

Welcome to Focus on Finance & HR!

March 10, 2020



Agenda

- Introduction of New OIE Director
- Coronavirus Updates
- Foundation Dos & Don'ts
- Importance of SOC Codes
- Updates to Separation & Clearance System
- E-Contract Updates (Students & Faculty Summer Comp)
- Part-Time Faculty Appointment Reminders
- Upcoming Enhancements to WorkforUM & Org Charts
- Announcements & Deadlines

Introduction

Tiffany Cox

Director, Office for Institutional Equity

Coronavirus Updates

Al Simpson

Director, Environmental Health & Safety

Coronavirus Updates

- The University's latest updates & communications about the COVID-19 virus can be found online at <https://www.memphis.edu/coronavirusupdates>.

Coronavirus Updates



QUESTIONS?

UofM Foundation — Finance

Carolyn Stanley

Director, UofM Foundation

Disbursements

- Spend according to the Donor Agreement(OnBase)
- Donor Agreements and Fund Documents can be viewed in Onbase under Foundation – Fund Agreement
 - Some funds may not have a donor agreement
 - Checks are processed weekly on Tuesdays and Thursdays. Checks processing turnaround time is 7 to 10 working days.
 - Rush checks should be discussed with Foundation Director or Accounting Manager. All paperwork should be given directly to the individual.

Disbursements

- Spend directly from the Foundation
 - Submit expenditure request form with supporting documents(receipts, contracts, invoices, etc.)
 - International travel must be approved by the University in advance of travel
- Spend through University
 - Submit a budget request form to establish budget or University index to Grant Accounting.
 - Expenses will be processed through University under University's policies and procedures

Disbursements

- **Required Items (Auditing Purposes)**
 - For auditing purposes original detail receipts are required
 - Invoices should be paid timely to avoid late charges and rush checks
 - Avoid putting personal and business items on the same receipt
 - New vendors require a W-9 or SSN
 - All expenditures should have U#'s with the exception of new vendors
 - Receipts should be submitted for reimbursement within 30 days
 - Rental payments should be submitted with a contract
 - Transfer memos should state purpose and supporting documents should be included with paperwork

Disbursements

- Disbursements that need to spend through University
 - Salaries / Compensation
 - Cash awards to University employees
 - Payments to foreigner or foreign organization
 - Purchase through Tigerbuy

Miscellaneous Income

- **The Foundation only receipts non-gift income**
 - Income must be submitted along with a Foundation miscellaneous income transmittal form located at www.uofmfoundation.org
 - All funds that have a gift element and non-gift element will be accepted by the Gift Records Department
- Refund checks-All refund checks should go back to the fund the expense was paid from. The Foundation will not accept refund checks if the expense was not paid by the Foundation.

Foundation Forms

- <http://www.uofmfoundation.org/foundationforms/index.php>
- Expenditure Form
- Banner Access Form
- Foundation Budget Request Form
- Miscellaneous Income Transmittal Form
- Etc.

UofM Foundation — Finance



Appointment:	Multiple assignments permitted in TH only Hours must be tracked (E-Class TH)	Multiple assignments permitted in TE only Hours must be tracked (E-Class TE)	Background check not needed No time sheet needed (E-Class TH)	Supervisor: _____
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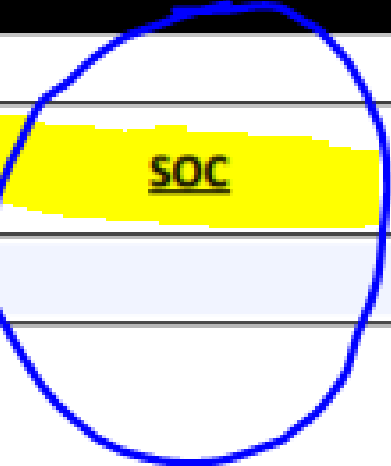
Department Contact: _____ Contact Phone: _____

Comments: _____

Section IV: Payment Grid **ONE FORM PER ASSIGNMENT**

[You may wish to view [payroll calendars](#) before selecting the Effective Date and the End Date].

<u>Posn #</u>	Proposed Effective Date	Approved Effective Date	End Date	Avg # Hours per wk	Pay Rate	Index	<u>E-Class</u>	<u>SOC</u>
					\$ per			



Understanding SOC Codes

Bridgette Decent

Director, Institutional Research

Understanding SOC Codes

What is the SOC?

- The Standard Occupational Classification system, or SOC, is designed to reflect the current occupational structure of the United States.

Where Do We Report SOC Data?

- IPEDS Human Resources Survey
- CUPA Human Resources (used in identifying positions)

Understanding SOC Codes

- The Human Resources Program Guide has a list of 28 major categories.

SOC Codes

SOC Code	Description	Definition
11-0000	Management Occupations	This group can include chief executives, general and operations managers, and legislators.
13-0000	Business and Financial Operations Occupations	This group can include but is not limited to, accountants, buyers, financial managers, human resources specialists, auditors, and others dealing with business and financial transactions.
15-0000	Computer and Mathematical Occupations	This group can include but is not limited to, computer and information researchers, technicians, database administrators, networking specialists, mathematicians, and statisticians

Where Do We Use SOC Codes at UofM?

Every job at the University of Memphis has a SOC code.

- Permanent positions & faculty: SOC codes are linked to positions.
- Temps and Graduate Assistants: SOC information is entered at the time of hire.

Coding Rules

Classify based on work performed, and required skills,
NOT on job title.

- Child Care Support Specialist who does office work=
43-0000 Office and Administrative Support
- Child Care Support Specialist who provides
childcare= 39-0000 Personal Care and Service
Occupations

Coding Graduate Assistants

GA—Teaching

GA—Research

GA—Management

GA—Business and Financial Operations

GA—Computer, Engineering, and Science

GA—Community Service, Legal, Arts, and Media

GA—Library and Instructional Support

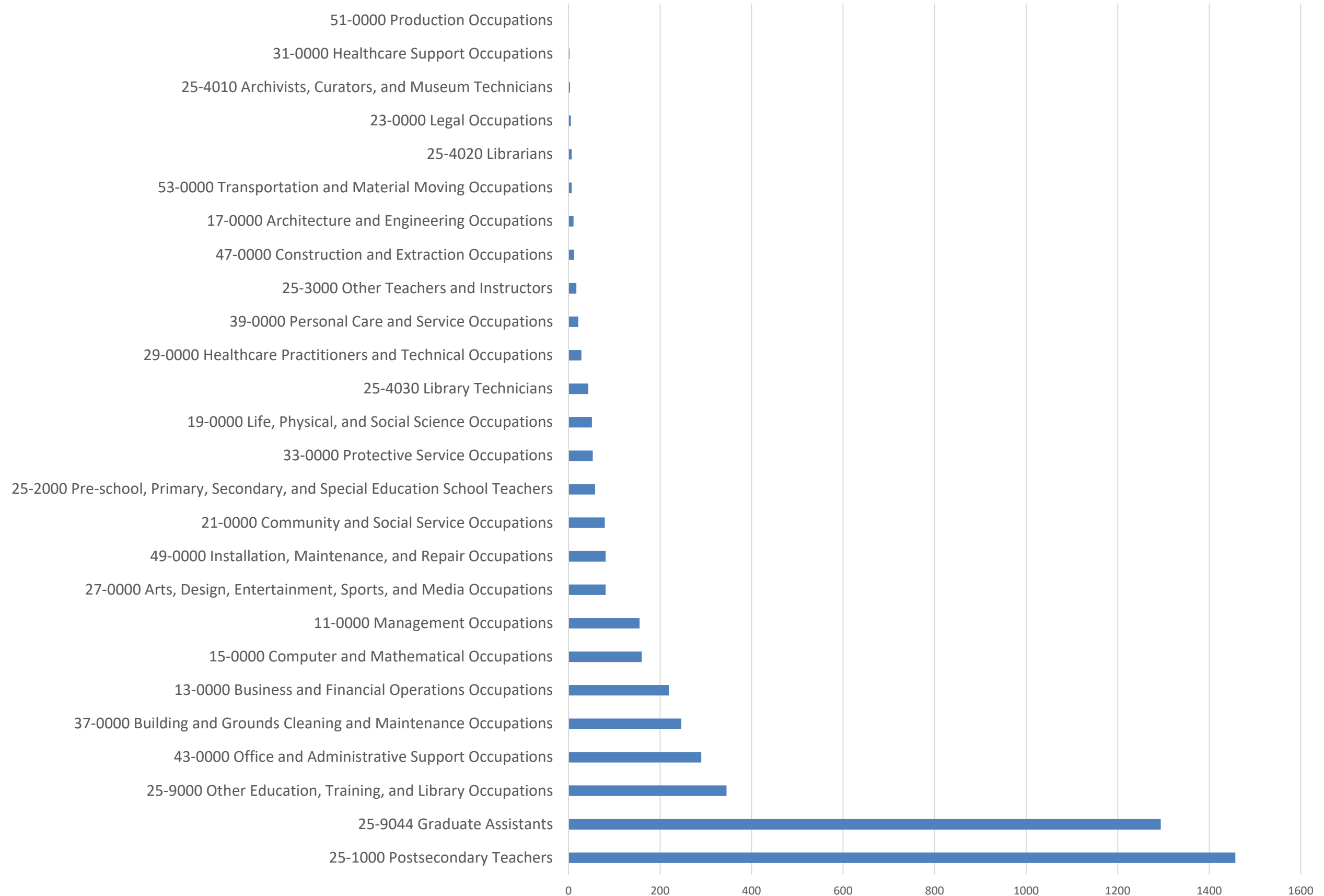
GA—Healthcare Practitioners and Technical

GAs working in all other occupational categories (i.e., clerical/secretarial, public service, etc.)

GA in the Department of Computer Science doing research = GA-Research

GA building websites for the IT department = Computer, Engineering, and Science.

University of Memphis Fall 2019 Employees by SOC



Updates to Separation & Clearance System

Danny Linton

Associate Director, Human Resources

Updates to Separation & Clearance System

- Employees can no longer submit a form on themselves; a supervisor/designee should submit on behalf of the employee.
- Eliminated the manager's acknowledgment section; this was a constant source of delays and mistakes.
- At any stage of submission or processing, the employee's resignation document (.doc or .pdf formats are acceptable) can be (and should be) uploaded to the employee's form. This means that at the time of submission, the supervisor should upload the resignation letter if it exists. If HR is in possession of the letter, we will upload it to the form during or after the processing stage.
- The automatic emails sent upon submission of the form and processing of the form have not changed.

E-Contract Updates

Danny Linton

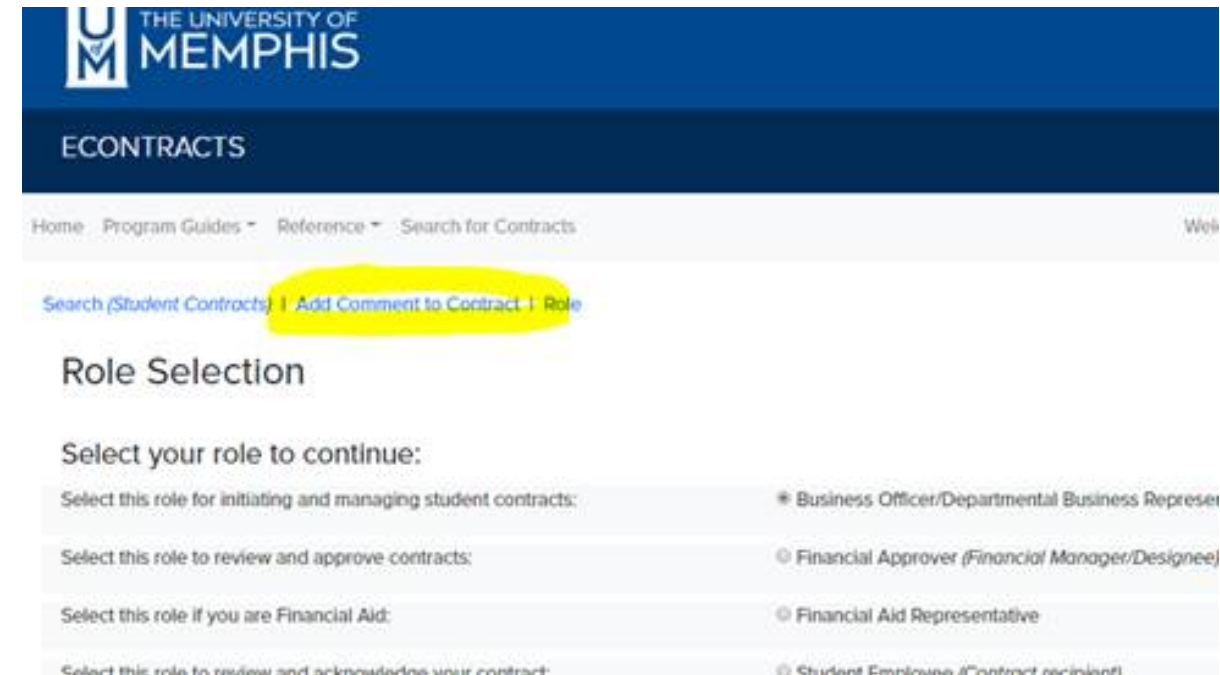
Associate Director, Human Resources

E-Contract Updates

- **Faculty Summer Compensation:**
Beginning now, faculty members cannot initiate their own contracts.
- **FSC will now be offered as a standing e-contract training like all others.**

E-Contract Updates

- **Student Workers:**
In the breadcrumb bar, you know can add a comment to an existing contract regardless of the contract's status.
- **To use this service you must have the Contract Number & Banner ID of the contract recipient.**
- **If a department has changes to contracts that do not require a change to the job loaded in Banner they can utilize this service for documentation and amendments to the signed contract, and coordinate among each other regarding working hours for students working in multiple departments.**



The screenshot displays the 'ECONTRACTS' interface of The University of Memphis. At the top, the university logo and name are visible. Below the header, a navigation bar includes links for 'Home', 'Program Guides', 'Reference', and 'Search for Contracts'. A breadcrumb trail shows the path: 'Search (Student Contracts) > Add Comment to Contract > Role'. The 'Add Comment to Contract' link is highlighted in yellow. The main section is titled 'Role Selection' and prompts the user to 'Select your role to continue:'. Below this, there are four radio button options for role selection:

Select this role for initiating and managing student contracts:	Select this role to review and approve contracts:
<input type="radio"/> Business Officer/Departmental Business Represen	<input type="radio"/> Financial Approver (Financial Manager/Designee)
<input type="radio"/> Select this role to review and approve contracts:	<input type="radio"/> Financial Aid Representative
<input type="radio"/> Select this role if you are Financial Aid:	<input type="radio"/> Student Employee (Contract recipient)
<input type="radio"/> Select this role to review and acknowledge your contract:	

E-Contract Updates

- **Temporary Employees:**
A Process Improvement group is meeting now to develop an e-contract process for temps. Expected launch is January 2021.

WorkforUM and Org Charts: Updates & Reminders

Danny Linton

Associate Director, Human Resources

WorkforUM Updates & Reminders

Storing Interview Notes

- In the coming weeks, HR will be adding a new tab to every applicant's Application page.
- This new tab, called Supporting Documents, is to be used to electronically store interview notes from your committee.
- Uploading to each application will prevent you from having to maintain manual paper files for the required 5 years.

WorkforUM Updates & Reminders



Job application: Daniel Linton (Staff, Administrative Executive, & Contract Coaches)

Current Status: Under Review by HR

Application form: Application

Full name: Daniel Linton

Address:

[REDACTED]

[REDACTED]

United States of America

Username: bweiser

Email: dmlinton@memphis.edu

Phone (Primary): [REDACTED]

Phone (Secondary):

Position Type: **Staff,
Administrative Executive, &
Contract Coaches**

Office: **Vice President Research
(283000)**

Created by: **Daniel Linton**

Owner: **HR**

Take Action On Job Application

★ View Posting Applied To

★ Preview Application

✎ Edit Application

📄 Reactivate

Summary

Documents

Recommendations (0 of 0)

Supporting Documents

History

Reports

Supporting Documents

Add Document

Date	Name	File Name	Description	Actions
02/27/2020 03:28 PM	dmlinton	Interview Notes.doc		Remove

WorkforUM Updates & Reminders

Online Offer Letters

- In 2020, HR will be testing the use of online offer letters within hiring proposals. This is an electronic alternative to mailing a paper offer letter to a candidate (typical on the faculty side).
- Candidates can sign electronically or sign via ink w/scan & upload.
- More details to come!

WorkforUM Updates & Reminders

Part-Time Faculty Process

- The new 2020-21 PTF postings are now online.
- Remember that when hiring someone from these pools, these steps should be followed:
 - Code the selected candidate: under ‘Review by Department’ selection reason of ‘Offered Position’.
 - You must code each applicant that has applied up to that point. These will be under ‘Review by Department’ and determine if candidates are ‘employable’ or non-employable.
- https://umwa.memphis.edu/econtract/pdf/ptf_appointment_guidelines.pdf

WorkforUM Updates & Reminders

- Common Errors
 - Picking Supervisors
 - “Move in Workflow” link disappearing
 - Moving to Hired instead of Recommend for Hire
 - Getting an applicant back from Not Hired status

Org Chart Updates & Reminders

- The org charts offered at <https://www.memphis.edu/hr/orgcharts.php> have been optimized to no longer require a plug-in download.
- They also can now be viewed in any up-to-date Web browser.
- Check your charts and make any changes via WorkforUM supervisor change actions.

Announcements & Deadlines

Announcements & Deadlines



- **First-Time Attendees at Focus on Finance & HR**

Announcements & Deadlines

- Welcome Comfort Agyin-Birikorang!



Announcements & Deadlines

- Don't forget to review the University's current job openings at workforum.memphis.edu.
- Subscribe to our Twitter feed at @umemphisjobs!
- NEW! Follow us on Instagram! @uofmhr

Announcements & Deadlines

SPRING BUDGET – KEY DATES

- **Revenue Projections ~ Due Friday, March 13, 2020**
 - Email with instructions will be sent out Friday February 28, 2020
 - Instructions for preparing revenue budget revisions can be found on the Financial Planning website under the Frequent Asked Questions tab
- **Capital/R&R/Facility Projects ~ Due Monday, March 30, 2020**
 - If a Summer project is planned, submit by Spring deadline
- **Expenditure & Position Paper Budget Revisions ~ Due Monday, March 30, 2020**
 - Email with instructions will be sent out Friday February 28, 2020
 - If a position needs to be transferred for Fall, submit the transfer BR before deadline
 - Remember: no base budget revisions will be entered between the deadline and the opening of FY21
- **BD4 Online Budget Revisions ~ Due Friday, April 3, 2020**
 - Remember to align department budgets for the remainder of FY20
 - No functional changes after deadline

Announcements & Deadlines

- New Employee Orientation now lasts a half-day.
- After returning from lunch about 1:00 or 1:30pm, employees will go to their home departments.

Announcements & Deadlines

- Hiring departments should assist employees with their assigned Post-Orientation Tasks (available in the MyMemphis portal's Employee tab).

New Employee Post-Orientation Tasks

Review/Update Form W-4

E-Mail Account Setup

Campus ID Card

Review Parking Information

Review Payroll Information

Complete Online Confidentiality Acknowledgement

Complete IT Security Training

Complete Title VI Training

Complete Discrimination & Harassment Prevention Training

Complete FERPA Tutorial

Using your memphis.edu e-mail address, complete:

Payroll Direct Deposit

Vendor Payment Direct Deposit

Announcements & Deadlines

- Performance appraisals
- Annual faculty appraisals were released in WorkforUM on January 28.
- Annual staff appraisals, completed in the SAMS system, are due to Human Resources by April 30, 2020 and should (generally) reflect May 1, 2019 – April 30, 2020.
- SAMS training is available now in Learning Curve.

Announcements & Deadlines

- Accounting Basics Training
April 17, 2020 - 1:30pm
AD178
- Budget Basics Training
May 28, 2020 - 9:30am
AD178
- Timesheets, Leave Reports, & Approvals
April 16, 2020 – 10:00am
AD178

Announcements & Deadlines

- **Customer Service Training**
March 10, 2020 – 2:00pm
- **Communication, Civility, & Ethics in the Workplace**
March 13, 2020 – 10:00am
- **True Colors (Personality Assessments)**
March 20, 2020 – 10:00am

All sessions in AD177B. Sign up in Learning Curve!

Announcements & Deadlines

- **Faculty Summer Compensation E-Contracts**
April 16, 2020 – 2:00pm
AD178
- **WorkforUM Training**
April 29, 2020 – 1:30pm
AD178

Announcements & Deadlines

- **Pre-Retirement Seminar**
 - Thursday, April 30
 - University Center
 - Invitations first to employees potentially nearing retirement, then open to all University employees as space allows

Announcements & Deadlines



NEXT MEETING

April 14, 2020

340 University Center

Thank you for attending!
memphis.edu/focus

