



# Administrative Changes Info Session

Tom Hoffacker – Human Resources
Teresa Palmer – Student Employment
Deanne Toby – Procurement
Wendy Cain – Accounting
Stephanie Jennings - Payroll

Wednesday, Jan. 22 – 1:30 to 3:30 Thursday, Jan. 23 – 9:00 to 11:00

# Administrative Changes

- 30-hour rule for the Healthcare Reform Act Effects on part-time employees
- Temporary employees Work full-time 9 months in 12 month period
- Student employment Maximum work hours per week and applying for work via PeopleAdmin
- 4. P-Card Asset Information Form & Instructions
- 5. Independent Contractors or Employees New form and process
- 6. Discretionary spending guideline changes
- 7. Fringe Benefits



# 30-hour rule for the Healthcare Reform Act – Effects on part-time employees

- a) Who? "Variable hour" faculty & staff. Includes...
  - Part-time regular and temporary faculty & staff
  - Adjuncts
  - Student Workers & Graduate Assistants
- b) Initial Measurement ("Lookback") Period
  - Oct. 16, 2013 to Oct. 15, 2014
- c) Initial Stability Period
  - Jan. 1, 2015 to Dec. 31, 2015
- d) HR is monitoring hours and will coordinate offering health benefits. Excludes dental, vision, & other benefits that full-time faculty & staff receive.
- e) Adjuncts Credit hours to hours worked ratio is 1:3 for fall & spring. Other ratios for shorter terms.



# Temporary employees – Work full-time months in 12 month period

- a) KERS has revised their 9 month rule. Can not work fulltime (>20 hours/week) for >9 months in a 12 month period.
- Can not have just 1 month off; must have 3 consecutive calendar months off
- c) If work  $\leq$  20 hours/week Can work indefinitely
- d) If work > 20 hours/week for >9 months Pay into retirement for EE's entire employment period
- e) Full-time temps are limited to 40 hours/week maximum for their 9 months



# 3. Student employment – Maximum work hours per week and applying for work via PeopleAdmin

- a) Maximum 20 hours per week
- b) PeopleAdmin
  - Student = <u>murraystate.edu</u> ~ Jobs ~ Student Employment
  - Departments = <a href="https://www.murraystatejobs.com/hr/login">https://www.murraystatejobs.com/hr/login</a>
    - UserID = pooluser
    - Password = access

Email to departments will contain the details regarding categorizing of pools and deadlines.



#### 4. P-Card Asset Information Form Process

- Complete the shaded areas on the form.
- b) Submit the following to Accounting, in one packet:
  - \* Original associated Inter Account Bill

(This should show the charge being moved into the correct equipment account 727XXX)

- \* Completed Asset Information Form
- \* Receipt/Invoice
- c) Questions regarding this form & process should be directed to:
  - \* Inventory Services at 809-4435
- d) The Asset Information Form can be found on Knowledge Base under Procurement Forms.



#### 4. P-Card Asset Information Form

#### **ASSET INFORMATION FORM** INV-IC-001.2/REVISED 13/14 Only For Use When Purchasing an Asset on a Purchasing Card ASSET NUMBER 1. COMPLETE SHADED AREAS. 2. SEND ORIGINAL ASSOCIATED INTER ACCOUNT BILL\*, ASSET INFORMATION FORM, AND RECIEPT/INVOICE DEPT MANUFACTURER'S ROOM BLDG MODEL SERIAL NAME NUMBER ASSET TYPE QTY STANDARD DESCRIPTION ACQUISITION ORIGINAL LAST FOUR DIGITS OF CARD VENDOR NAME DATE COST PRINT PURCHARSING CARD HOLDER NAME DEPARTMENT NAME MAIL COMPLETE PACKET TO ACCOUNTING AND FINANCE IN SPARKS HALL QUESTIONS SHOULD BE DIRECTED TO INVENTORY SERVICES AT 809-4435. \* INTER ACCOUNT BILL SHOULD SHOW THE CHARGE BEING MOVED INTO CORRECT EQUIPMENT ACCOUNT 727XXX



#### 5. Independent Contractors or Employees – New form and process

- a) The IRS has guidelines for determining contractor & employee status.
- b) Revised form and routing process
  - If Employee, then route PA
  - If Independent Contractor, then send Special Services Contract with this form to HR
  - If unsure, send this form to HR for further instructions
- Access it on the Support Site at <u>Knowledgebase</u>
   <u>Home</u> > <u>Forms</u> > <u>HumanResources</u> > <u>Employment</u> >
   <u>Other Employment Forms</u> (<u>form</u>)



#### 5. Independent Contractors or Employees -New form and process



Independent Contractor or Employee Status (ICE Status)						
The information provided below will assist in determining the independent contractor or employee status in accordance with IR3 Publication 15-A for individually) performing services for Murray State University. These questions are intended as a guide in making this classification. Further evaluation may be necessary based on specific individual circumstance.						
*This request is for a single person or multiple persons. If this applies to multiple persons, please complete the second page found at this link.						
Name of proposed Employee or Contractor: M#/VIN (if any)						
Dates work requested:						
Sinci description of service to be performed (prease mink to the mices).						
Section 1: Relationship with the University - Answer all 4 questions. If request is for multiple people, please complete page 2.						
Yes No Unsure						
Does the individual currently work for Murray State University as an employee?  If "Yes", position title:						
2.   Has the Individual worked as an employee of the university during the current calendar year of this contract?						
Has an offer of employment been extended to the individual?     Is the individual a student of the university or a non-resident alien with a student or research scholar immigration status?						
If the answer to all of these questions is "No," PROCEED to Section 2.  If the answer to any of these questions is "Yes," STOP. Check the Employee box in Section 3 below.						
if the answer to any or these questions is "res," SLOP. Check the Employee box in Section 3 below.  If the answer to any of these is "Unsure", complete applicable portion in section 2 and send to Human Resources.						
Section 2: Classification Guidelines - Complete only ONE of the following sections (A. B. or Cl. based on services to be performed.						
A. Teacher/Lecturer/Instructor						
Is the individual an invited guest lecturer (lectures in a seminar, colloquium, class, etc.?)     Has the individual been at the university in this capacity fewer than four times in the past 12 months?						
If the answers to questions 1 and 2 are "Yes," STOP. Check the Independent Contractor box in Section 3.						
If the answer to either question is 9No,* PROCEED.  3.						
If the answer to question 3 is "Yes." STOP, Check the Employee box in section 3.						
If the answer to question 3 is 9No," PROCEED.  4.  Has the individual provided the same or similar services as an ongoing business or other unrelated entities in the last 12 months?						
<ol> <li>Does the university have any control over course materials that are used by the Individual?         If the answer to question 4 is "Yes," AND the answer to question 5 is "No;" STDD. Check the Independent Contractor box in Section 3; otherwise, check the Employee box.     </li> </ol>						
B. Researcher (Responses require a combination of "Yes" and "No.")						
Will the Individual perform research under the supervision of a Murray State University employee?      Will the Individual serve in an advisory or consulting capacity for a Murray State University employee?      If the answer to question 1 is "Yes," STOP. Check the Employee box in Section 3.						
If the answer to question 2 is "Yes," check the Independent Contractor box.  C. Individuals Not Covered Under Sections A or B						
Has the individual provided the same or similar services to other unrelated entities or to the general public as a trade or business during the last 12 months?						
2. Will the department provide the individual with specific instructions regarding performance of the required work rather than rely on the						
individual's expertise?  3. Can the university set the number of hours and/or days of the week that the individual is required to work, as opposed to allowing the						
Individual to set his/her own work schedule?						
If the answer to question 1 is "Yes," AND the answer to questions 2 and 3 is "No," STOP. Check the independent Contractor box in Section 3.  If the answer to question 2 OR 3 is "Yes," check the Employee box in Section 3, otherwise, check the Independent Contractor box.						
Section 3: Classification (Select only one.)						
Employee Classification Independent Contractor Classification						
All completed forms should be printed and sent to Human Resources 412 Sparks Hall or by fax to (270) 809-3464						
Completed by: (Please Print) Date:						
Contact Number:						
Office Use Only: HR(initial): Procurement(initial): Comments:						
Copies to: Requesting and Home department, Procurement						
Independent Contractor v Employee Status- as of 9,16,13 p1 Last Revised: 9/16/2013						



Independent Contractor v Employee Status- as of 9.16.13 p2

#### Independent Contractor or Employee Status (ICE Status) Multiple Person Request

\*Once completed, print and submit along with the first page to Human Resources 412 Sparks Hall or by fax to (270) 809-3464

Name of proposed Employee or Contractor:	M#/VIN (if any)				
Dates work requested:					
· -					
Section 1: Relationship with the University - Answer all 4 questions.					
Yes No Unsure					
Does the Individual currently work for Murray State University	rsity as an employee?				
If "Yes", position title:	· · · · ·				
Has the Individual worked as an employee of the university     Has an offer of employment been extended to the Individual					
<ol> <li>Has an offer of employment been extended to the Individu</li> </ol>					
4.   Is the individual a non-resident alien with a student or resident.	earch scholar immigration status?				
l					
If the answer to any of these is "Unsure", complete applicable portion in section 2	2, page 1 and send to Human Resources.				
Name of proposed Employee or Contractor:					
Dates work requested:					
Section 1: Relationship with the University - Answer all 4 questions.					
Yes No Unsure					
1.   Does the Individual currently work for Murray State University	rsity as an employee?				
If "Yes", position title:					
Has the Individual worked as an employee of the university     Has an offer of employment been extended to the Individual     In the Individual a non-resident allen with a student or rese	ty during the current calendar year or this contract?				
Has an offer of employment been extended to the individu	III f				
4.   Is the Individual a non-resident alien with a student or resident.	earch scholar immigration status?				
If the answer to any of these is "Unsure", complete applicable portion in section 2	2 page 1 and rend to Human Resources				
If the answer to any or these is of some , complete applicable portion in section 2	z, page 1 and send to Human Nesources.				
Name of proposed Employee or Contractor:	M#/VIN (if any)				
Dates work requested:					
Section 1: Relationship with the University - Answer all 4 questions.					
Yes No Unsure					
Does the Individual currently work for Murray State University	rsity as an employee?				
If "Yes", position title:  2.   Has the individual worked as an employee of the universit	by during the gurrent extender year of this contract?				
Has an offer of employment been extended to the individu	ry during the current calendar year or this contract:				
Has the Individual worked as an employee of the universit     Has an offer of employment been extended to be Individual     Is the Individual a non-resident allen with a student or res	earch scholar immigration status?				
	caron oction anning allow outlast.				
If the answer to any of these is "Unsure", complete applicable portion in section 2	2. page 1 and send to Human Resources.				
4) Name of proposed Employee or Contractor:	M#/VIN (if any)				
Dates work requested:					
Dates work requested.					
Section 4: Delationship with the University Answer all 4 questions					
Section 1: Relationship with the University - Answer all 4 questions. Yes No Unsure					
Does the Individual currently work for Murray State University	rstly as an employee?				
If "Yes", position title:	any as an employee:				
2.   Has the individual worked as an employee of the universit	ty during the current calendar year of this contract?				
2.	ial?				
4.	earch scholar immigration status?				
	-				
If the answer to any of these is "Unsure", complete applicable portion in section 2	2, page 1 and send to Human Resources.				
Additional Pages may be completed if needed.					
Completed by: (Please Print)	Date:				
Contact Number:					
Contact Number.					
Office the of	N-1				
Office Use Only: HR(Initial): Procurement(initial): Comments:					
rityrinar)					
Copies to: Requesting and home dep	partments UP/Procurement				
Superior to responsing and ments departments, interrocurences.					



Last Revised: 9/16/2013

### Discretionary spending guideline changes

- New category added for source of funds University Donor accounts
- b) Under item 4 b. Dues Professional licenses are allowable with VP approval and if it is a job requirement
- Under item 4 b. Dues Professional organizations are allowable with VP approval
- d) Under item 14 d. Meals Students events added were RD and RA recognition Events
- e) Under 14 Meals the gratuities amount is increased to 20%



## Discretionary spending guideline changes

#### New category added 15 Clothing/Shoes –

- Purchase of employee clothing is unallowable from University and University
   Vending funds except for the following:
  - Police uniforms
  - Facilities maintenance uniforms
  - Chef coats and dining uniforms
  - Shirts provided for campus events such as summer orientations, great beginnings campus event should be noted on invoice
  - Student recruitment events recruitment event should be noted on invoice
  - Departmental purpose where the same/like apparel is desired is allowable from University Vending funds with VP approval



## Discretionary spending guideline changes

g) Access it on the Support Site at http://campus.murraystate.edu/administ/accounting/lumi nis/Discretionary\_Expenditure%20Policy-01\_19\_14\_(1).pdf

Murray State University							Revised as of 01/19/14
Discretionary Expenditure Regulations							Accounting and Finance
	Changes						
		Source	e of Fu	nds	i		
		(note 1)	(note 2)	(note 3)	(note 4)	(note 5)	
		University		University		Minimum	
Category	Expenditure Type	Non	Vending	Donor	Foundation	Approval	Comments
		Discretionary				Levels	
		(note 7)	(note 7)		(note 7)		
1. Awards /	a. Employee Award/ Incentive Programs	Yes	Yes	Yes	Yes	Pres	Must be part of a documented employee award / incentive
Trophies/							program approved by the President.
Plaques	b. Student Awards	Yes	Yes	Yes	Yes	Dean/ Dir	Must be part of a documented student award program
							approved by the Dean or non-academic VP.
	c. Non-employee Award/ Recognition	Yes	Yes	Yes	Yes	Pres	Must be part of a documented award/ recognition program
2. Decorations /							approved by the President
	a. Greeting Cards	No	Yes	Yes		Dean/ Dir	
Cards/Events	b. General Campus	Yes	Yes	Yes		Pres	
(holiday / seasonal / special occasion /	c. Open Lobby / Dept Lobby Decorations (general only)	Yes No	Yes	Yes	Yes No	Dean/Dir	
general	d. Open Lobby / Dept Lobby Decorations (holiday, special occasion, seasonal)	No	No	No	No		
general	e. Individual Office Decorations	No	No	No	No		
3. Contributions / Donations	e. Individual Office Decorations	No	No	Yes	Yes	VP	
4. Dues	a. Institutional	Yes	Yes	Yes		VP	Membership must be in the name of Murray State University and not a department or individual
	b. Individual-		l				
	- Civic	No	No	No	No		
	- MSU Faculty Club	No	No	Yes		VP	
	- Professional Licenses	Yes	Yes	Yes	Yes	VP	Only allowed when license is job requirement.



#### 7. Fringe Benefits

a) Access it on the Support Site at <a href="http://campus.murraystate.edu/administ/accounting/luminis/fringe-benefit-form.pdf">http://campus.murraystate.edu/administ/accounting/luminis/fringe-benefit-form.pdf</a>

#### Taxable Payments or Reimbursements to Employees

All Departments must complete this form, when a taxable fringe benefit is received by an employee. This form must be completed within 15 days of receiving the benefit. Please send the form to the Payroll Office 2nd Floor of Sparks Hall

Name of Employee receiving the benefit :		M #					
Employee's Primary Department:							
I acknowledge that some or all of the payment/reimbursement below may be taxable and included in my income.							
Employee Signature	 Date						



#### 7. Fringe Benefits

#### b) Examples of Taxable Fringe Benefits

- Athletic Season Tickets
- 2. Awards, Prizes or Gifts (Non-Cash) >\$100
- 3. Clothing
- 4. Housing Allowances
- Meal Plans
- 6. Wellness Center Memberships
- 7. Theater Tickets
- 8. Taxable Travel
- 9. Moving Expenses
- 10. Tuition Waivers







## Administrative Changes Info Session

#### Questions?

Tom Hoffacker – Human Resources
Teresa Palmer – Student Employment
Deanne Toby – Procurement
Wendy Cain – Accounting
Stephanie Jennings - Payroll