

INITIATIVES USER-GUIDE



Initiatives Web System

Please enter your network username and password.

Username:

Password:

Login



Type the following address into your internet browser:

<https://webapps.uts.sc.edu/budgetinitiatives/default.asp>

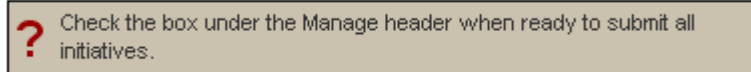
Please enter your network username and password to access your account.

USERNAME:

PASSWORD:

New Users: Contact Kara Law for access (lawkh@mailbox.sc.edu, 803-777-8381)

NOTE: *Helpful tips are provided in the tan box to assist you.*



After you have successfully logged in, the Operating Unit information is displayed. To begin creating initiatives, click the [Create/View Initiatives](#) link.



BUDGET OFFICE

South Carolina

South Carolina's Flagship University

LOGOUT


Operating Unit Listing

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Check the box under the Manage header when ready to submit all initiatives.

OU	Department	Initiatives	Manage	Reviewed
CL014	University Technology Services	Create / View Initiatives	<input type="checkbox"/>	<input type="checkbox"/>

Click the [Create New Initiative](#) button. A series of required questions will be provided in the following tabs: **Justify, Resources, Full-time, Part-time, Operating, One-time, Status**

To print a single tab, click the [Print](#) -  link or icon at the top of the appropriate page.

The first tab is the **Justify** tab. It contains the requested information section, summary section, and the request justification section.

Provide requested information	
Vice President's Initiative Priority Number:	<input type="text" value="1"/>
Unit's Initiative Priority Number:	<input type="text" value="1"/>
Initiative Title:	<input type="text"/>
Department Name:	<input type="text"/>
Fiscal Year:	<input type="text"/>

UNIT'S INITIATIVE PRIORITY NUMBER: Enter the priority number that this initiative represents for your unit with the number one (1) representing the highest priority ranking.

INITIATIVE TITLE: Enter the title of this initiative.

DEPARTMENT NAME: Enter the title(s) of the individual department(s) or major organizational unit for which this initiative provides resources.

FISCAL YEAR: The fiscal year is defaulted to the upcoming fiscal year. Confirm the fiscal year in which the initiative is to be implemented. An explanation should be provided if implementation is beyond the upcoming fiscal year.

The **Summary** section is read-only. All shaded fields are read-only and cannot be edited.

Summary		
The FTE and \$ information which follows is created by a calculation which carries these totals forward from subsequent pages.	FTE	\$
Resources		\$0.00
Full-time Personnel	0.00	\$0.00
Part-time Personnel		\$0.00
Recurring Operating Expenditures		\$0.00
One-time Equipment or Start-up Costs		\$0.00
Total Request	0.00	\$0.00
Net Funding Needed		\$0.00

The **Justification** section should clearly address why the initiative must be supported through the use of new funding and how the initiative will impact the unit's ability to maintain or accomplish the specific planning objectives. Please indicate if the implementation of this initiative is contingent on new funding.

Request Justification Provide a concise description/justification for this initiative request. <div></div>
Why must this initiative be supported through the use of new funding? <div></div>
Identify the Unit Goal(s) and Objective(s) supported by this initiative. Describe how this initiative enables the unit to achieve these objectives. <div></div>

Save

Save & Continue

RESOURCE SECTION

Justify

Resources

Full-time

Part-time

Operating



One-time



Resources				
Type	<input type="text" value=""/>			
Dept/Fund	Description	Account	\$	
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	Add New
Dept/Fund	Departmental Revenues: (4XXXX) - Description	Account	\$	Update
	Total Departmental Revenues		<input type="text" value="\$0.00"/>	
Dept/Fund	Transfers: (8XXXX) - Description	Account	\$	Update
	Total Transfers		<input type="text" value="\$0.00"/>	
	Total Resource Request		<input type="text" value="\$0.00"/>	

If you already have any existing resources for this initiative, please enter it in this section. Please select the type resource in the drop down box. Enter the department/fund where the resource resides. Enter the description, account, and the amount that corresponds with the resource. Please do not use general accounts such as 50000, 53000, etc.

Click the **Add New** button.

Resources				
Type	<input type="text" value="Revenues"/>			
Dept/Fund	Description	Account	\$	
101302A0001	UTS MEDIA SERVICES	40200	<input type="text" value="2000"/>	Add New

If any information is entered incorrectly click the pencil  icon to edit the entry or delete by clicking the  trash can.

Dept/Fund	Departmental Revenues: (4XXXX) - Description	Account	\$	Update
101302A0001	UTS MEDIA SERVICES	40200	\$2,000.00	 
	Total Departmental Revenues		<input type="text" value="\$2,000.00"/>	

FULL-TIME SECTION

If full-time positions are a part of the initiative request, please enter the required information in the following section.

Full-time Personnel					
Type					
Dept/Fund	Description	FTE	Account	\$	
					Add New
Dept/Fund	Full-time Classified Positions	FTE	Account	\$	Update
	Total Classified Positions			\$0.00	
Dept/Fund	Full-time Unclassified Administrative Positions	FTE	Account	\$	Update
	Total Unclassified Administrative Positions			\$0.00	
Dept/Fund	Full-time Faculty, Deans, Acad Dept Head Positions	FTE	Account	\$	Update
	Total Faculty, Deans, Acad Dept Head Positions			\$0.00	
Dept/Fund	Full-time Librarians Positions	FTE	Account	\$	Update
	Total Librarians Positions			\$0.00	
	Total Full-time Salary Costs	0.00		\$0.00	

Select the type of position from the drop down list.

DEPT/FUND: Enter the corresponding department/fund number(s). If more than one dept/fund is being affected by this initiative, enter the dept/fund number followed by the applicable titles and codes. The department/fund numbers must be within the same Operating Unit code.

DESCRIPTION: Enter the position title in the appropriate classification section (Classified, Administrative, Faculty, Librarians).

FTE/ \$: Enter the appropriate number of new full-time positions for a particular title and the salary dollars required to support this initiative. Additional FTE slots are not provided in this process. Please follow the process established by the Division of Human Resources for new or additional FTE slots.

Full-time Personnel					
Type					
Dept/Fund	Description	FTE	Account	\$	
101302A0001	SYSTEM TECH	1	51200	60000	Add New

Scroll to the bottom for the Fringe Benefit Calculation Section.

Fringe Benefit Calculation				
	Benefits	Rates	Account	Costs
	SC Retirement / Group Life	19.06%	51900	\$0
	FICA (Social Security Base of \$128,400)	7.65%	51900	\$0
	Health/Dental Insurance based on coverage type <input type="button" value="Update"/>		51900	
	Unemployment Compensation	0.01%	51900	\$0
	Workers Compensation	0.37%	51900	\$0
	Total Full-time Personnel Request			\$0.00

The costs entered for each of the fringes listed is the summary for all positions.

The Health/Dental Insurance costs should be summarized for all positions. Click the **Add New** button.

Health Insurance **Effective 1/1/2020– 12/31/2020**

<u>Coverage Type</u>	<u>All Health Plans</u>
Employee Only	\$406.24/Month
Employee/Spouse	\$801.22/Month
Employee/Child	\$621.60/Month
Full Family	\$1,002.26/Month

Dental Insurance **Effective 1/1/2020– 12/31/2020**
per covered employee (12 mths) \$13.48 per month

Follow the above guidelines for each full-time position. Click the **Update** button to revise the entry to include Health/Dental Insurance for all positions added.

PART-TIME SECTION

Part-time Personnel						
Type						
Dept/Fund	Description	Hourly Rate	Hours	Account	\$	
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Add New

Select the type of position from the drop down list. Provide the department/fund, description, hourly rate, hours, account, and salary of the new part-time position.

DEPT/FUND: Enter the corresponding department/fund number(s). If more than one dept/fund is being affected by this initiative, enter the dept/fund number followed by the applicable titles and codes. The department/fund numbers must be within the same Operating Unit code.

DESCRIPTION: Enter the position title in the appropriate classification section, i.e., Teaching Faculty (See ACAF 1.06 for approved titles), Graduate Assistants (See ACAF 4.00 for titles), General Wages, Undergraduate Student Assistants, or Undergraduate Federal Work Study Students.

HOURLY RATE: Enter an hourly rate for general and student positions requested in this initiative that is at least equal to the January rate for a particular title. Enter the requested academic year (August – May) compensation amount for graduate assistantships and teaching positions requested in this initiative.

HOURS: Enter the number of hours that the general, student and federal work study position is expected to work during the academic year. Enter the number 1 for graduate assistantships and teaching & research positions.

ACCOUNT: Enter the account that corresponds with the position title.

\$ TOTAL SALARY: Enter the total dollar amount required to support this initiative.

Fringe Benefit Calculation	
Consult the fringe benefit reference guide and enter the appropriate information below.	
<input style="width: 90%;" type="text"/> <input style="margin-left: 10px;" type="button" value="Update"/>	<input style="width: 90%;" type="text" value="0"/>
<div style="text-align: right; border: 1px solid black; width: 100px; float: right; margin-top: -20px;">\$0</div>	

Click the **Add New** button

Follow the above guideline for each part-time position. Click the **Update** button to revise the entry to include fringe for all positions added.

OPERATING SECTION

Recurring Operating Expenditures				
Dept/Fund	Description	Account	\$	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	Add New
Dept/Fund	Operating Expenditure Description	Account	\$	Update
	Total Operating Expenditure Request		\$0.00	

If operating costs will be associated with the new initiative, please enter all recurring operating expenses in this section.

DEPT/FUND: Enter the corresponding dept/fund number. If more than one dept/fund is being affected by this initiative, enter the dept/fund number followed by the applicable titles and accounts.

DESCRIPTION: Briefly describe the expenditure, i.e., contractual services for design, microscopes, etc.

ACCOUNT: Enter account related to the operating expenditure description.

\$ AMOUNT: Enter the dollar amount for a particular item related to this initiative.

ONE-TIME SECTION

One-time Equipment or Start-up Costs				
Dept/Fund	Description	Account	\$	
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Add New
Dept/Fund	Equipment or Start-up Cost Description	Account	\$	Update
	Total Equipment Request		\$0.00	

If start-up costs will be associated with the new initiative, please enter all items in this section.

1. **DEPT/FUND:** Enter the corresponding department/fund number(s). If more than one dept/fund is being affected by this initiative, enter the dept/fund number followed by the applicable titles and codes.
2. **DESCRIPTION:** Enter the description of the anticipated one-time cost.
3. **ACCOUNT:** Enter the account related to the description. (Equipment items include all accounts beginning with 56XXX and over \$5,000).
4. **\$:** Enter the dollar amount for a particular item requested in this initiative.

Typically, large equipment purchases will include maintenance costs for one-year or more. However, if maintenance costs are significant or are not part of the purchase price, you may wish to note this in your narrative.

Before submitting, please be sure to check your entry for spelling and grammatical errors due to live reporting. Live reporting means the entry is automatically submitted to the Administration from the system. To submit your initiatives, click the checkbox under the Manage header on the Operating Unit List page.

You will receive a message to confirm your submission.

Message from webpage
×

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Are you sure you want to submit the initiatives for Operating Unit Code CL014?

OK
Cancel