



FOCUS ON FINANCE & HR

September 20, 2022

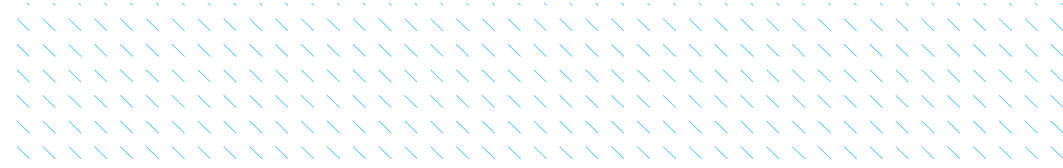
Agenda

- Reminder of Purpose of FOF&HR
- Benefits Open Enrollment Period
- International Employee Hiring
- Complaint Triage Team
- Policy Update
- Announcements & Deadlines



PURPOSE OF FOCUS ON FINANCE & HR

Share this info with your areas!



BENEFITS OPEN ENROLLMENT PERIOD

Suprena Grear

Benefits Open Enrollment Period

- Open Enrollment October 1-14 for active employees (October 10-28 for retirees)
- HR Open Enrollment info website [online now](#)
- Benefits Fairs:
 - Main Campus: October 5th from 10-2 at the UC Ballroom
 - Lambuth Campus: October 6th 11-2 at the VJ Wisdom Parlor
 - Flu shots will be offered at both Benefits Fairs
- 8 informational sessions (4 in-person and 4 via Zoom with one of the in-person sessions at Lambuth Campus)

What's New for 2023

- Deductibles for Premier and Standard Preferred Provider Organization plans and the Consumer-Driven Health Plan will increase in range from \$0-\$26 per month.
- Co-insurance for Premier PPO will increase.
- Out-of-pocket maximums for Standard PPO and CDHP will increase
- Emergency room cost for Premier and Standard PPOs will change from copay to deductible and coinsurance.
- Allergy serum for Premier and Standard PPOs will change to deductible and coinsurance.

What's New for 2023

- For all PPOs, specialty drug cost sharing will change to two cost tiers and increase.
- The CDHP maintenance medication list is changing to comply with IRS rules. Medications on this list are available at a lower cost when filling a 90-day supply.

Enhancements

- Applied Behavior Analysis for Premier and Standard PPOs will change from copay to deductible and coinsurance. The PPO deductible will be waived for in-network ABA.
- The CDHP deductible will be waived for in-network blood sugar, cholesterol and blood clotting testing, when the test meets certain criteria.
- The state will increase its funding of the Health Saving Account for enrolled CDHP members to \$500 (employee tier) and \$1,000 (all other family tiers). HSA IRS maximum contributions are increasing to \$3,850 for employee only and \$7,750 for all other family tiers. Members 55+ can add \$1,000 more each year. The limits include the \$500 or \$1,000 wellness incentive.

Updates for 2023

- Vision vendor will change from Davis Vision to EyeMed for 2023; premiums will increase for 2023. There are benefit changes and enhancements.
- Medical Flexible spending account annual limit will increase to \$2,850; You can carry over \$570 at the end of 2023.
- Limited-purpose annual limit will increase to \$2,850; You can carry over \$570 at the end of 2023.

Current 2022 Life Insurance

Basic Term Life / Accidental Death & Dismemberment (AD&D) Insurance

The State provides, at no cost to the employee:

- \$20,000 basic term life insurance
- \$40,000 basic accidental death and dismemberment (AD&D)

If you are enrolled in health insurance, your coverage automatically increases, based on your age and salary:

- Up to \$50,000 term life insurance
- Up to \$100,000 AD&D insurance

Members are responsible for the additional cost of coverage.

Dependents enrolled in health insurance are each covered for:

- Basic term life \$3,000
- Basic AD&D based on your salary and family composition.

New for 2023 Life Insurance

- **IMPORTANT! New for 2023:** For all eligible employees, **basic term life insurance** coverage will be 1.5 times the employee's base annual salary as of Sept. 1 of each year, **even if the employee is not enrolled in health insurance**, to a maximum of \$50,000.
- The calculation to determine the employee's level of basic term life insurance coverage will be rounded up to the next \$1,000. For example, if the result of calculating 1.5 times the employee's annual salary is \$40,125, the result will be rounded up to \$41,000 of basic term life coverage. The **basic AD&D coverage** will continue to be two times the basic term life coverage, up to \$100,000.
- **Employees pay the monthly premium on any additional coverage above the state paid amounts** of \$20,000 for basic term life and \$40,000 for basic AD&D and for all dependent coverage.

New for 2023 Life Insurance

New for 2023: Employees can opt out of the employee-paid basic term life insurance coverage over \$20,000 and basic AD&D coverage over \$40,000 along with dependent coverage. To do this the employee **MUST** make this selection in Edison during Annual Enrollment.

- **Important! This is a permanent choice.** Employees should make this decision with caution. Employees who opt out of this additional coverage may not re-enroll in the employee-paid coverage (the amount above what the state pays) and dependent coverage unless they later have a qualifying event.
- **New for 2023:** Employees will be able to add and remove eligible dependents for enrollment in the basic **dependent** term life/basic AD&D insurance. Dependents do not have to be enrolled in health insurance to qualify for this coverage. **If an employee wants to add or remove dependents from this coverage, the change must be made in Edison during Annual Enrollment.**
- Existing employees and any dependents will automatically be enrolled; employees must go into Edison and opt out of the additional coverage beyond the employer-paid coverage if they wish to do so.

New for 2023 Voluntary Accidental Death and Dismemberment Insurance

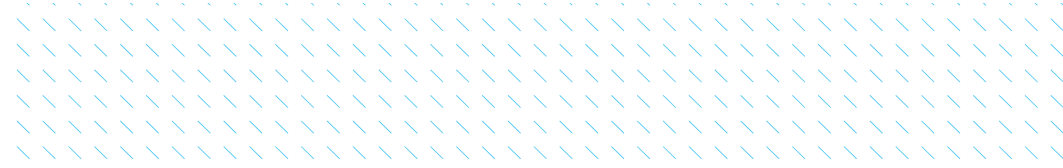
- Employees: You can buy voluntary AD&D insurance to give additional protection if the employee or employee's covered dependent's death or dismemberment is due to an accident. This is in addition to the basic AD&D coverage. The employee will pay the full monthly premiums. Enroll and keep the beneficiary information current in Edison.
- NEW! Employee coverage in 2023 will change from a coverage level based on salary to a choice of these five amounts: \$50,000, \$60,000, \$100,000, \$250,000 or \$500,000.
- NEW! Dependent enrollment in 2023 will be on a coverage tier basis [spouse only, spouse + child(ren), or child(ren) only] instead of generic family coverage. Dependents may be removed or added for this coverage via Edison ESS.
- Dependent voluntary AD&D coverage is based on a percentage of the employee's voluntary AD&D coverage.
- Employee premium rates will increase in 2023.
- Dependent premium rates will be per \$1,000 of total dependent coverage, instead of per family unit.
- Benefits will be paid for dismemberment if the loss occurs within 180 days of the accident, provided the employee or dependent was covered on the date of the accident and met the established criteria. Accident could occur at work or elsewhere.
- Coverage is available at low group rates, no questions asked.
- Premiums will be for the coverage level the employee selects.

What Do I Need to Do?

- memphis.edu/edison
- Review current benefits using the [2023 Eligibility and Enrollment Guide](#)
- View the animated YouTube videos to learn more about your benefits at partnersforhealthtn.gov
- Visit the [HR Open Enrollment website](#) for information and [plan-by-plan instructions](#)

Benefits Open Enrollment Period

QUESTIONS?



INTERNATIONAL EMPLOYEE HIRING

**John-Michael Ryall &
Darren Wibberding**

International Employee Hiring

- Applicant Pool / Application Evaluation
- Visa Types & Factors to Consider
- Visa Processing Timeline
- Costs
- Process Flow
- Maintaining & Renewing the Visa
- immigration@memphis.edu



COMPLAINT TRIAGE TEAM

Vicki Deaton

State of TN Laws

The State of Tennessee Audit Committee Act requires that the UofM Board of Trustees Audit Committee provide a means by which members of the campus community may confidentially report illegal, improper, wasteful, or fraudulent activity at the University.

UofM Board of Trustees Audit Committee

The UofM Board of Trustees Audit Committee Charter says the committee must “ensure that a process exists for assessing, reporting, and investigating illegal, fraudulent, wasteful, or improper activity at the University, including a confidential reporting mechanism.”

University Management

The University is committed to the responsible stewardship and accountability of our resources.

University management is responsible for establishing and maintaining internal controls within the organization.

University Management

The basic elements of a proper control system include:

- Creating a culture of honesty and high ethics
- Evaluating risks and implementing processes, procedures and controls to prevent, deter and detect fraud, waste and abuse
- Developing an appropriate oversight process

UofM Complaint Triage Team

The Audit Committee has the authority to conduct or authorize investigations into any matter within its scope of responsibility.

In August 2020, University management created the Complaint Triage Team (CTT) with input from the Audit Committee.

UofM Complaint Triage Team

The Audit Committee authorized the CTT to:

- Establish methods to report suspected fraud, waste, and abuse (FWA), illegal activities, conflicts of interest, and noncompliance with policies, laws, and regulations
- Establish methods to process reports received
- Conduct investigations
- Communicate results with Audit Committee, UofM management, and state and federal agencies as required

UofM Complaint Triage Team

Members of the CTT:

1. Chief Compliance Officer
2. University Counsel
3. Chief Audit Executive
4. Chief Human Resources Officer

How Are Reports Made?

If you have information and are reasonably certain about activities you believe constitute illegal, improper, wasteful, or fraudulent activities, you may submit a report online to the University of Memphis Office of Internal Audit and Consulting through the Internal Audit page of the University's website. Reports may be made anonymously.

<https://www.memphis.edu/audit/report.php>

Or you may contact Internal Audit at 678-2125 or UoM_audit@memphis.edu

How Are Reports Made?

Other Methods of Reporting

- Tell your supervisor
- Notify a member of the Complaint Triage Team
- Notify another University official
- Contact the Tennessee Comptroller @ 1-800-232-5454 or <http://www.comptroller.tn.gov/hotline>

Other Complaints

Contact the **Office for Institutional Equity** to make a complaint of discrimination, harassment, sexual misconduct or retaliation.

Email: oie@memphis.edu

Online reporting form at memphis.edu/oie

Phone: 901.678.2713

When Should Reports Be Made?

All UofM faculty, staff, students, and other interested citizens are strongly encouraged to report known or suspected illegal, improper, wasteful, or fraudulent activity at the University.

It is not necessary to have proof of wrongdoing at the time of reporting dishonest or suspicious activity; however, anyone reporting such activity should have reasonable grounds for doing so.

When Should Reports Be Made?

Before making allegations of fraud, waste or abuse, be reasonably certain of any claims. Such allegations could seriously and negatively impact the accused individual's life and adversely affect the working environment of the department.

When Should Reports Be Made?

UofM Policy Definitions:

Fraud – An intentional deception that violates a law or the public trust for personal benefit or the benefit of others.

Waste – Behavior involving the extravagant careless, or needless use of government funds, property, and/or personnel.

Abuse – Behavior involving the use of government funds or property that a prudent person would not consider reasonable and necessary business practice given the facts and circumstances.

Reference: GE2014 Reporting Fraud, Waste, or Abuse of University Resources

When Should Reports Be Made?

Examples of activities that should be reported:

- Theft or misappropriation of funds, supplies, property, or other institutional resources
- Forgery or alteration of documents
- Unauthorized alteration or manipulation of computer files
- Falsification of reports to management or external agencies
- Pursuit of a benefit or advantage that could be a conflict of interest
- Authorization or receipt of compensation for hours not worked

Protection Under State Law

The State of Tennessee Audit Committee Act prohibits retaliation for reporting or cooperating with the Audit Committee, Internal Audit, or TN Comptroller auditors, or for reporting any facts to the University. Any person who knowingly and willingly retaliates or takes adverse action of any kind against any person for reporting alleged wrongdoing commits a Class A misdemeanor.

Protection Under State Law

As investigations are performed, the reporting individual's confidentiality is protected under TCA Title 10, Chapter 7, unless subject to court action requiring disclosure. If there is a separate legal obligation to investigate the complaint (e.g., complaints of illegal harassment or discrimination), the University cannot guarantee anonymity or complete confidentiality as other outside agencies could be involved.

What Happens When Reports Are Received?

The CTT meets to discuss the report and:

- Determines if alleged activity falls under the umbrella of possible illegal, improper, wasteful, or fraudulent activity
- Refers any actual or alleged reports of criminal activity to the appropriate law enforcement agency
- Informs the TN Comptroller if necessary
- Determines if there is enough information to perform an investigation
- Assigns the investigation to the appropriate University office or external agency

UofM Reporting to the TN Comptroller

The State of Tennessee Audit Committee Act also includes that if we believe that illegal, improper, wasteful, or fraudulent activity may have occurred, then we must promptly report the information to the TN Comptroller of the Treasury.

UofM Reporting to the TN Comptroller

TCA 8-4-119

Any state agency having determined that a theft, forgery, credit card fraud or any other intentional act of unlawful or unauthorized taking, or abuse of public money, property, or services, or that other cash shortages have occurred in the state agency, shall report the information to the office of the Comptroller of the Treasury.

UofM Investigations

The investigation report is a public document. The investigating office shares the report with the Triage Team, the Audit Committee, and effected University management. The Chief Audit Executive will also share the report with the TN Comptroller as needed.

A management letter will be provided for each investigation that identifies issues that need to be brought to the attention of management.

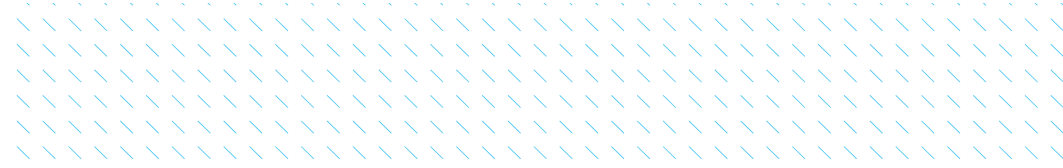
Complaint Triage Team Contact Information

Vicki D. Deaton
Chief Audit Executive
901.678.2125 / vddeaton@memphis.edu

Melanie Murry
University Counsel
901.678.2155 / mmurry@memphis.edu

Maria Alam
Chief Human Resources Officer
901.678.2867 / malam@memphis.edu

Ceecy Reed
Interim Director, Office for Institutional Equity
901.678.4930 / creed@memphis.edu



POLICY CORNER

Danny Linton

Policy Corner

- [IT6006 - Authorization for Use of Electronic Signatures](#)
- [GE2050 - Motorized Personal Mobility Vehicle Use Policy](#)
- [HR5016 - Bonuses and Incentives](#)
- [GE2048 - Alcohol Use and Sale on Campus](#)
- [GE2047- Environmental Health and Safety](#)



ANNOUNCEMENTS & DEADLINES

Danny Linton

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

HR Staff Changes

- Kiana Holley, HR Service Center Associate
- Elantra Owens, HR Service Center Associate
- Kaitlyn Ricelli, Data Management Associate
- Lauren Byrd, Lead Data Management Associate (promotion)
- Rose Pettijohn, Sr. Facilitator, Employee Engagement, Learning & Development (promotion)

Announcements & Deadlines

Finance Staff Changes

- Barbara Brooks, Assistant Manager, General Accounting (promotion)
- Sheryta Edwards, Accountant II, Tax Compliance
- Melissa Manasco, Account Coordinator, General Accounting
- Jennifer Perry, Director of Revenue & Bursar
- Christie Ransom, Assistant Manager, Accounts Payable (promotion)
- Kevin White, Senior Payroll Specialist

Announcements & Deadlines

Financial Aid

- Andrew Linn, Executive Director, Student Financial Aid (promotion)

Announcements & Deadlines

HR Business Partner Area Assignments

- LaToya Andrews
 - College of Education, College of Professional & Liberal Studies, Educational Initiatives, Graduate School, Information Technology Services, School of Public Health
- Haneefah Broome
 - Business & Finance (including Physical Plant, Housing & Residence Life, & Police Services), Helen Hardin Honors College, School of Communication Sciences & Disorders
- Ryan Hall
 - College of Arts & Sciences, Enrollment Services, Kemmons Wilson School of Hospitality & Resort Management, Lambuth Campus, Loewenberg College of Nursing, Provost's Office, Registrar's Office, University Libraries
- Stacey Henderson
 - Cecil C. Humphreys School of Law, College of Communication & Fine Arts, Fogelman College of Business & Economics, President's Units, Research & Innovation
- Chebrew Leonard
 - College of Health Sciences (including Rec Center), Dean of Students, External Relations, Herff College of Engineering, Student Academic Success
- Maria Acosta
 - Advancement (interim)
- Chaylin Garrett
 - Athletics (interim)

Announcements & Deadlines

- Remember to review the University's current job openings at workforum.memphis.edu.
- Follow the Division of Business & Finance on Twitter at [@uofmemphisbf](https://twitter.com/uofmemphisbf)!
- Subscribe to our WorkforUM Twitter feed at [@umemphisjobs](https://twitter.com/umemphisjobs)!
- Follow us on Instagram! [@uofmhr](https://www.instagram.com/uofmhr)

Announcements & Deadlines

- Student workers and graduate assistants without Social Security Numbers
 - New process
 - [Form letter](#) has been created online for your use to provide these students with documentation regarding your job offer to the Social Security Administration
 - Download the PDF form letter, complete with the student's information, and then print ON OFFICIAL WATERMARKED UNIVERSITY LETTERHEAD ONLY and sign using an INK SIGNATURE
 - Student should then take this signed letter to SSA office and return to HR Data Management with the official SSN application receipt

Announcements & Deadlines

Key Dates: October Budget

- Revenue Projections: Due Friday, September 23, 2022
 - Email with instructions will be sent out Friday, September 16, 2022
 - Financial Planning Office will be available for individual meetings Tuesday, Sep 20th and Wednesday, Sep 21st budget@memphis.edu
- Expenditure Projections: Due Tuesday, September 27, 2022
 - Email with instructions will be sent out Monday, September 19, 2022
 - Departments can process Online Budget Documents till Tuesday, October 4, 2022
- Position Budget Revisions: Due Monday, September 26, 2022
 - Current & Base Budget Revisions to be included in Fall Budget
- Capital/R&R/Facility Projects: Due Tuesday, September 27, 2022

Announcements & Deadlines

October Budget

- Expenditure online BRs:
 - Please remember that any online budget revisions must be entered and moved through the approval queues by the end of day, on Tuesday, October 4, 2022 to be included in the October budget submission.
- Divisional Carryforward balances:
 - The FY21 carry forward funds have been posted into Banner Finance to account code 74000 - operating. It is important to remember to shift carryforward funds, as well as any unallocated funds to the budget pools/account codes where the funds will be spent – be sure and incorporate spring semester spending as well.
 - The “best practice” is to look at historical spending as compared to both your base and current year budgets (which includes carryforward funds) and submit budget revisions to properly align your budget. Base alignment will greatly reduce the number of budget revisions that will be required in the future.

Announcements & Deadlines

Fall Budget: Benefit Fringe Rate

- Benefits FY23 Fringe Rate
 - 35.86% Salaried Employees
 - 52.83% Hourly Employees
 - 7.44% Temp Employees – No Insurance
 - 14.40% Temp Employees – With Insurance
 - 1.20% Student / GA

Announcements & Deadlines

- New [Softdocs version](#) of Volunteer Registration Form
- <https://www.memphis.edu/hr/volunteers.php>

Announcements & Deadlines

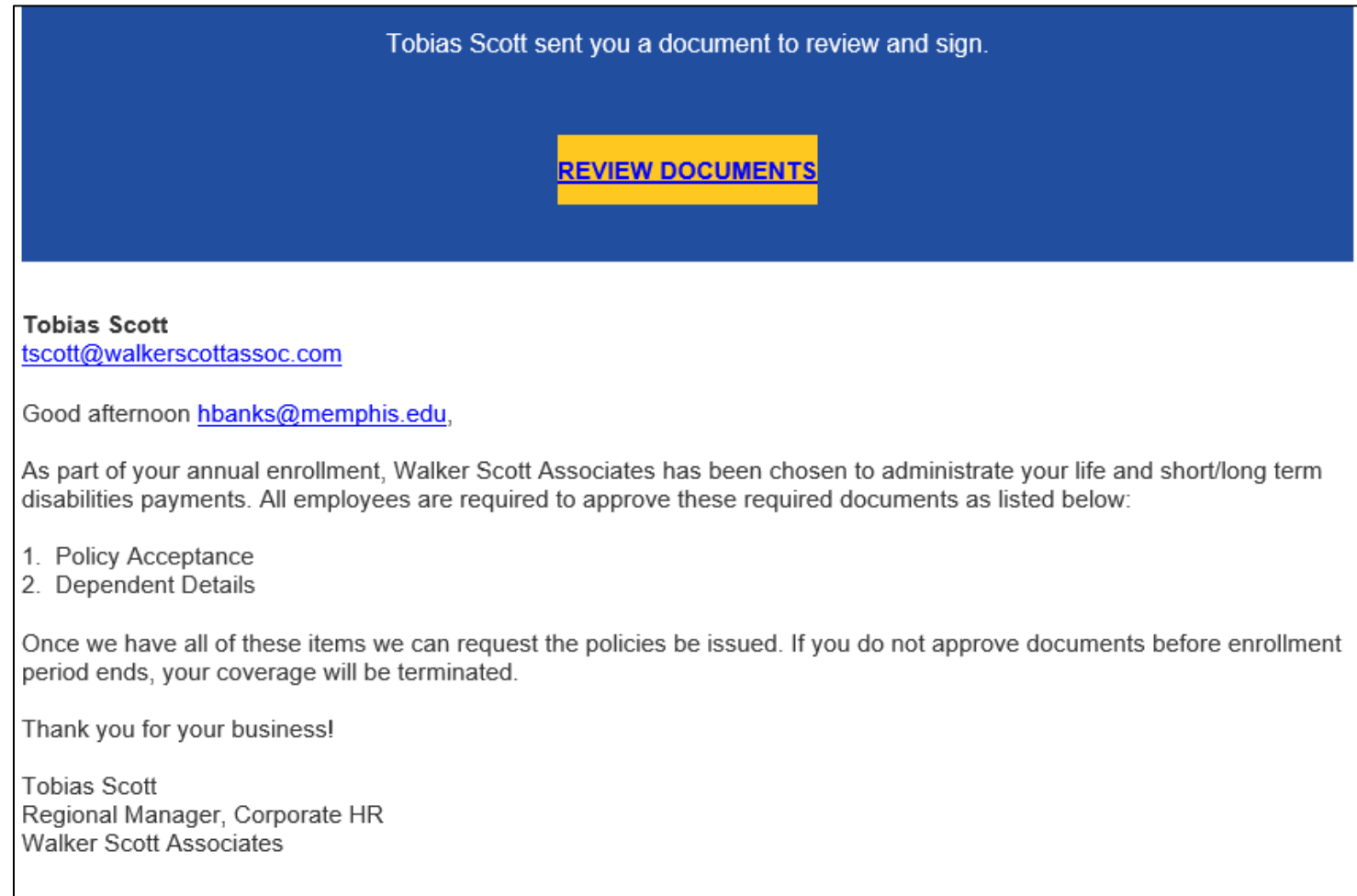
- Voting Leave Reminder
- memphis.edu/hr/voting.php

Announcements & Deadlines

- REMINDER: Student worker and temporary employees are now appointed via a single position number University-wide
- You should no longer be submitting New Position request forms (FP-02s) for these position types

Announcements & Deadlines

- Remember to be vigilant about phishing attempts.
- Open Enrollment has not started and any Docusign-style documents like the one pictured here are often fake.
- Report as Phish Alert to IT via the button in Outlook or forward to abuse@memphis.edu.



Announcements & Deadlines

Separation & Clearance

- Please remember to immediately complete online separation notices for any employee you have that are departing the University!
- Not doing so places the University at risk because the employee would still have access and can lead to an audit finding.
- Keep in mind it is HR's practice to process 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

- Chrome River is live!
- memphis.edu/travel
- Used for travel and other reimbursements to University faculty & staff
- Recording of online training is available
- Questions? sharedservices@memphis.edu

Announcements & Deadlines

- Accounting Basics Training
 - Register in [Learning Curve](#)
 - October 31 at 10am

Announcements & Deadlines

- The Accounts Payable, General Accounting and Payroll departments shared email groups will be converted to a distribution email group on Friday, September 23rd between 3:00 to 5:00 pm. During that time, any email messages sent to the below inboxes will not be delivered and will bounce back to the sender as undeliverable.
 - accountspayable@memphis.edu
 - fupload@memphis.edu
 - payroll@memphis.edu

Announcements & Deadlines

- Career Milestone Awards
Tuesday, November 15
University Center Ballroom, 10 am
- [Recipients List](#)

Announcements & Deadlines

Form I-9 Information:

- Appointments not needed during regular business hours.
- Visit 143 Administration Building, M-F 8-4:30.
- Questions? i9@memphis.edu

Announcements & Deadlines

Next WorkforUM training:

- October 26, 1:30pm
- Sign up in [Learning Curve](#)!


Announcements & Deadlines

Values in Action (VIA)

- Workshop series where employees learn how to incorporate the University's Values in their daily actions. Sessions will be hosted on Zoom at midday, so you can watch and learn while enjoying your lunch.
- Latest sessions are available directly at <https://www.memphis.edu/hr/via.php>
- Next session:
Tiger Banking | Financial Accountability
September 23 | 12-1pm

VALUES IN ACTION

WORKSHOP 2022




Registration at [Memphis.edu/hr/via](https://www.memphis.edu/hr/via.php)

SEPT. 23 | NOON-1 PM
ACCOUNTABILITY

Make your money work for you with information from an expert. Hayley St. Onge, Vice President of the Tiger Banking Center will be joining us for this webinar from our on campus branch of First South Financial to talk about:

- Prioritizing Purchases
- Budgeting
- Spending Plans
- Financial Accountability



Announcements & Deadlines

- Auxiliary Services Food Pantry Drive
- Box will be located outside of Tiger Copy & Graphics
- Rawlins Service Court
- Thru October 31, 2022





THANK YOU FOR ATTENDING!

Next Meeting

October 18, 2022 @ 2:30pm

Meetings: memphis.edu/focuszoom

Website: memphis.edu/focus