



# Account Managers Group

**Please choose a seat next to  
someone you don't know.  
Introduce yourself!**

**[mwsu.edu](http://mwsu.edu)**

# Account Managers Group

Welcome

Dr. Marilyn Fowle'

MIDWESTERN  
STATE UNIVERSITY

# Account Managers Group

## Office of the Associate Vice President for Academic Affairs

Dr. Deborah R. Garrison  
Dean of the Billie Doris McAda  
Graduate School

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# Graduate School

**Dean, Deborah R. Garrison – Hardin 113**

**Assistant, Lucy Davis – Hardin 114**

**Coordinator, Amanda Walton – Hardin South 146**

**Secretary, Tyeshia Stewart - Hardin South 146**

# Naming of the Graduate School

- Dr. Billie Doris McAda
- 1957 Alumna from MSU
- \$2 Million gift
- Supporting consultation with Noel-Levitz for enrollment management and Recruitment
- Publicity for Graduate School – materials, brochures, advertising, mailing, etc.

# Graduate School Enrollment

- Fall 2014 graduate degree-seeking enrollment is the highest since the founding of the Graduate School in 1952.
- 672 degree-seeking students (11% increase)
- 730 post-baccalaureate + degree seeking (730 7.8% increase)
- 4200 credit hours produced (18% increase)

# Graduate School Initiatives

- New website: <http://www.mwsu.edu/academics/graduateschool/index>
- Graduate Programs' websites will all be enhanced by the end of the academic year
- Centralization of applications, graduate reviews, and communication with students
- Channel graduate inquiries to Amanda Walton at [amanda.walton@mwsu.edu](mailto:amanda.walton@mwsu.edu) for tracking

# Graduate Assistantships

- Three types of assistantships:
  - Graduate Teaching Assistants
  - Graduate Research Assistants
  - Graduate Instructional Assistants
- MSU Policy 3.131 details these requirements and responsibilities

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# Graduate Teaching Assistants

- Graduate Teaching Assistants must have 18 graduate hours completed and are approved to teach up to two sections.
  - Each section represents 25% of a full-time equivalent (FTE)
  - Two sections = 50%
  - This makes them benefit-eligible
  - MSU is required to offer benefits for employees holding a position of 50% or greater.

# Graduate Research/Instructional Assistants

- Graduate Research Assistants use program code “14”
- Graduate Teaching Assistants use program code “12”
- Full assistantship
  - 19 hours per week
  - \$8,000 stipend (\$4,000 each semester)
  - 47.5% FTE
- Half assistantship
  - 10 hours per week
  - \$4,000 stipend (\$2,000 each semester)
  - 25% FTE

# Electronic Personnel Action Forms

- Required for new or returning Graduate Assistants
- Use Percent of Time as indicated on previous slides
- Include Lucy Davis and Deborah Garrison in the approval process
- Note: does not apply to Graduate Teaching Assistants. They will continue to be submitted on an employment recommendation with no change at this time.



Thank you ~ Questions?



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## Office of Sponsored Programs and Research

Deborah R. Garrison, Director OSPR

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# McAllister & Quinn

- McAllister & Quinn is a Washington, DC consulting firm that provides a comprehensive range of services to a diverse group of clients with issues before the federal government. John McAllister and Andy Quinn founded the firm in 2004.
- MSU is in a two year agreement for support in writing four grants per year.

# Benefits of Consultation

- Over 125 grant writers, one of whom is assigned to each of our grants
- Ongoing consultation
- Careful matching of federal and foundation grant opportunities with MSU strengths
- Two grants submitted: National Science Foundation and National Institutes of Health
- Two grants under development: Health Resources Services Administration and National Endowment for the Humanities



# Grant Life Cycle

**Shane Comer, Coordinator OSPR**

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# Funding Sources

- Extramural Funding: External Organizations
  - Federal Funding: National Science Foundation, National Institutes of Health, etc.
  - State Funding: The Higher Education Coordinating Board
  - Foundations:
    - National - such as the Gates Foundation
    - Local - such as the Priddy Foundation
- Intramural Funding
  - MSU University-Wide Grants
  - MSU College Grants

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# External Proposals

- Communicate Early with OSPR
  - Requirements will depend upon the nature of the funding source
  - Submit concept paper to OSPR with MSU Intent to Apply form
    - Plan for submission – electronic or paper
    - Director of OSPR may need to authorize faculty to submit electronic materials
  - Engage with OSPR and Grants Budget Officer, Hayley Laughlin, to prepare budget
  - Two weeks prior to due date, submit final proposal with Grant Cover Sheet

# Managing Grant Awards: Internal and External

- Assure that expenses match proposal budget
- If the grant awardee needs to change the types of expenditures, these must be approved through OSPR ahead of time: for example exchanging travel funds for equipment changes the nature of funding.
- Assure that grant expenses are correctly matched with account numbers as specified by OSPR and the budget office
- All grants expenses must comply with MSU policies

# Amplifund

- MSU has acquired grant management software through Streamlink software
- Purpose: to better manage grant awards, both Internal and External
  - Amplifund will be implemented with the 2014-15 Internal MSU grant awards
  - Training sessions will be offered for those using the program
  - OSPR and the MSU Budget Office are working together with this implementation

# Sharing the Research

- Both internal and external awards often include funds for dissemination
  - Research is of limited value if it is not communicated with colleagues
  - Dissemination typically must be addressed in proposals, as those agencies funding the research want to make sure findings are published and or presented.



Thank you for your time...

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**EPAF Update**

**Kathy Rice**

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# New EPAFs

Effective November 17<sup>th</sup>

- Hire Benefit Eligible Employees
- Terminate Benefit Eligible Job
- Title Change
- Benefit Eligible Stipend
- Reactivate Benefit Eligible Stipend
- Hire Graduate Assistant
- Rehire or Change Graduate Assistant
- Hire Temporary Monthly Employee
- Rehire or Change Temporary Monthly Employee
- Communication Stipend
- Hire Part Time Hourly Temp
- Rehire or Change Part Time Hourly Temp
- Hire Full Time Hourly Temp
- Rehire or Change Full Time Hourly Temp
- Non Benefit Eligible Stipend
- Reactivate Non Benefit Eligible Stipend
- Terminate Non Benefit Eligible Job





## **Training Session For GA EPAFs**

January 7<sup>th</sup> – 1:30

***Change To Annual Salary Field and Added Pay Factors***

### **Changes To EPAFs**

FOAPAL (account number) added for viewing only

### **EPAF Reminders**

All Lump Sum/Stipend payments need the following in the comments:

- Reason for payment
- Date duty was performed

***This will replace the justification form!***

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**Budget Pools:  
Non-Student Wages vs.  
Faculty & Staff Salaries**

**Debbie Vaughn**



# Budget Pools

**Faculty Salaries:**  
**(6000)**

Base salary of benefit eligible faculty  
Adjuncts

**Staff Salaries:**  
**(6100)**

Base salary of benefit eligible employees  
Longevity

**Non-Student Wages:**  
**(6400)**

Any payments other than those listed  
listed (Event Staff, designing online  
courses, stipends, etc.)

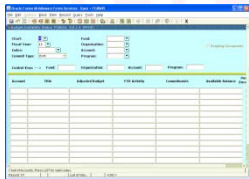
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## Software Tips of the Month



### Outlook

- How to keep meeting requests in your inbox after responding
- How to create a note



### Banner

- Customized links in Banner

# Outlook – Save Appointment Notification

The screenshot shows the Outlook Options dialog box with the 'Mail' tab selected. The 'File' menu and 'Options' button are circled in red. A red arrow points to the 'Use Auto-Complete List to suggest names when typing in the To, Cc, and Bcc lines' checkbox.

**File** Home Send / Receive Folder View Adobe PDF

Save As Save as Adobe PDF Save Attachments

Info

Open Print Help

Options Exit

### Account Information

Outlook Options

- General
- Mail**
- Calendar
- Contacts
- Tasks
- Notes and Journal
- Search
- Mobile
- Language
- Advanced
- Customize Ribbon
- Quick Access Toolbar
- Add-Ins
- Trust Center

When replying to a message: Include original message text

When forwarding a message: Include original message text

Preface each line in a plain-text message with: >

#### Save messages

- Automatically save items that have not been sent after this many minutes: 3
- Save to this folder: Drafts
- When replying to a message that is not in the Inbox, save the reply in the same folder
- Save forwarded messages
- Save copies of messages in the Sent Items folder
- Use Unicode format

#### Send messages

- Default Importance level: Normal
- Default Sensitivity level: Normal
- Mark messages as expired after this many days: 0
- Always use the default account when composing new messages
- Commas can be used to separate multiple message recipients
- Automatic name checking
- Delete meeting requests and notifications from Inbox after responding
- CTRL + ENTER sends a message
- Use Auto-Complete List to suggest names when typing in the To, Cc, and Bcc lines

Empty Auto-Complete List

OK Cancel

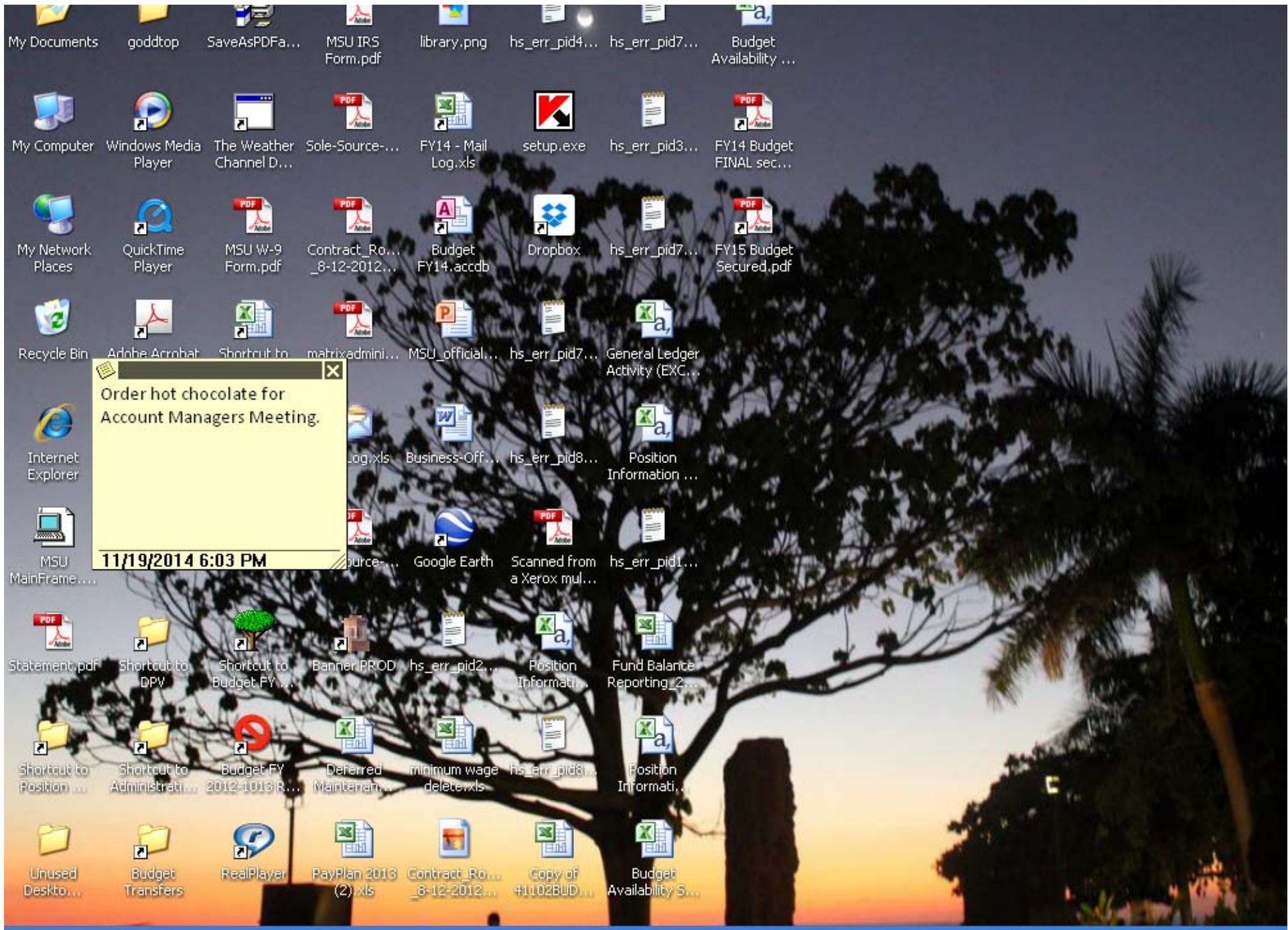
# Outlook – Creating a “Sticky” note

The image illustrates the steps to create a sticky note in Microsoft Outlook. Red arrows indicate the following actions:

- Clicking on **New Items** in the ribbon.
- Clicking on **More Items** in the dropdown menu.
- Clicking on **Note** in the sub-menu.

The resulting sticky note window displays the text: **Order hot chocolate for Account Managers Meeting.** and the timestamp **11/19/2014 5:56 PM**.

The 'Mail' task pane is also shown, with a red arrow pointing to the **Tasks** section, which contains a list of tasks including 'Bring a dish' and 'Order hot chocolate for Account Managers Meeting.'



Order hot chocolate for  
Account Managers Meeting.

11/19/2014 6:03 PM

- My Documents
- godstop
- SaveAsPDFa...
- MSU IRS Form.pdf
- library.png
- hs\_err\_pid4...
- hs\_err\_pid7...
- Budget Availability ...
- My Computer
- Windows Media Player
- The Weather Channel D...
- Sole-Source-...
- FY14 - Mail Log.xls
- setup.exe
- hs\_err\_pid3...
- FY14 Budget FINAL sec...
- My Network Places
- QuickTime Player
- MSU W-9 Form.pdf
- Contract\_Ro...\_8-12-2012...
- Budget FY14.accdb
- Dropbox
- hs\_err\_pid7...
- FY15 Budget Secured.pdf
- Recycle Bin
- Adobe Acrobat
- Shortcut to...
- mabrixadmini...
- MSU\_official...
- hs\_err\_pid7...
- General Ledger Activity (EXC...
- Internet Explorer
- log.xls
- Business-Off...
- hs\_err\_pid8...
- Position Information ...
- MSU MainFrame....
- source...
- Google Earth
- Scanned from a Xerox mul...
- hs\_err\_pid1...
- Statement.pdf
- Shortcut to DPV
- Shortcut to Budget FY...
- Banner PROD
- hs\_err\_pid2...
- Position Informati...
- Fund Balance Reporting\_2...
- Shortcut to Position ...
- Shortcut to Administrati...
- Budget FY 2012-1013 R...
- Deferred Maintenance...
- minimum wage delete.xls
- hs\_err\_pid8...
- Position Informati...
- Unused Desktop...
- Budget Transfers
- RealPlayer
- PayPlan 2013 (2).xls
- Contract\_Ro...\_8-12-2012...
- Copy of 41102BUD...
- Budget Availability S...



# Banner – Customizing Links

The screenshot displays the Oracle Fusion Middleware Forms Services interface. The window title is "Oracle Fusion Middleware Forms Services". The menu bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", and "Help". The "Edit" menu item is circled in red. The main content area shows a tree view of the Banner application menu. The "Banner" folder is expanded, showing sub-items: "Student [\*STUDENT]", "Advancement [\*ALUMNI]", "Finance System Menu [\*FINANCE]", "Human Resources [\*HRS]", "Financial Aid [\*RESOURCE]", "General [\*GENERAL]", and "Texas Connection [\*TXCN]". The "Banner" folder and its sub-items are circled in red. The right sidebar contains "My Links" with links for "Change Banner Password", "Check Banner Messages", "FGIBAVL", "FGIBDST", "Personal Link 3", "Personal Link 4", "Personal Link 5", and "Personal Link 6". Below the links is a "My Institution" section with the "ellucian. UNIVERSITY" logo. The bottom status bar shows "Enter the object name; Press LIST for listing." and "Record: 1/1".

Display Options	Directory Options	My Links	Menu Settings	LD
Block 1	<b>Description:</b>	Enter the URL for the "My Institution" link.		
	<b>Default Value:</b>	http://www.mwsu.edu/		
	<b>User Value:</b>	http://www.mwsu.edu/		
Block 2	<b>Description:</b>	Enter the description for the "My Personal Link 1" link.		
	<b>Default Value:</b>	Your first personal link description		
	<b>User Value:</b>	SFAREGQ		
Block 3	<b>Description:</b>	Enter the URL or Banner object for the "My Personal Link 1" link.		
	<b>Default Value:</b>	Your first personal link URL		
	<b>User Value:</b>	SFAREGQ		
	<b>Description:</b>	Enter the description for the "My Personal Link 2" link.		
	<b>Default Value:</b>	Your second personal link description		
	<b>User Value:</b>	SHATERM		
	<b>Description:</b>	Enter the URL or Banner object for the "My Personal Link 2" link.		
	<b>Default Value:</b>	Your second personal link URL		
	<b>User Value:</b>	SHATERM		

*Note: You have to type in the command in two different blocks so that the command will work*

- Scroll down and repeat the process
- Click the *Save button*
- Hit the *OK button*
- Exit out of Banner and log back in

Oracle Fusion Middleware Forms Services

File Edit Options Block Item Record Query Tools Help

General Menu GUAGMNU 8.4.2 (PROD) - Wednesday, November 19, 2014 - Last login Wednesday, November 19, 2014 05:08:10 PM

Go To... Welcome, Debbie Vaughn. Products: Menu | Site Map | Help Center

**My Banner**

- Banner
  - Student [\*STUDENT]
  - Advancement [\*ALUMNI]
  - Finance System Menu [\*FINANCE]
  - Human Resources [\*HRS]
  - Financial Aid [\*RESOURCE]
  - General [\*GENERAL]
  - Texas Connection [\*TXCN]

**My Links**

- [Change Banner Password](#)
- [Check Banner Messages](#)
- [FGIBAVL](#)
- [FGIBDST](#)
- [Personal Link 3](#)
- [Personal Link 4](#)
- [Personal Link 5](#)
- [Personal Link 6](#)

**Banner Broadcast Messages**

**ellucian UNIVERSITY**

Press ENTER to start selection or expand/collapse menu.

Record: 1/1 | <OSC>

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## Next meetings:

- ✓ No December Meeting
- ✓ January 22nd – 10:00 am
- ✓ February 26th – AMG “Review”
- ✓ March 26, 2015 – 10:00 am

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# Account Managers Group

Open For  
Questions and Answers



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Thank you!

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