FOCUS ON FINANCE & HR

May 20, 2025

AGENDA

- SOAR Project Updates
- Vendor Payment Transmittal Portal & Year-End Information
- Announcements & Deadlines

SOAR Update: Timeline, Testing, Cutover & Training

Shundra White Helton, Information Technology Services

SOAR Project Update

- ✓ Emphasis on SIT2 execution and Re-Planning
- ✓ Target SIT2 completion this week (5/19 exit meeting)
- ✓ Re-Planning for three (3) weeks, concluding late May

Testing Update

SIT2 Testing has been extended

- The teams are dedicating full effort to completing this phase, as they work through boundary systems, reports, end-to-end testing, and defect fixing to ensure everything is functioning accurately.

- This phase is critical for

  - Verifying processes are working across modules (end-to-end) – must get this right!

  - External (boundary) applications are interacting with Oracle as expected

  - Verifying that custom objects, such as reports and fast formulas are working as expected

- Once confident in the results, we'll move forward with the next project milestones.

SOAR Updated Timeline

KEY DIFFERENCES*

- Two Additional Testing Cycles

- Cutover Practice Runs: Two Total

- End User Training Mid-October – November

- Minimal-to-No Activity During Holiday Break (Last 2 Weeks in December)

- Train-the-Trainer in September

- New Direction for Deferred Pay

*As of 5/20/25 understanding.

Cutover: Walking Back some Earlier Guidance

Because of the change in go-live date, systems will remain available in summer and end users can transact as they normally would during this time. **Please refer to year-end guidance** from the Accounting office.

Projects & Grants

- Processes and systems available

Procurement/Payables

- Ok to create and process POs in June
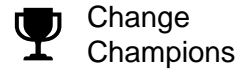- Faculty travel processes: proceed as normal

Core HR

- E-Contracts: continue to submit as normal

Budgeting/Finance

- Fixed Asset records: process as normal

Upcoming Events

🏆 Change Champions	📹 FOFHR
📜 Dean / Faculty Engagement	📰 Newsletter
👥 Advisory	🎓 Readiness Sessions
🏫 Town Hall	📊 Org Change Readiness Survey

Notes:

- Remainder of May to be dedicated to replanning OCM

- Any May events are being used to reinforce replanning message for the project

- Next newsletter to coincide with release of new timeline

MAY

SUN	MON	TUES	WED	THURS	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15 🏆	16	17
18	19	20 📹	21	22	23	24
25	26	27	28	29	30	31

JUNE

SUN	MON	TUES	WED	THURS	FRI	SAT
1	2	3	4	5 📜	6 ✉ Blackout	7
8	9	10	11	12	13	14
15						21
22						28
29	30 ✉	1 ⭐ Go Live ✉	2 ✉			

To be re-evaluated

SOAR Updates to FOF&HR Over the Summer

- Last FOF&HR meeting for this cycle is June 17; next meeting in September
- Important information will need to be acquired before next FOFHR in September
  - Updated SOAR timeline
  - End User Training and Train-the-Trainer
  - Testing (SIT3 and SIT4 updates)
- Please stay tuned to the following
  - SOAR Insiders communications
  - Project Newsletters
  - SOAR website

Vendor Payment Transmittal Portal & Year-End Info

Christie Barfield, Accounts Payable

Vendor Payment Transmittal Portal

Please be advised that July 3, 2025 is the final day to submit FY-25 payment requests through the Vendor Transmittal Portal.

Submission Guidelines:

• **Invoices:** Ensure that each invoice form uploaded includes approval from the Financial Manager or Designee. Examples include Check Request, Payment to Contractors, Research Participants, and Cash & Meal Reimbursements for Students/Guests.

• **Invoices with Purchase Orders:** Before submitting through the portal, complete a receipt for goods and services in Tigerbuy.

Accounts Payable Year-End Checklist

Cancel/De-obligate unused non-travel purchase orders procurement@memphis.edu	**Friday, May 30, 2025**
Receipt goods and services in Tigerbuy for vendors (Send Invoice, PO# and Receipt #)	Friday, June 13, 2025
Upload receipts for Chrome River non-travel claims	Thursday, July 3, 2025
Last day to submit FY25 invoices	Thursday, July 3, 2025
Any travel claim with a July 1st date will be processed in FY26	Friday, July 11, 2025

Year-End Information

https://www.memphis.edu/accounting/pdf/yearend.pdf

Year-End Information

QUESTIONS?

Announcements & Deadlines

Danny Linton, Human Resources

Announcements & Deadlines

- Welcome to all first-time attendees at Focus on Finance & HR!

- Need someone added to the Focus on Finance & HR mailing list? Don't forward to them—forward to us!

- hr@memphis.edu

Announcements & Deadlines

Volunteer Reminders!

- All volunteers for any University program must be registered with the State of Tennessee Board of Claims/Risk Management.
- Volunteers are any unpaid persons who are providing their time and effort to support various areas across campus and may include but are not limited to: members of the community serving on university/athletics committees, parents/guardians within the University Schools, and students who may provide services for departments or programs.
- Students (graduate assistants/student workers) who receive a payroll check from the University do not need to register!

Announcements & Deadlines

Volunteer Reminders!

- HR captures volunteer registrations through our website and then sends these details forward to the State of Tennessee Board of Claims/Risk Management.

- The registration form MUST BE started by the volunteer's supervisor at the UofM, not the volunteer.

- The State Board of Claims/Risk Management has added a new required field, Date of Birth, as part of their requirements. Be sure you get this information from the volunteer!

- If you have volunteers assisting with camps during the upcoming summer that will have minors as attendees, be sure to refer to the Youth Programming and Participation of Minors on Campus guidelines and policy site.

Announcements & Deadlines

- **News from Procurement:**
  Replacements for expiring travel and/or procurement cards are coming soon. More info will follow.

Announcements & Deadlines

- **University Records Management:**
  Records Certifications are due by May 31. Questions? Contact Ladonnal Curry at lcurry@memphis.edu.

Announcements & Deadlines

- Although the deadline for staff performance appraisals has passed (April 30th) for employees not working through a current Probationary Period, we remind departments that any outstanding evaluations should be submitted as soon as possible.

- Employees who completed a recent Probationary Period on or before December 31, 2024, will need an Annual Appraisal (marked as "Other") completed for them for this Staff Appraisal cycle.

- It is vitally important for each employee to have a complete and accurate annual appraisal captured in SAMS (Staff Assessment Management System) for this current cycle as it will be the last year Annual Staff Appraisals will be completed in the current system and a current rating is needed to be transferred into Oracle.

Announcements & Deadlines

- As we move closer to Oracle Go-Live, we have limited additions & changes to the Chart of Accounts to allow for a smooth transition to the new system.

- We are not creating new E&G Funds, Account Codes or Program Codes in Banner.
  - Grants and Foundation Funds will still be created as needed
  - Activity Codes can still be created
  - Indexes can still be created

- New PI Orgs can be requested until September 5, 2025 for new Faculty.

Announcements & Deadlines

Mental Health in May

- The theme this year is "Turn Awareness into Action."

- Human Resources is collaborating with the R. Brad Martin Wellness Center, Here4TN, University Counseling Center, and Lambuth Campus to offer a variety of in person events and online webinars. All faculty and staff are invited and encouraged to participate.

- Schedule of events: https://www.memphis.edu/hr/mhamonth.php

Announcements & Deadlines

- Check your org charts!
- https://www.memphis.edu/hr/orgcharts.php
- It is imperative that reporting structures are accurate as we phase into Oracle.
- Need to make changes? Use the Request to Change Position Supervisor action in WorkforUM.
- Remember, we track positions to positions, not people to people.

Announcements & Deadlines

Social Security Administration Update

- Employees must make an appointment to get a new Social Security card, Replacement, or Name Change.

Scan the QR code to get started. You may be able to start or complete your request online.

1 Open the camera app on a smart phone or tablet.

2 Point the camera at the QR code.

3 Tap the browser that appears.

Announcements & Deadlines

- LinkedIn Learning is available for free to all employees!
- Create your own goals and learning paths or assign them to your team.
- Over 15,000 technical and soft skills development opportunities available!
- You can connect your personal LinkedIn account to your trainings taken at UofM to share what you've learned.
- Available in the MyMemphis portal.
- Keep in mind that LinkedIn Learning is a great resource to use especially on days where the University is under a modified work schedule due to inclement weather or any other reason.

Announcements & Deadlines

What should I do if I am injured on the job?

- If it is an emergency, seek treatment at the nearest emergency room. Contact your supervisor and Human Resources as soon as possible to start the claim process.

- In a non-emergency, notify Human Resources & your supervisor immediately of what happened, how it happened, who saw what happened, and if you were injured as a result of the accident. You and your supervisor should then contact the Workplace Injury and First Notice of Loss Call Center at 1.866.245.8588 to speak with a registered nurse who will evaluate the nature of your injury and determine your immediate care or treatment options.

Announcements & Deadlines

What should I do if I am injured on the job?

- If no medical treatment is recommended, the registered nurse will document the call for you and your supervisor and enter an incident report in the reporting system.

- If medical treatment is recommended, the nurse will direct you to the nearest State approved medical provider.

- **You and your supervisor will need to complete the [First Report of Injury or Illness form](). This form should be returned to the Environmental Health and Safety Office. Please complete within 24 hours of the injury. If the accident is not reported within 48 hours, the employee's department will be assessed a fine by the State Comptroller's Office.**

Announcements & Deadlines

Separation & Clearance

- Please remember to immediately complete an online separation notice for any employee in your area that is departing the University prior to their departure date!

- Not doing so places the University at risk because the employee would still have system access and could lead to an audit finding.

- Keep in mind it is HR's practice to process separation/clearances closer to the date of separation so that leave balances can be accurately calculated for payouts.

- https://umwa.memphis.edu/sep-clear

Announcements & Deadlines

- PLEASE make sure that all leave reports for your department are submitted and approved each month!

- This includes all exempt staff and faculty employees.

- Leave reports are due by the 10th of the month following the month being reported.

- Remember to put at least one "0" on any one date for one leave category (such as Annual Leave) in any month in which no leave was used.

Announcements & Deadlines

Next Online Training for *Effective Search Committees*:

- June 12, 2025, 10am
- Sign up in [Learning Curve](#)!

Announcements & Deadlines

Form I-9 Information

- Visit 178 Administration Building, M-F 9:00am-3:00pm for I-9 assistance. Appointments are not needed during these hours.
- HR is also offering online appointments by contacting i9@memphis.edu.
- Other questions? i9@memphis.edu

Announcements & Deadlines

- Remember to review the University's current job openings at workforum.memphis.edu.

- Follow the Division of Business & Finance on X (formerly Twitter) at @uofmemphisbf!

- Subscribe to our WorkforUM X (formerly Twitter) feed at @umemphisjobs!

- Follow us on Instagram! @uofmhr

Thank you for attending!

Next Meeting: June 17, 2025 at *memphis.edu/fofhr*

Recordings & presentations available at *memphis.edu/focus*