

Process Step Narrative

This process deals with the steps of completing a Memo of Commitment between Schools/ Departments. It is anticipated that one Memo of Commitment will be completed between the position owner and the account owner for each employee for each account being accessed. For this process, it is assumed that all of the necessary accounts that are to be accessed are active. It is the responsibility of the position owner to ensure that the position is 100% funded.

1. The process begins when the School/Department determines that a new or current employee will be supported by a funding source outside of their own department and will need to have the external School/Department's account code (FAS account) used in the UMB Employee Funding Profile within the eUMB system.
2. If the account is under the control/responsibility of a separate School/Department, then a Memo of Commitment needs to be drafted and agreed to between the position owner and the account owner.

(The memo is a standardized form that may be e-mailed/faxed back and forth between departments to obtain the necessary approvals.)

3. During this step, the position owner and the account owner discuss the funding allocation for the employee, the account that will be accessed, and establish a verbal agreement to continue with the process.
4. The position owner fills out the Memo of Commitment form with the necessary information about the employee, the account to be accessed, and the percentage of the employee's salary that will come from the account and e-mails it to the account owner for approval.
5. The account owner either approves or disapproves the funding source and distribution indicated on the Memo of Commitment. If the memo is not approved, return to step #1. If the memo is approved, it is signed and e-mailed/faxed to step #5. (The preferred method of transmitting the Memo is by e-mail. When e-mail transmission is not possible, faxing the Memo is permitted.)
6. The position owner in the School/Department receives the memo and performs an analysis to ensure that the funding source and allocation is appropriate (as discussed during step #3).
7. If the memo is found to be inaccurate by the account owner, then the account owner will initiate a discussion with the position owner to resolve the problem. This discussion may result in the process returning to step #3 where a new memo is drafted, or the correction being made in step #6.

If the memo is found to be accurate, the account owner proceeds to step #8.

8. The account owner e-mails/faxes the memo indicating his/her approval to the initiating School/Department position owner and proceeds to step #8.
9. The account owner retains a copy of the memo in his/her records.
10. The position owner receives the approved memo and adds a new effective dated UMB EFP to reflect the new account code.
11. The email/fax memo is placed in position owners and account owners records.