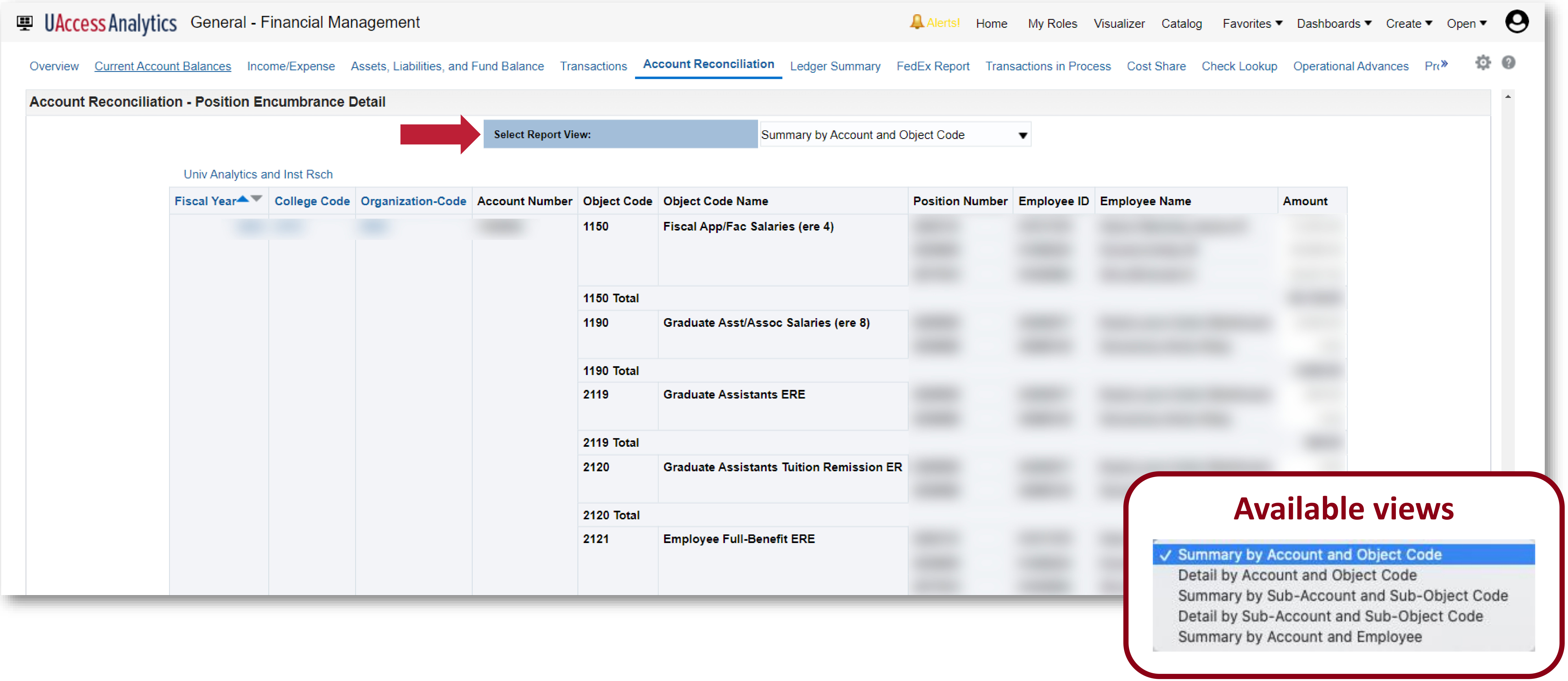
This report details transactions for the selected account.

Payroll Expenditure Listing



This report details payroll expenditures for the selected account.

Position Encumbrance Detail



This report details position encumbrances for the selected account.

What tool can 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.

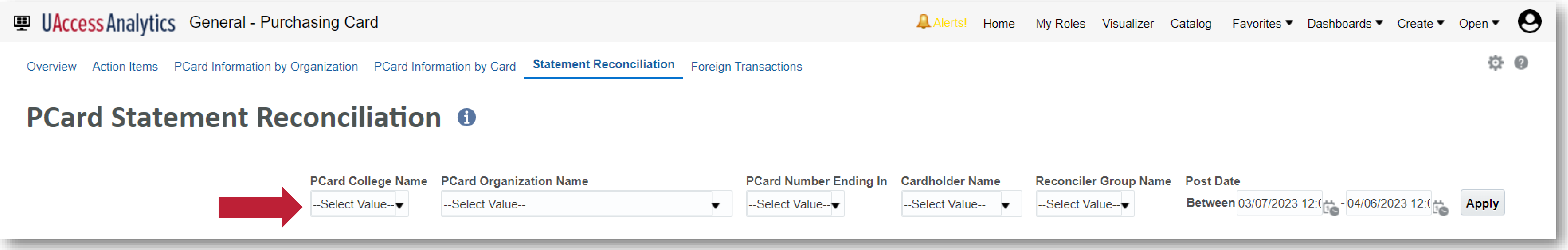
https://financialservices.arizona.edu/payments/pcard

What information and documentation is required for PCard purchases?

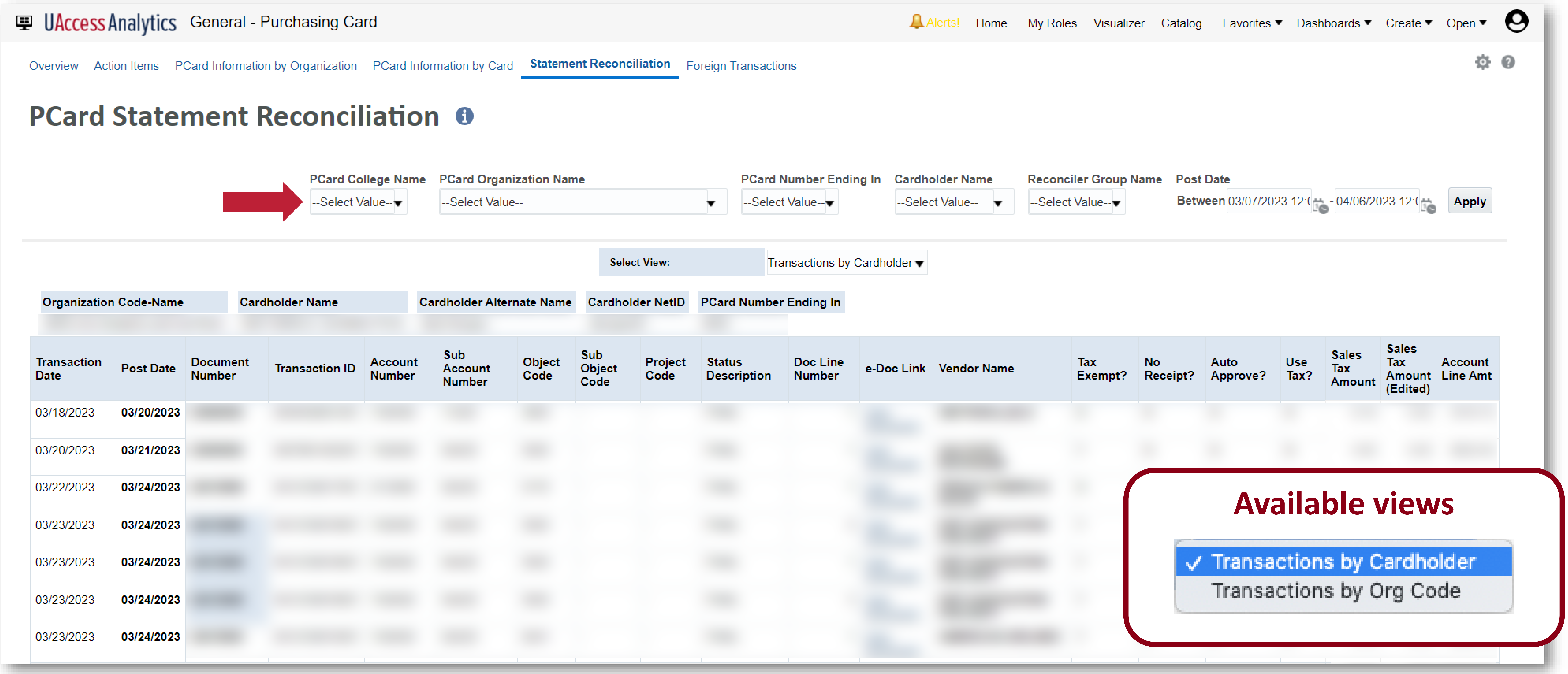
All PCard transactions (PCDO) must include:

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://financialservices.arizona.edu/accounting/business-purpose
3. In addition to the business purpose, some common PCard purchases require additional documentation.

See the PCard Compliance page for details:
https://financialservices.arizona.edu/payments/pcard/guidelines



Select the filters for the report.

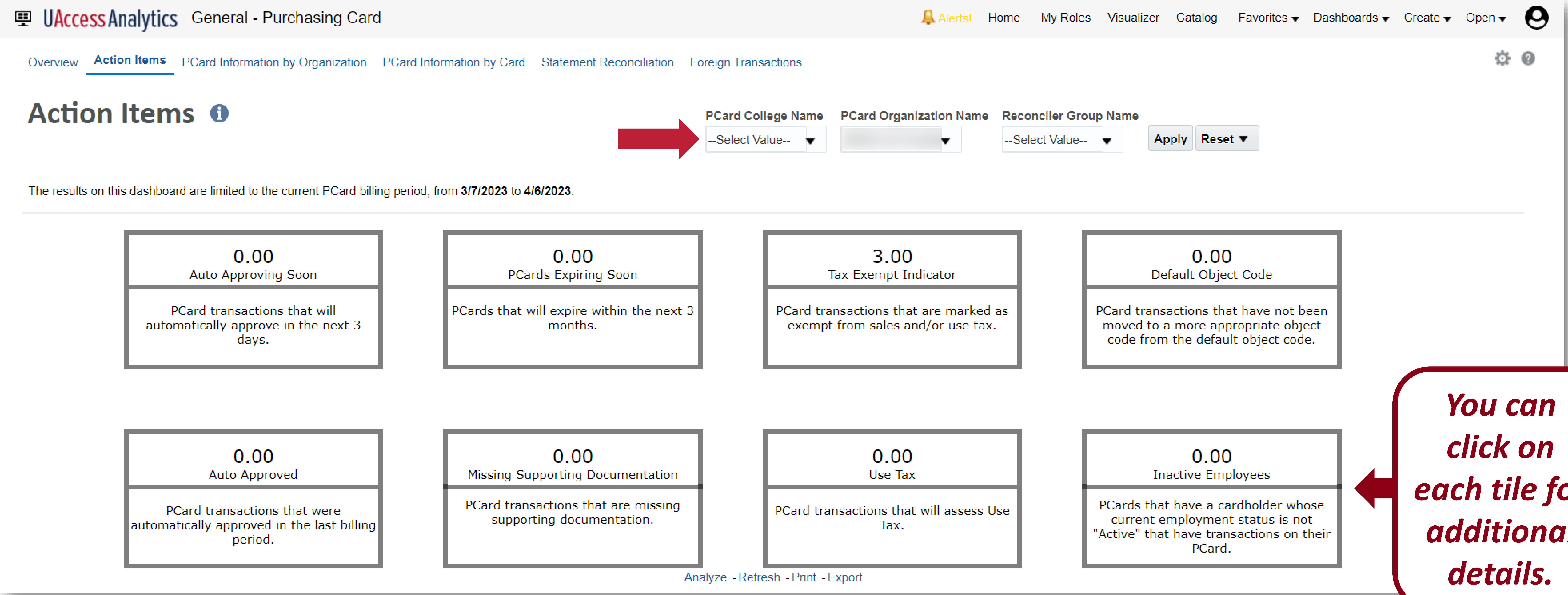


This report details purchasing card transactions for a selected account and time period (Post Date).

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

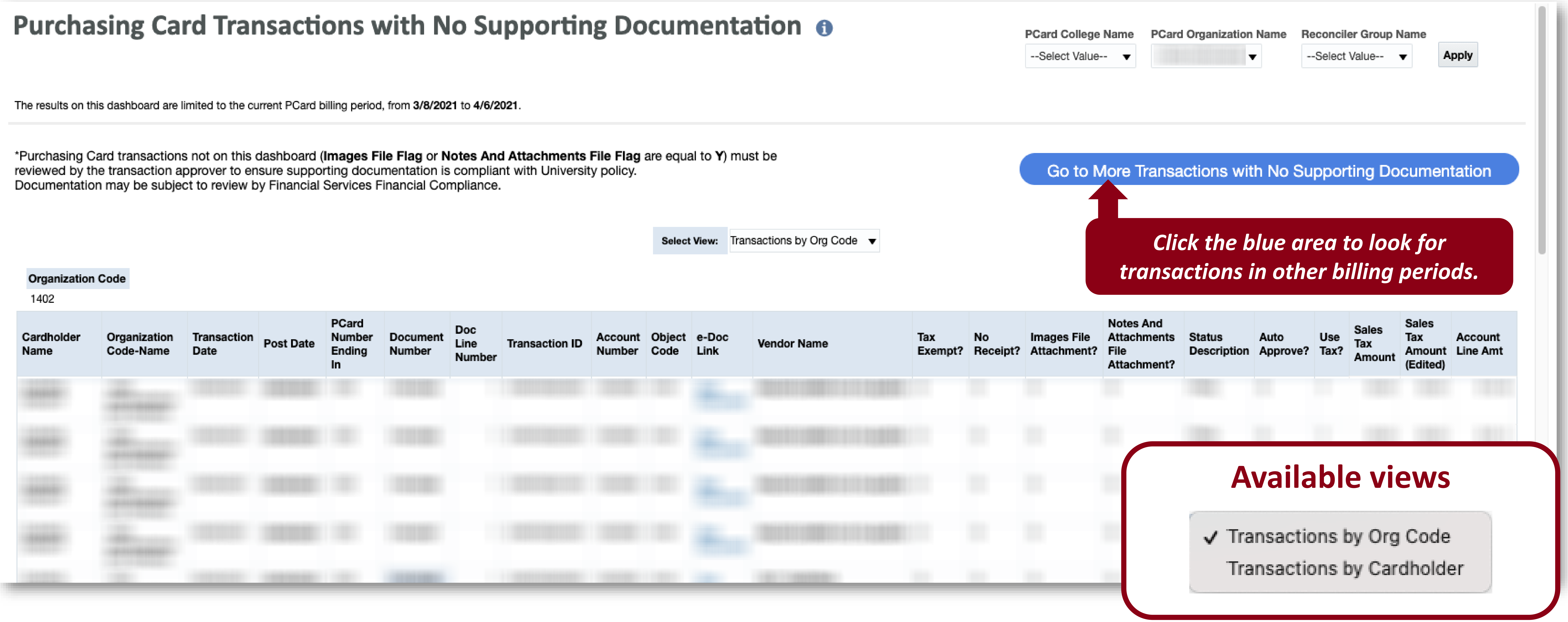


You can click on each tile for additional details.

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.

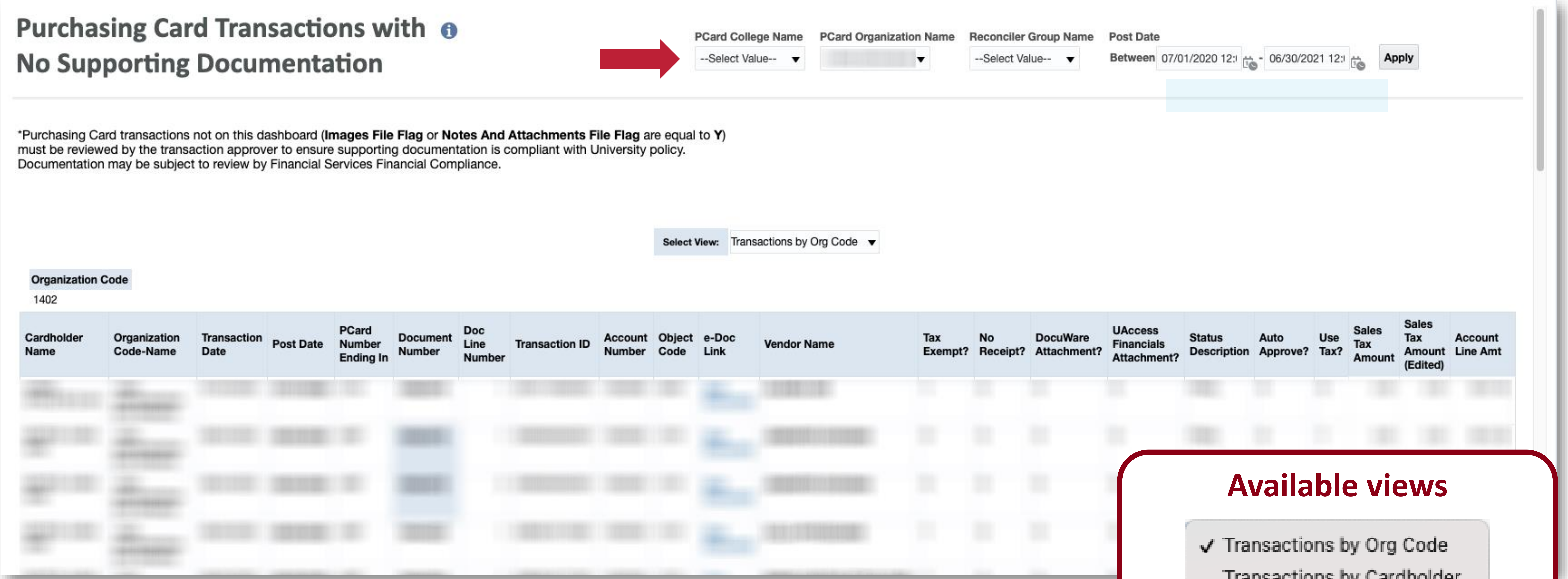
Note: This only shows the current period until you open it, so even if it says 0, you will still want to open the box.

Purchasing Card Transactions with No Supporting Documentation



This report shows the details on PCard transactions with no supporting documentation for the current billing period.

Purchasing Card Transactions with No Supporting Documentation



Available views

- ✓ 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?

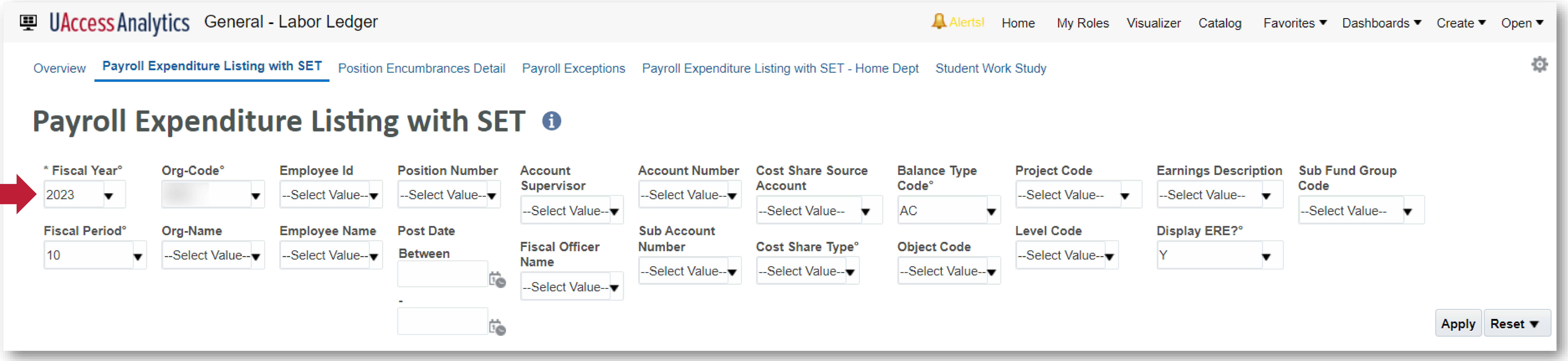
The **Payroll Expenditure Listing with SET** dashboard report shows payroll expenditures and salary expense transfers (SET) for a department. There are pivots to show the data in summary and in detail, listed by department, object code, employee, etc.

Path to Reports:
UAccess Analytics Dashboards > Financial > General – Labor Ledger > Payroll Expenditure Listing with SET

How does this relate to Fiscal Year End?

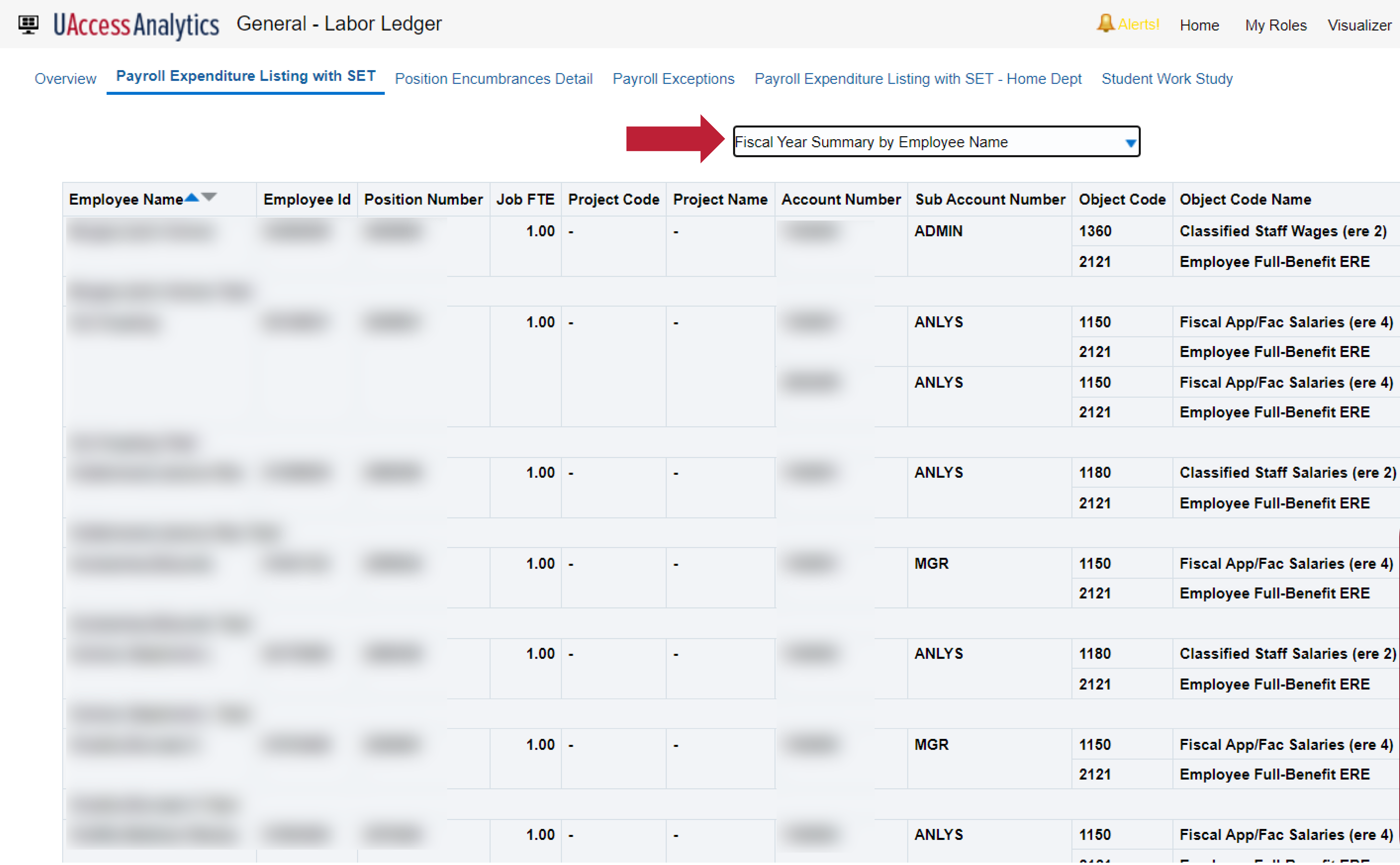
The **Payroll Expenditure Listing with SETs** allows you to review payroll and make any necessary adjustments prior to the end of the Fiscal Year. There is a specific view titled *Fiscal Year Summary by Employee Name* that provides a good overview of where an employee was paid from throughout the year.

Payroll Expenditure Listing with SET

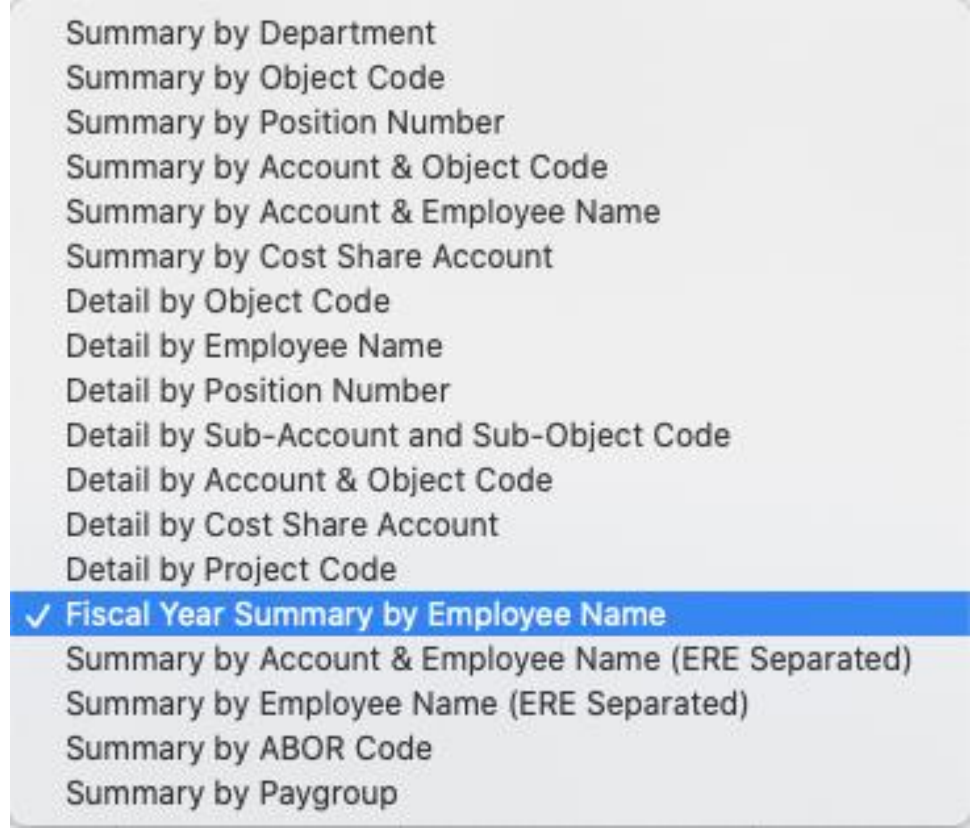


Select the fiscal year, fiscal period, and organization code to filter the report.

Payroll Expenditure Listing with SET



Available views



This report details Payroll Expenditures and Salary Expense Transfers.

How do I know what fund transfers are allowed between different accounts?

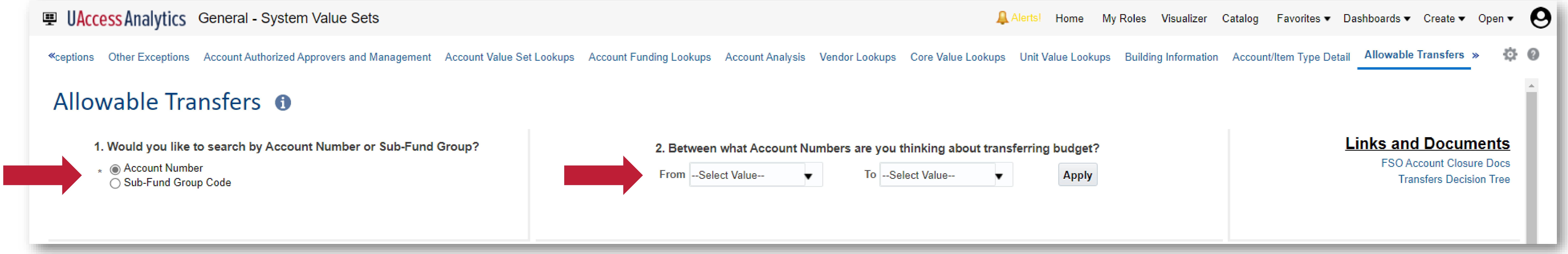
The **Allowable Transfers** dashboard is designed to assist you in learning the rules and appropriate transfer documents to use in processing the movement of funds between different accounts and sub-funds.

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

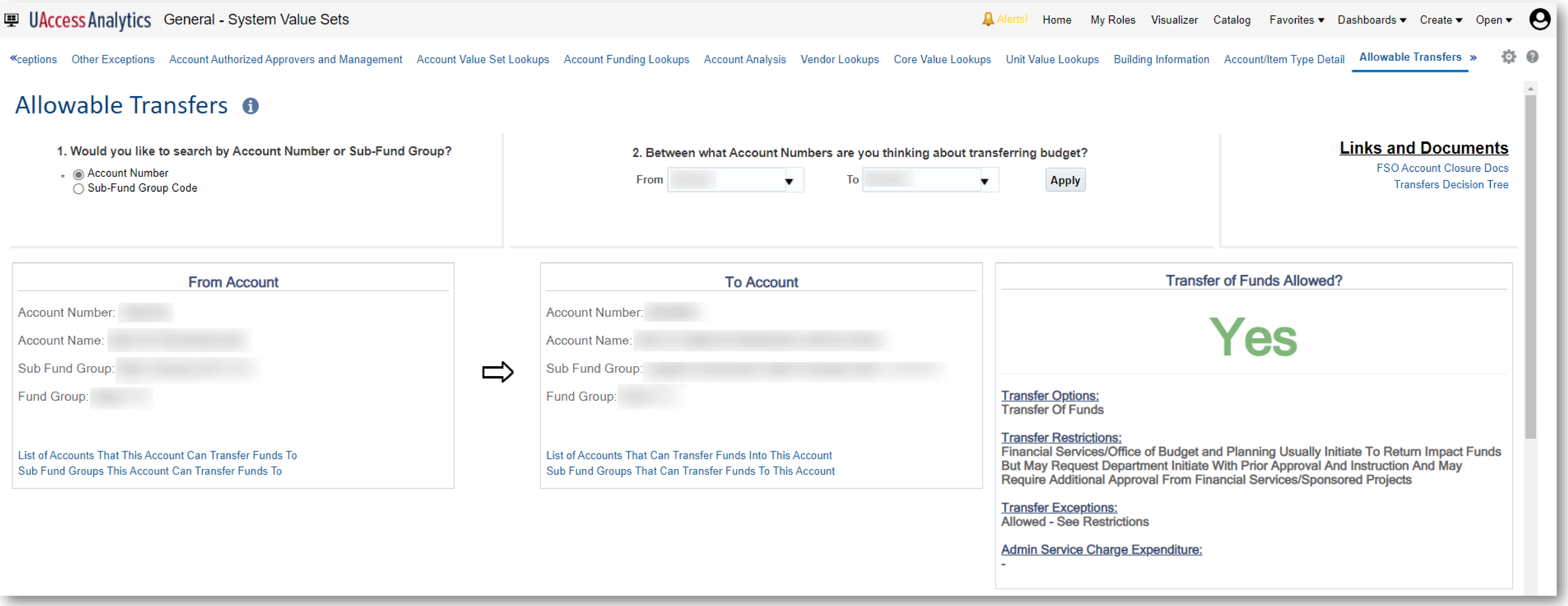
How does this relate to Fiscal Year End?

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.

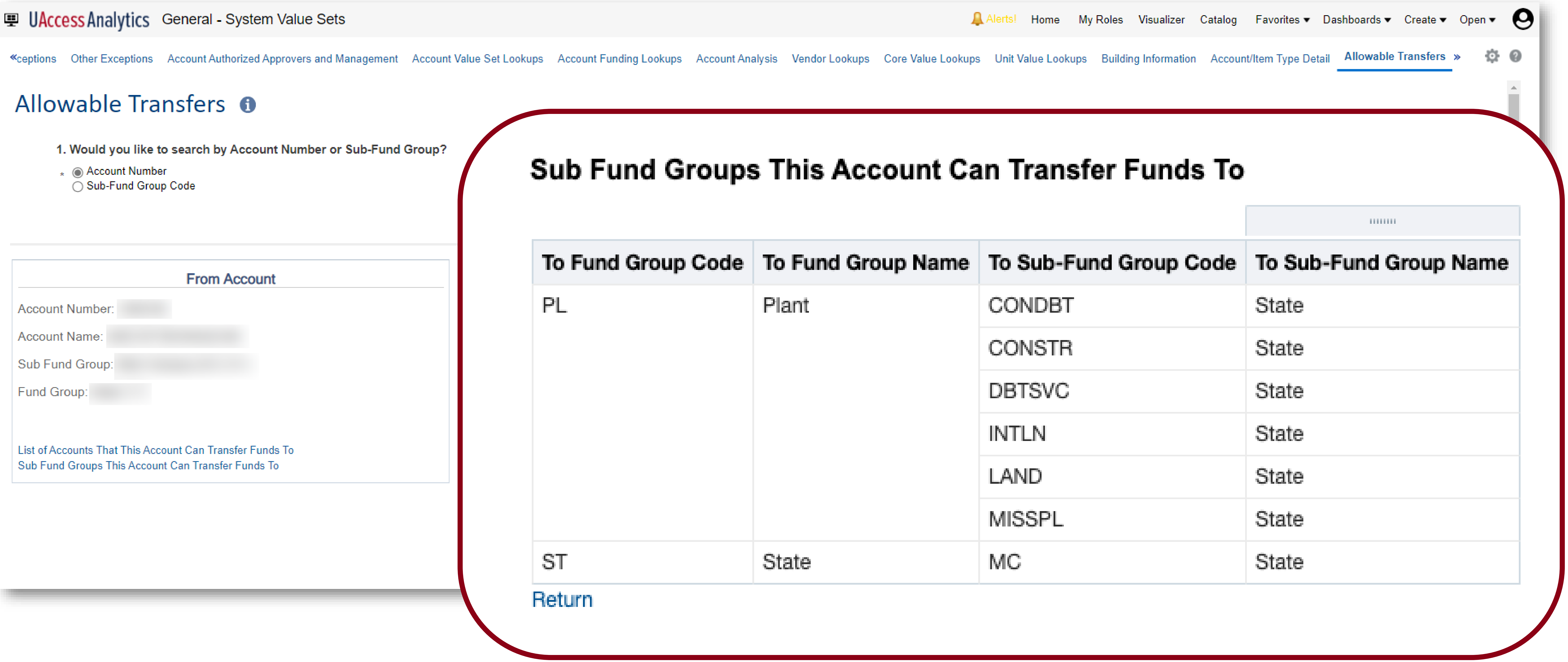


Select Account Number or Sub-Fund Group Code and set the values you would like to use to filter the data.

Allowable Transfers



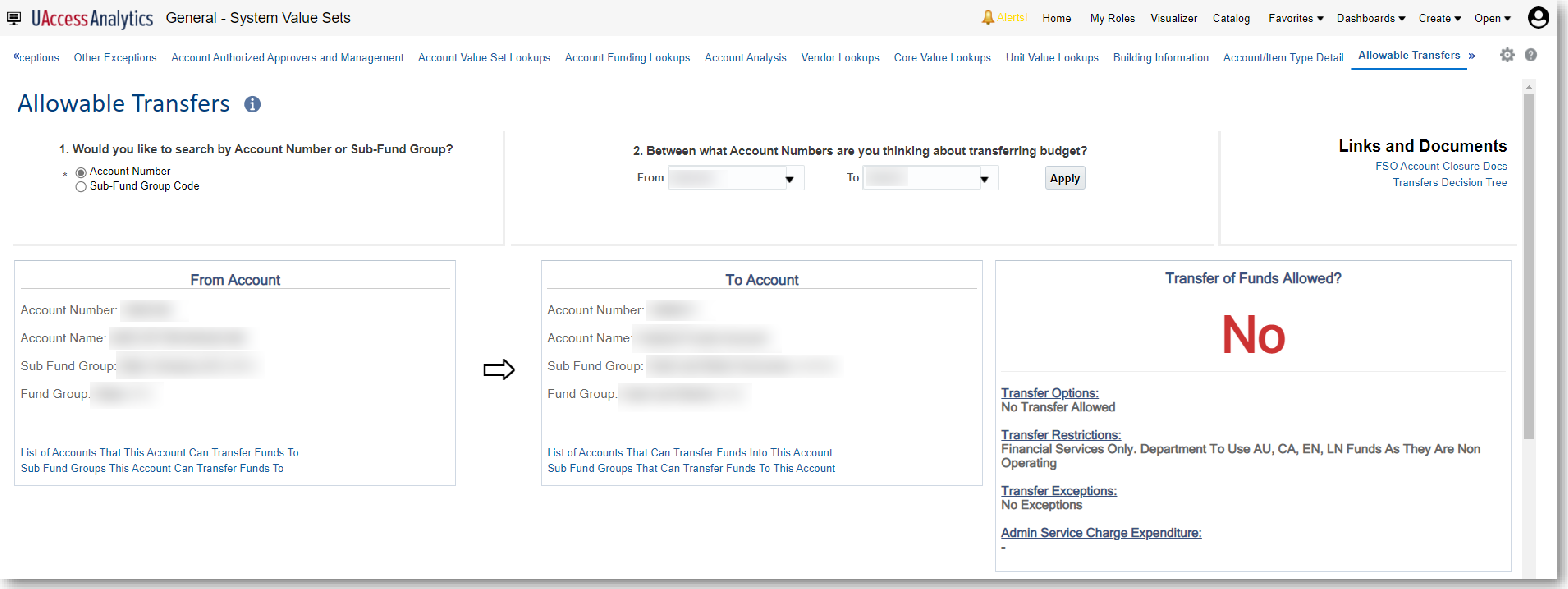
This report shows an allowable transfer of funds result. You can pull detailed lists of accounts and sub-fund groups this account can transfer to. Additionally, you can see what transfer options are available to you in the YES outcome.



To Fund Group Code	To Fund Group Name	To Sub-Fund Group Code	To Sub-Fund Group Name
PL	Plant	CONDBT	State
		CONSTR	State
		DBTSVC	State
		INTLN	State
		LAND	State
		MISSPL	State
ST	State	MC	State

Return

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 FY2023?

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:

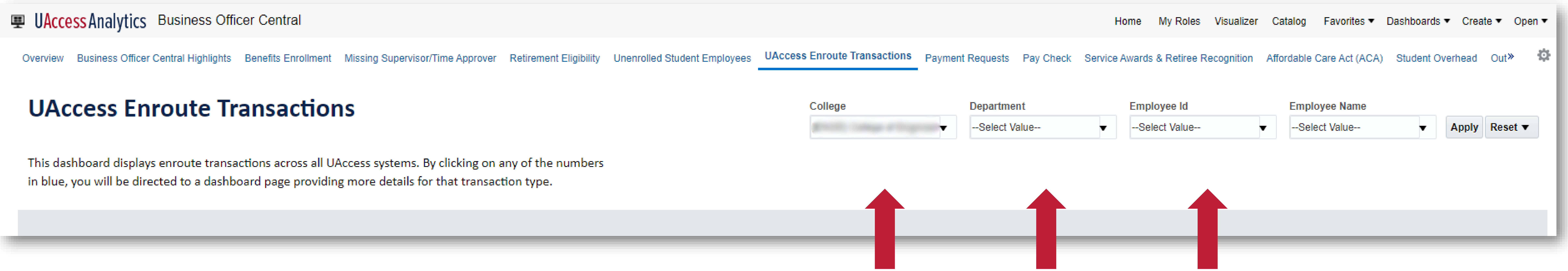
- **Transactions Pending Approval**
- **Transactions Initiated**

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://financialservices.arizona.edu/accounting/year-end/dates-fy2023



Select the individual, organization, or college. Then select a transaction type you would like to use to filter the data.

UAccess Enroute Transactions

Financials

835

Transaction Type	Initiated	Pending Approval
Grand Total	143	692
Account	1	1
Account Delegate	1	1
Budget Adjustment		1
Cash Receipt	1	
Disbursement Voucher	112	30
Effort Certification		244
General Error Correction	1	
Internal Billing		7
Payment Request		13
Procurement Card		373
Requisition	17	18
Salary Expense Transfer	7	3
Transfer Of Funds	1	1
Vendor	2	

Employee

787

Transaction Type	Initiated	Pending Approval
Grand Total	533	254
Approval for Additional Job	4	3
Approval for Supplemental Comp	6	
Create or Modify Positions	13	
Grads NoAs	9	6
I9 Form Approvals	293	4
Job Change Approvals	183	149
MSS Campus Colleague	5	
MSS Exception	4	1
MSS New Hire	4	2
MSS Personal Info Update	4	
MSS Title & Tenure	1	
Position Funding Change		85
Terminate Employment	3	
Year End DCC Rollover	4	4

Research

11

Transaction Type	Initiated	Pending Approval
Grand Total	11	
New	10	
Revision (continuation/supplement, not yet routed)	1	

Budget

31

Transaction Type	Initiated	Pending Approval
Grand Total	16	15
Budget Transfer	16	15

Click on the number of transactions to bring up a detailed report of items.

UAccess Analytics Business Officer Central

Home | My Roles | Visualizer | Catalog | Favorites ▾ | Da

Enroute Transaction Details | **Financials (KFS)**

Transactions on this report have a pending workflow step.

Transactions Pending Approval Detail

Document Type	Date Created	Document Number	Document Title	Link to eDoc	Initiator	Pending With
Disbursement Voucher	03/16/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/06/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/18/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/20/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/22/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
						[illegible]
	04/25/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/25/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/26/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/26/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/26/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/27/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/27/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/27/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/28/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
						[illegible]
	04/28/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/28/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/28/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]
	04/28/2022	[illegible]	[illegible]	View Document	[illegible]	[illegible]

Rows 1 - 20

Understanding Important Employee and Designated Campus Colleague (DCC) Information

Focus on Employee Reporting

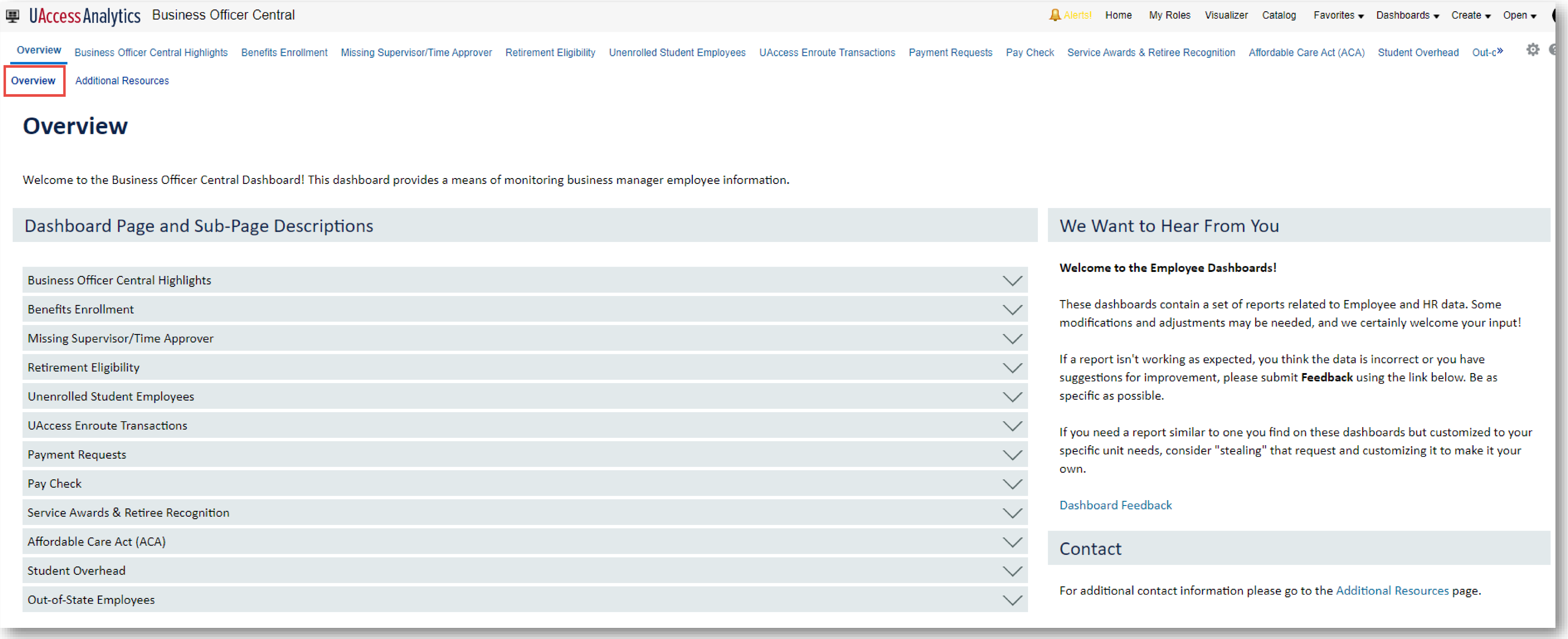
How do I keep track of my unit's employee information?

The **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

Business Officer Central - Overview

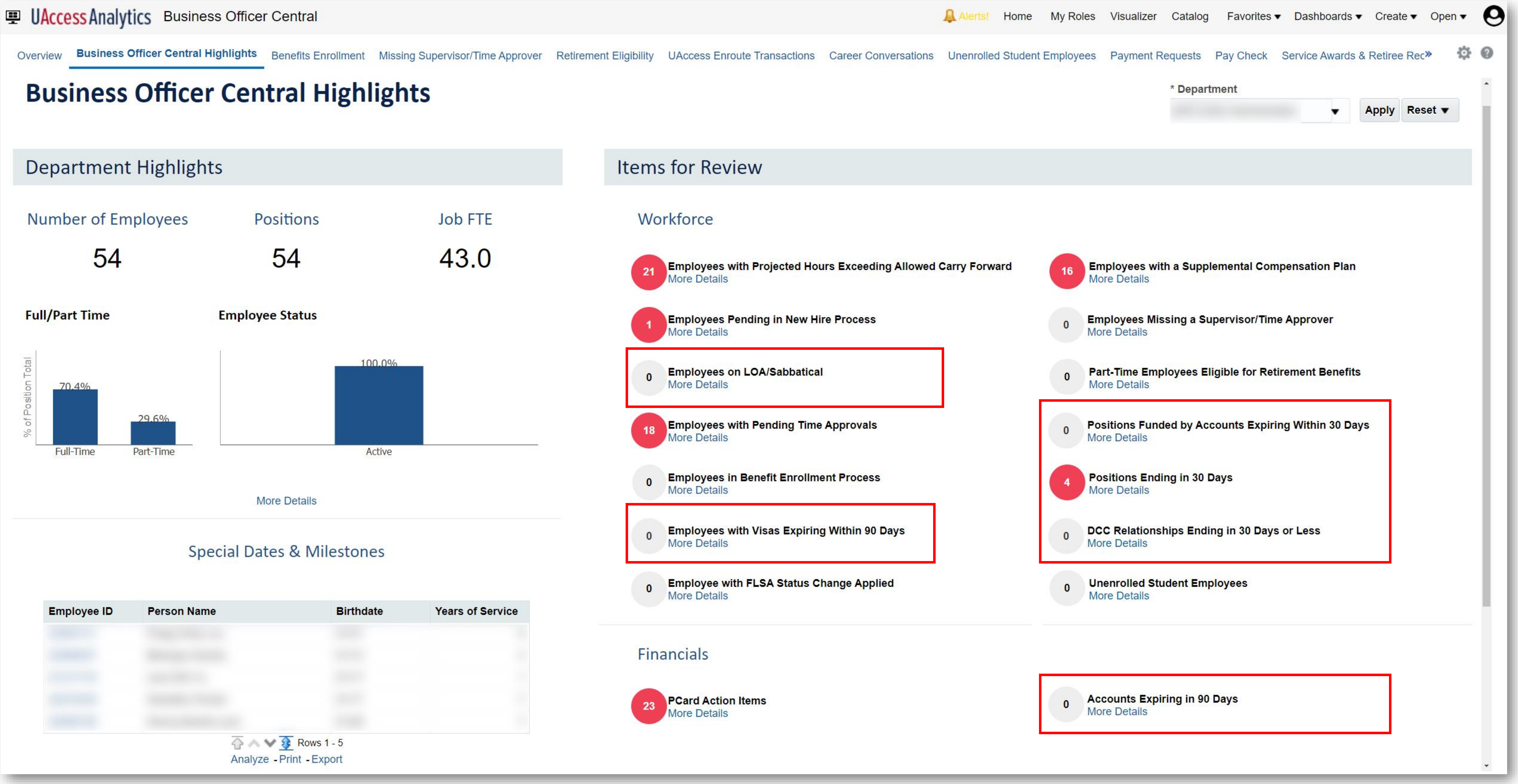


How does this relate to Fiscal Year End?

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


UAccess Analytics
Business Officer Central
Alerts!
Home
My Roles
Visualizer
Catalog
Favorites
Dashboards
Create
Open
Overview
Business Officer Central Highlights
Benefits Enrollment
Missing Supervisor/Time Approver
Retirement Eligibility
UAccess Enroute Transactions
Career Conversations
Unenrolled Student Employees
Payment Requests
Pay Check
Service Awards & Retiree Rec
Business Officer Central Highlights
* Department
Apply
Reset
Department Highlights
Number of Employees
54
Positions
54
Job FTE
43.0
Full/Part Time
% of Position Total
70.4%
29.6%
Full-Time
Part-Time
Employee Status
100.0%
Active
More Details
Special Dates & Milestones
Employee ID
Person Name
Birthdate
Years of Service
Rows 1 - 5
Analyze - Print - Export
Items for Review
Workforce
21 Employees with Projected Hours Exceeding Allowed Carry Forward
More Details
16 Employees with a Supplemental Compensation Plan
More Details
1 Employees Pending in New Hire Process
More Details
0 Employees Missing a Supervisor/Time Approver
More Details
0 Employees on LOA/Sabbatical
More Details
0 Part-Time Employees Eligible for Retirement Benefits
More Details
18 Employees with Pending Time Approvals
More Details
0 Positions Funded by Accounts Expiring Within 30 Days
More Details
0 Employees in Benefit Enrollment Process
More Details
4 Positions Ending in 30 Days
More Details
0 Employees with Visas Expiring Within 90 Days
More Details
0 DCC Relationships Ending in 30 Days or Less
More Details
0 Employee with FLSA Status Change Applied
More Details
0 Unenrolled Student Employees
More Details
Financials
23 PCard Action Items
More Details
0 Accounts Expiring in 90 Days
More Details

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.

UAccess Analytics Rollover

Alerts! Home My Roles Visualizer Catalog Favorites Das

Overview **Home** Funding and Compensation Details Budget and Position Distribution

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

Rollover Reference Report

Individuals/Jobs with Expected End Date

College Id for Job Department	Job Department °	Employee ID	Position Number	Class Indicator	ABOR Code Description	Compensation Rate Code	Visa Expiration Date
--Select Value--		--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	Between -
College Name For Job Department	**Job Department Name**	**Name**	**Supervisor Name**	**Paygroup**	**Contract Length**	**Jobcode Description**	**Expected End Date**
--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	Between -

Apply Reset

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

9Pay12 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
Class Indicator = 'Clinical Assistant'

Student Employees
ABOR Code Description = 'Student Worker'

**Please note that jobs for 9Pay9 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.

UAccess Analytics Rollover

Alerts! Home My Roles Visualizer Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

Overview **Home** Funding and Compensation Details Budget and Position Distribution

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

Rollover Reference Report

Individuals/Jobs with NO Expected End Date

College Id for Job Department	Job Department *	Employee ID	Position Number	Class Indicator	ABOR Code Description	Compensation Rate Code	Visa Expiration Date
--Select Value--		--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	Between -
College Name For Job Department	**Job Department Name**	**Name**	**Supervisor Name**	**Paygroup**	**Contract Length**	**Jobcode Description**	
--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	Apply Reset ▾

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Compensation Rate Code = 'SAL'
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ABOR Code Description = 'Academic Professional; Administrative; Classified Staff; Faculty; Service Professional; Postdoctoral Scholar'
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ABOR Code Description = 'Graduate Assistant/Associate'
Compensation Rate Code = 'SAL'

Clinical Assistants
Class Indicator = 'Clinical Assistant'

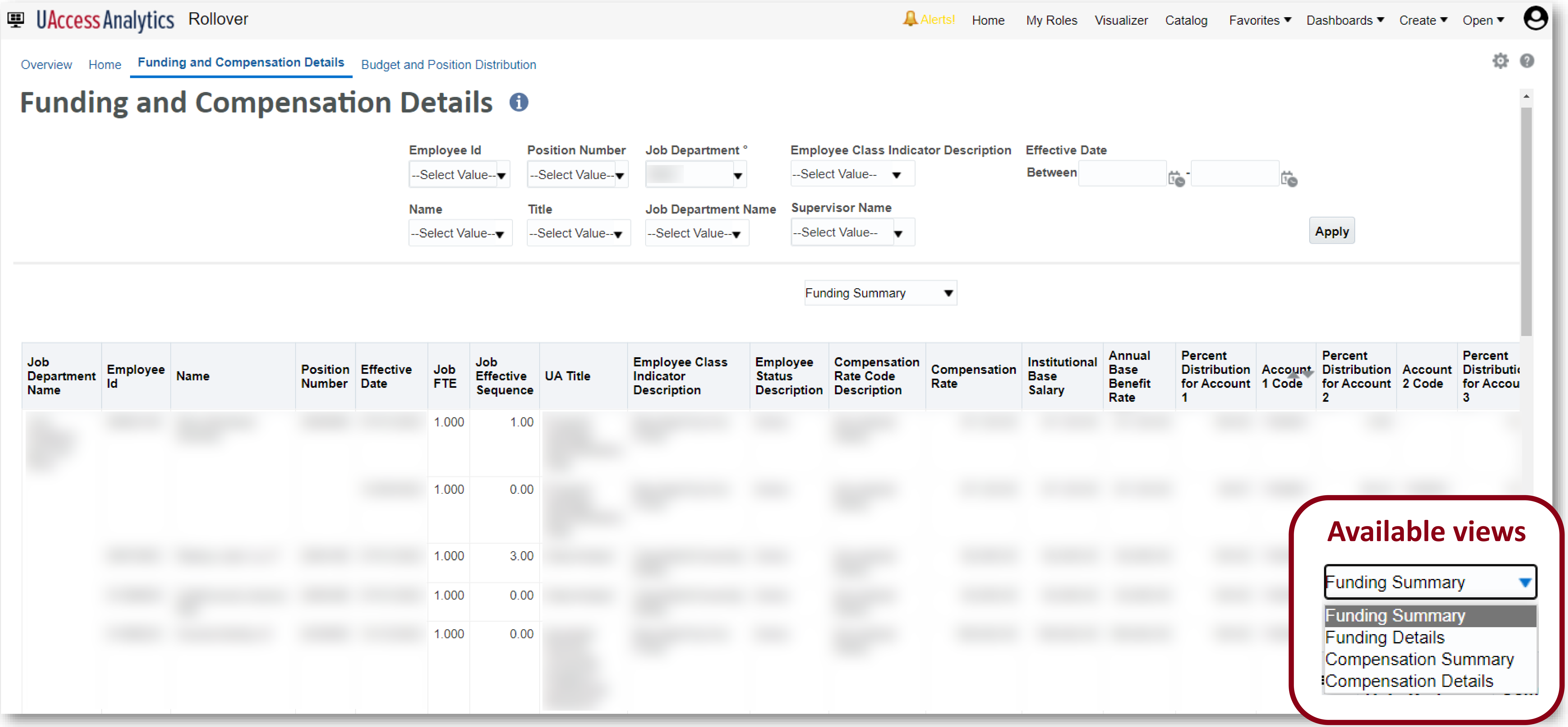
Student Employees
ABOR Code Description = 'Student Worker'

College Id for Job Department	College Name For Job Department	Job Department	Job Department Name	Employee ID	Name	Employee Record Number	Position Number/Type	Supervisor Name	UA Title	ABOR Code Description	Class Indicator	Paygroup	Employee Status	Job/Combined FTE	Compensation Rate	Expected End Date	EED Action Reason	Visa Expiration Date

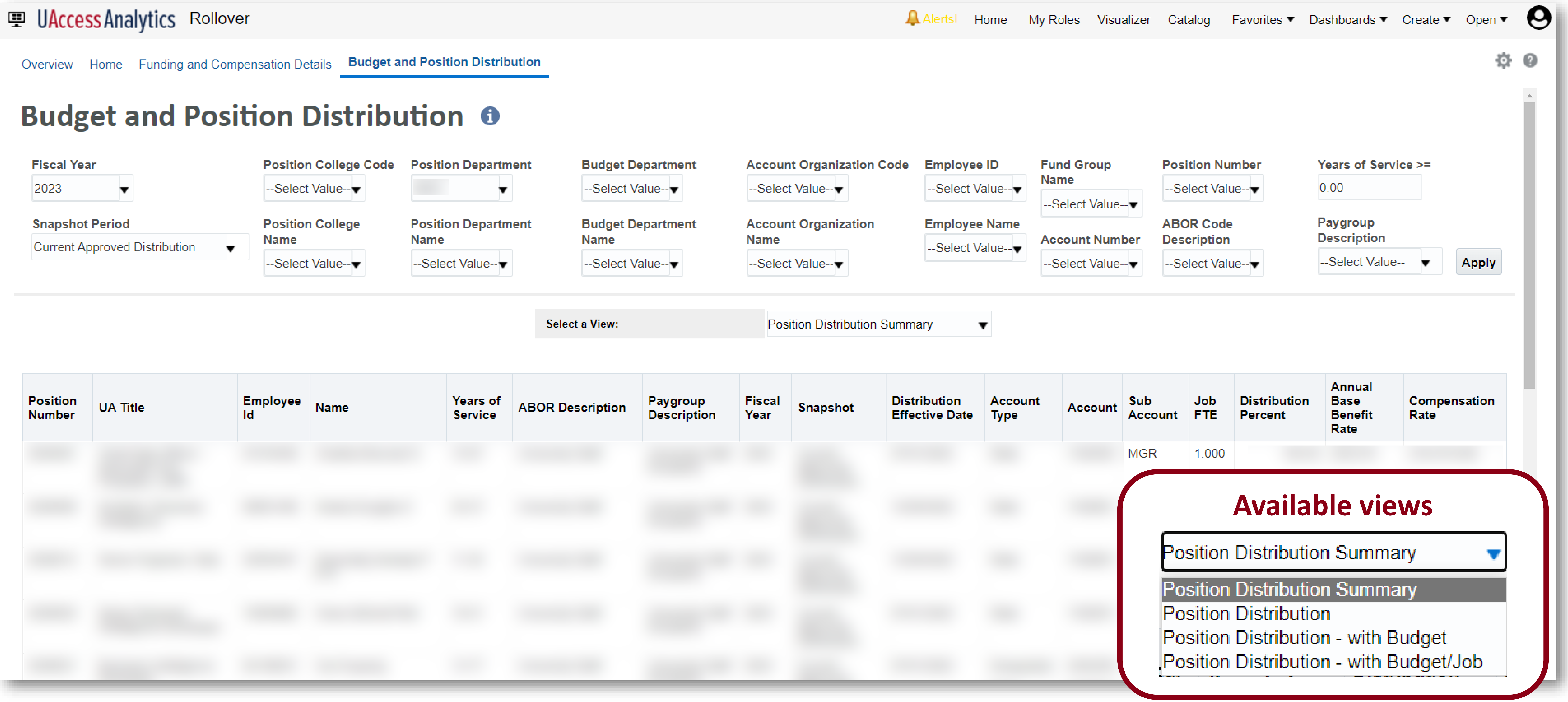
What reports will provide information on FY 2023 and FY 2024 Position Distribution?

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 26: Fiscal Year 2024 Position Distribution account snapshot taken
- May 30: Fiscal Year 2024 Position Distribution is available
  - *Effective Dates 07/01/2023-06/23/2024*
- June 23: MSS Position Distribution Changes for Fiscal Year 2023
  - *Effective Dates 06/12/22-06/25/22*
- July 07: MSS Position Distribution Changes effective 07/01
  - *Effective Date 06/27/22-07/10/22*

How do I identify outstanding employee FY/AY 2023 Notice of Appointments?

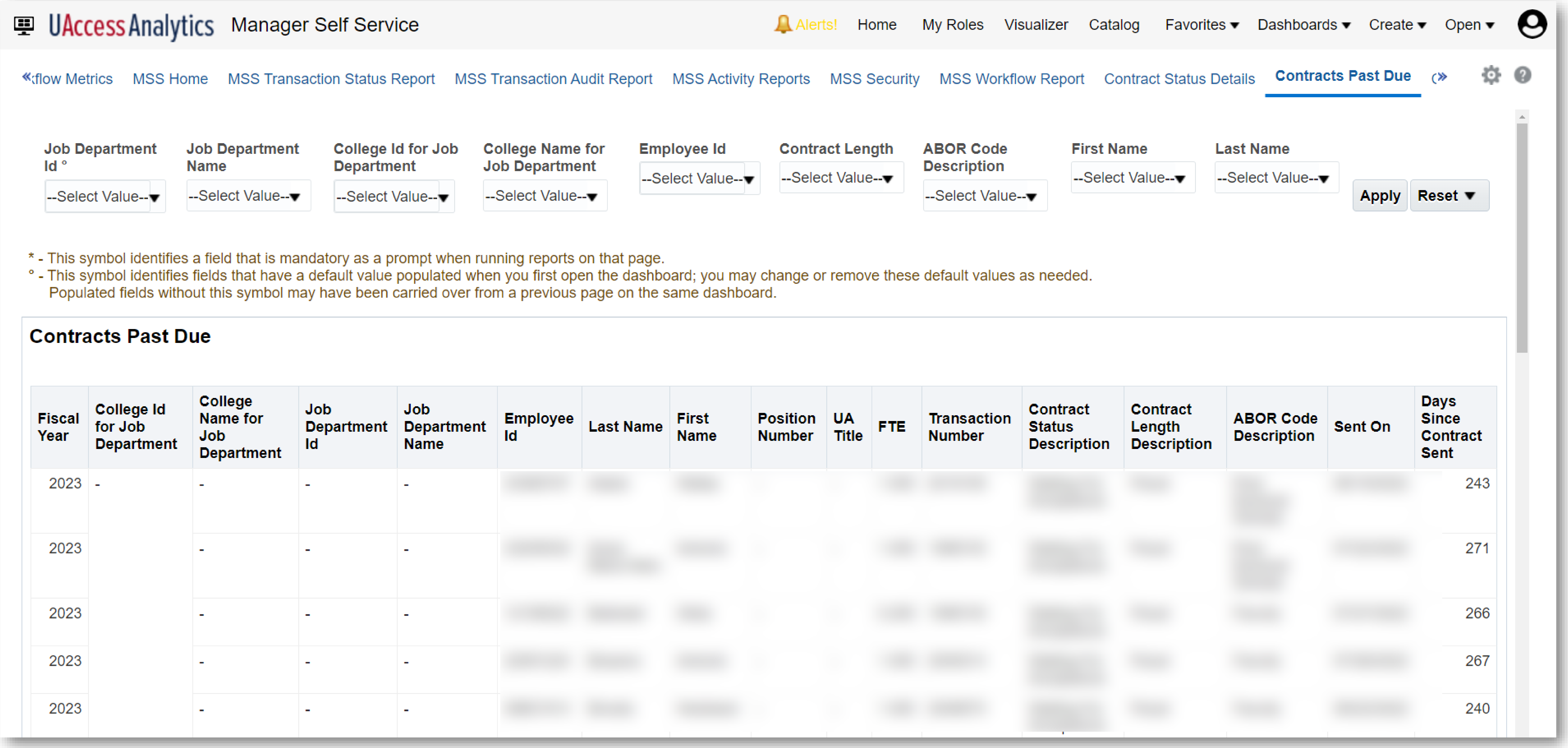
The **Contracts Past Due** and **Contracts Not Sent to Employees** reports provide details on outstanding employee NOAs.

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

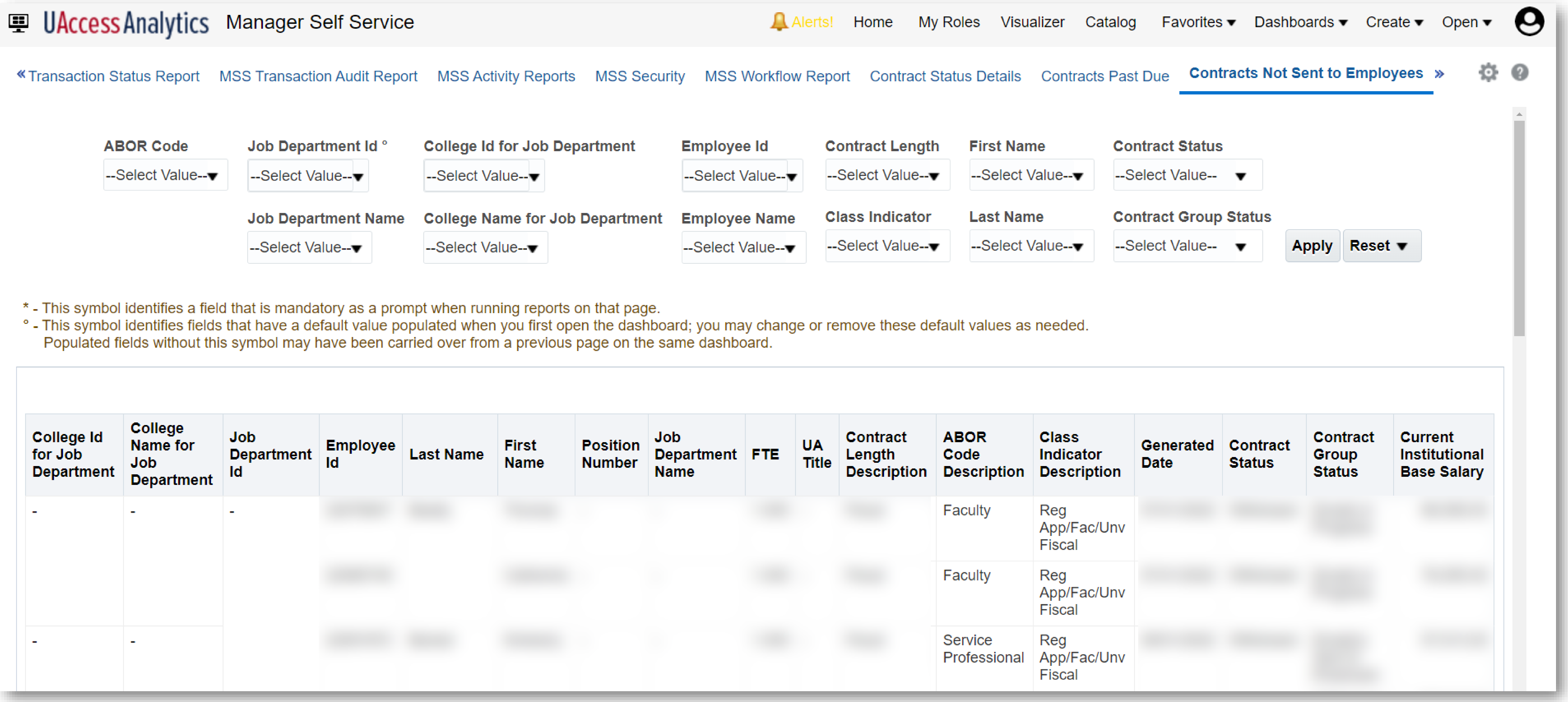
- **Deadline June 30:** College Approvers remove, deny or withdraw contracts not accepted for FY 2023

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 2024.



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 once it is sent to the employee for acceptance.



This report lists employees who have not received a contract in Employee Self Service for the current FY. These contracts have not been generated by the College or are awaiting action by the College or HR Department Approvers.

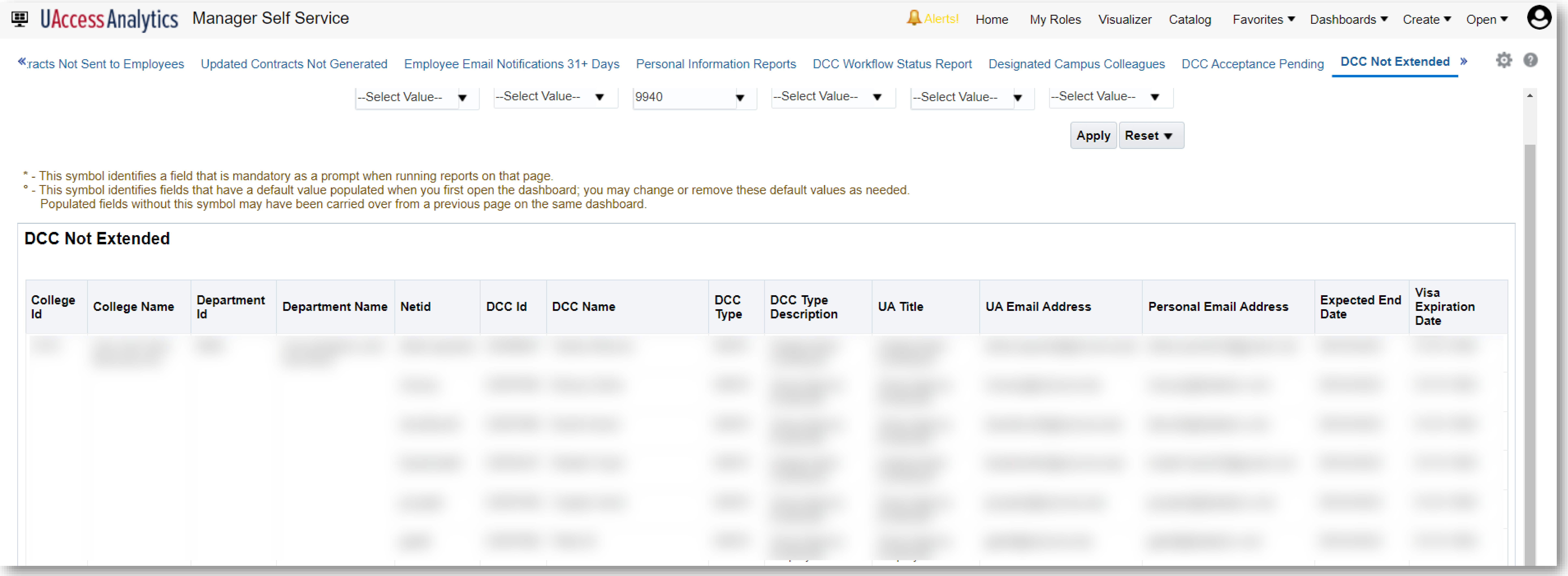
Let's not forget our DCCs

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



This report lists 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

Questions?

THE UNIVERSITY OF ARIZONA
Financials Modernization

The Future of Financials

This multi-phase, multi-year system implementation will provide increased financial clarity, a more standardized Chart of Accounts, and more streamlined business processes for budgeting and financial management at the University of Arizona. The anticipated launch date is July 1, 2024. Visit finmod.arizona.edu for more information or email financialsmodernization@email.arizona.edu.

Coming soon

- Campus facing presentation coming May 10th @ 2PM
- Opportunity for Q&A
- Session will be recorded and shared

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)
- **UAccess Analytics Office Hours**
  (visit with our staff to have your individual questions answered)
- **UAccess Community**
  (a community of users and resources)
- **Data Literacy**
  (ongoing data literacy presentations and trainings)

Visit our website for more information or to sign-up: https://uair.arizona.edu/

University Analytics & Institutional Research

THANK YOU

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