

Welcome to Focus on Finance!

March 15, 2018



Agenda

- Student Employment Summer/Fall 2018 Jessica Howell
- Gift Cards LaTisha Williams
- TigerBuy New Supplier/Vendor Registration LaJocelyn Walker
- Audit Notes Vicki Deaton
- Tips & Tricks Encumbrance Review Deborah Keeney
- What's New? Who Knew? What's Due?



Student Employment Summer & Fall 2018



Jessica Howell - Coordinator Student Financial Aid



 Students do not need to be enrolled for the Summer to work under Regular Student Employment (RSE); however, they need to have maintained at least half-time status for Spring 2018 and be enrolled again at least half-time for the upcoming Fall semester.

- Please do NOT submit paperwork if student is not yet enrolled for the Fall 2018.
- Registration begins April 2nd for Summer & Fall 2018



- Notify student that FICA taxes will be withheld if they are not enrolled at least half-time in the Summer.
- The student is responsible for obtaining a Summer Parking hangtag to avoid parking tickets.



- If employing for both the Summer and Fall semesters under RSE, complete ONE RSE Payroll Action Form with employment dates inclusive of 5/12/2018 through 12/21/2018.
- There is no Federal Work Study (FWS) available for Summer. If working under the RSE program for the Summer only, list employment dates from 5/12/2018 through 8/17/2018.
- If working under the RSE program in the Summer, then switching to FWS for Fall, fill out a FWS Payroll Action Form to pick up from 8/18/2018 through 12/21/2018.



- If the student is **graduating at the end of the Summer** semester, they have to be enrolled in at least half-time in the Summer. Their employment dates will be from **5/12/2018** through **8/17/2018**.
- If the student cannot meet enrollment requirement, please contact our Human Resources Department at (901) 678-3573 to hire student as a Temporary Employee.



Fall 2018 Process

- If it is a new student starting in the Fall (i.e., never enrolled here prior to Fall 2018), the first day the student can work is Monday, 8/27/2018 and can go through 12/21/2018. These would be incoming freshmen, new graduate, transfer students, etc.
- We will begin posting FWS awards for 2018-2019 once Spring 2018 grades are posted.
- Grades will be posted in late May or early June.



Enrollment Confirmation

- Students that are:
 - Education majors
 - Nursing majors
 - Studying Abroad

Will need a letter from the department stating they will be enrolled in **at least** half-time (6 hours) for the respective semester.



Enrollment Confirmation

- The letter will need to have the following information.
 - Name
 - U-ID number
 - Number of hours for the Summer or Fall 2018 semester
 - Attach letter to the Payroll Action Form



Student Employment Updates

 The 2018 W-4 can be found on the Student Employment website

 http://www.memphis.edu/financialaid/student_employment/ seforms.php



Student Employment Updates

• I-9 Refreshers

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Student Employment Updates

I-9 Refreshers

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Questions





Gift Cards



LaTisha Williams – Asst. Mgr., General Accounting Accounting Office



Gift Card - Taxable Income

- According to the rules of the Internal Revenue Service (IRS), gift cards are considered taxable income regardless of the amount.
 - Employees There is no de Minimis fringe benefit amount relating to gift cards. All gift cards are considered compensation and subject to tax withholding.
 - Non-Employees The value of each gift card received is included as 1099-MISC compensation.



Gift Card - Purpose

- Gift cards are distributed for University approved business purposes only.
 - Research Participant Payments (*Most common*)
 - Student Awards (Occasionally We recommend paying via Request for Payment to Individual or Contractor.)
 - Honorarium for Guest (Occasionally We recommend paying individual via Request for Payment to Individual or Contractor.)
 - Employee Awards (*Prohibited* Should be completed as Extra Compensation and paid via University Payroll.)



Gift Card - Control

- Gift Cards should be kept under lock and key at all times to ensure proper physical security and to protect from theft and loss.
- Access to the gift cards and keys to the lock areas should be limited to the individual(s) responsible for safekeeping of the gift cards.



Research Participant Payments

- A Request for Research Participant Payment form should be completed for each participant. Ensure participant signs at the bottom of the form acknowledging receipt of payment. http://www.memphis.edu/accounting/pdf/accto7.pdf
- A Research Participant Disbursement Log is also an acceptable alternative.
 - If a non-disclosure research study, assign a unique subject number to each participant.



New Vendors

US Citizens

- Completed W-9 Form.
- Copy of State Issued ID or Driver's License.
- Payment Processing Time: Up to 7 business days.

Non-US Citizens

- W-8BEN Certificate of Foreign Status of Beneficial Owner for US Tax Withholding and Reporting.
- Copy of Passport (photo page, as well as any/all US entry and exit stamps).
- Payment Processing Time: Up to 15 business days.



Reimbursement Process

- Supply Advance
 - Proof of Purchase of Gift Card. (Receipt)
 - Available for Grant related research studies.
 - Submit Request for Supply Advance Reconciliation.
 - Attach Request for Research Participant Payment form or Disbursement Log.
 - W-9 or W8-BEN, if applicable.
 - Settlement required at the end of research study or by June 25th.
- Cash Reimbursement Form
 - Proof of Purchase of Gift Card. (Receipt)
 - Attach Request for Research Participant Payment form or Disbursement Log.
 - W-9 or W8-BEN, if applicable.

Unused gift cards are not reimbursable.



Resources

- Accounting Forms:
 - http://www.memphis.edu/bf/forms/finance.php

- Accounting Contact:
 - accountspayble@memphis.edu
 - -(901)678-2271



Questions





TigerBuy New Supplier/Vendor Registration



LaJocelyn Walker, Procurement Assistant Procurement & Contract Services



Procurement and Contract Services

How to do Business with the University of Memphis

The University maintains a list of registered vendors which shows the types or classes of materials, supplies, equipment or services which the person, firm or corporation is able to furnish to the University. Tigerbuy is the University's eProcurement system. To become a registered vendor in Tigerbuy, register here. Read more about Tigerbuy in our welcome letter (PDF).

To receive bid opportunities from the University of Memphis, register here. Failure to register may result in missed bid opportunities. Vendors that have been debarred, suspended, proposed for debarment, or declared ineligible for doing business with the Federal Government are ineligible to do business with the University of Memphis.

Registration does not guarantee that all bidders will receive Requests for Quotations (RFQ) or Requests for Proposals (RFP). All bid opportunities are advertised through Tigerbuy and the University's Bid Calendar. Vendors may request specific bid opportunities by e-mail at ebid@memphis.edu.

Vendor Information

- <u>Tigerbuy Welcome Letter</u> (PDF)
- <u>Diversity Business Program</u>
- <u>UofM Minimum General Bid Conditions</u> (PDF)
- Vendor's Right to Protest
- Protest Bond (PDF)
- <u>Purchase Order Terms and Conditions</u> (PDF)
- Service and Software Accessibility Standards
- Business Information The University of Memphis Letter of Credit
- Accounts Payable (Whom to Call to Check on Payments)
- Vendor Evaluation



Documentation

When applicable, the following document links must be completed to allow vendor set-up to be completed.

- Minority/Ethnicity Form: <u>https://bf.memphis.edu/forms/procurement/busow</u> ner.html
- W-9 Form: https://www.irs.gov/pub/irs-pdf/fw9.pdf
 W-8BENE Form: https://www.irs.gov/pub/irs-pdf/fw8bene.pdf
- W-8BENE and W-9 forms are also available on the Accounting Forms Page http://www.memphis.edu/bf/forms/finance.php



Minority/Ethnicity Form Demystified

General Classifications

- <u>Disabled</u>: Refers to the person(s) or entity having at least a 51 percent controlling interest in the firm
- **Government Entity**: Refers to the person(s) or entity having at least a 51 percent controlling interest in the firm.
- <u>African American</u>: Refers to the person(s) or entity having at least a 51 percent controlling interest in the firm. African American (a person having origins in any of the black racial groups of Africa).
- <u>Hispanic American</u>: Refers to the person(s) or entity having at least a 51 percent controlling interest in the firm. Hispanic (a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race).
- <u>Majority Owned</u>: If your organization is not minority-owned or women-owned, it will be majority-owned. Refers to the person(s) or entity having at least a 51 percent controlling interest in the firm.
- <u>Native American</u>: Refers to the person(s) or entity having at least a 51 percent controlling interest in the firm. Native American (a person having origins in any of the original peoples of North America).



Minority/Ethnicity Form Demystified

General Classifications Continued

- Non-Profit: Refers to the person(s) or entity having at least a 51 percent controlling interest in the firm.
- **Small Owned**: Refers to the person(s) or entity having at least a 51 percent controlling interest in the firm.
- <u>Women Owned</u>: Refers to the person(s) or entity having at least a 51 percent controlling interest in the firm.
- <u>Asian American</u>: Refers to the person(s) or entity having at least a 51 percent controlling interest in the firm. Asian American (a person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands).
- Service-Disabled Veteran Business Enterprise: Tennessee Service-Disabled Veteran owned means any person who served honorably on active duty in the Armed Forces of the United States with at least a twenty percent (20%) disability that is service-connected meaning that such disability was incurred or aggravated in the line of duty in the active military, naval or air service.



Troubleshooting

Why does the Minority/Ethnicity Form have to be completed?

- In order to comply with reporting regulations as required by the State of Tennessee and the United States federal income tax laws, it is necessary that the requested information listed on the form be provided prior to the issuance of any University contract.
 - Individual Requirements
 - Minority/Ethnicity Code
 - Native American, Hispanic American, African-American, Asian American
 - Business Requirements
 - Type of business ownership filed on business taxes
 - Governmental Agency, Agency of the State, Non-Profit, Majority, Minority,
 Women Owned, Small Owned, Service-Disabled Veteran



Frequent Questions/Concerns

- ☐ After application, how long will it take to process the Vendor Registration?
- ➤ Upon receipt of ALL documentation, the goal is to process applications within 3-5 business days.
- Documentation not included with Vendor Registrations/Updates causes delays in processing until all information has been received.
- ☐ Omitting EIN, SSN, or Other on application sends Vendor Application into DRAFT.
- ➤ This location holds all incomplete documents for 14 days before automated system deletion.
- ➤ During this period, system e-mail is forwarded to application preparer by Procurement Assistant in SciQuest to inform vendor of the need to complete new vendor application(s)



Email: purchasing@memphis.edu

Phone: 901-678-2265

Website: http://www.memphis.edu/procurement/tigerbuy/

Welcome to Tigerbuy, our online marketplace for eProcurement

Tigerbuy Welcome Letter T

Tigerbuy Training Classes & Registration



NEW VENDORS/SUPPLIERS

ENTER HERE

NEGISTERED VENDORS/SUPPLIERS

User Name:	Forgot your Password?
Password:	
Login	



Questions





Audit Notes



Vicki Deaton, Chief Audit Executive



Fixed Asset Audit

- One of our areas of audit is Fixed Assets.
- An audit of Fixed Assets is included in all departmental audits.
- An audit of Fixed Assets is sometimes performed as a separate audit.

Organizations are currently performing their own Fixed Asset Audits for the annual inventory confirmation completion.



Audit Objectives

- 1. To ensure that Fixed Assets physically exist and that Fixed Asset records are complete and accurate.
- 2. To determine compliance with UM1772 Equipment Inventory and UM1777 Lost or Stolen University Property.



Policy Definitions

- Capital Equipment: Single equipment items (movable, repairable, durable, and unique) costing \$5,000 or more
- ➤ Sensitive Minor Equipment: Single equipment items (movable, repairable, durable, and unique) costing between \$1,500 and \$5,000 and that are vulnerable to theft
- ➤ Workflow System: Centralized Fixed Asset System to track all Capital Equipment and Sensitive Minor Equipment



Policy Requirements

- Capital Equipment and Sensitive Minor Equipment must be tagged with a p-tag (decal) and tracked in the Workflow System to ensure accurate location, identifying information, transfers and other changes, and deletions.
- ➤ A Request for Off-Campus Use of Equipment form must be completed for any other usage or removal from campus, including release to a faculty's or employee's custody.



Policy Requirements

- ➤ An annual inventory confirmation must be performed by those responsible for the Fixed Assets. (Annual inventory confirmations must be completed, certified by the Equipment Representative and the Financial Manager, and returned to the Accounting Office by March 30, 2018.)
- The department must file the Report of Lost or Stolen Property with Police Services whenever University property is lost, stolen, or missing, whether or not the item is in the Workflow System.



Auditing Fixed Assets

- 1. Select a department or organization for audit.
- 2. Obtain the Fixed Asset list for the department or organization.
- 3. Select a sample of Fixed Assets and physically verify each selected asset with assistance from the designated Equipment Representative.
- 4. Verify the accuracy of the asset record (description, make, model, SN, and location).



Auditing Fixed Assets

- 5. Review supply transactions for the last few years to identify Capital Equipment or Sensitive Minor Equipment that was not recorded in the Workflow System and tagged.
- 6. Review the last annual inventory confirmation submitted to Accounting and note the date completed, authorized signatures, and accuracy of the asset records.
- 7. Ensure that Reports of Lost or Stolen Property are completed and filed as necessary.



Audit Issues Identified

While auditing Fixed Assets in various departments during FY2017, we found:

- 1. Some Fixed Assets could not be located.
- 2. Many Fixed Assets were not in the location noted in the Workflow System asset record.
- 3. Many Fixed Asset records are not accurate in the Workflow System (description, make, model, SN).



Audit Issues Identified

- 4. Some Fixed Assets were off campus, but no Request for Off-Campus Use of Equipment form was completed.
- 5. Some Fixed Assets were coded as supplies and did not get capitalized promptly.
- 6. Some annual inventory confirmations were not completed accurately or in a timely manner.



Audit Action Plans Developed

Departmental management agreed to complete the following steps to address these audit issues:

- ✓ All Capital Equipment and Sensitive Minor Equipment will be entered in the Workflow System and tagged.
- ✓ The Equipment Representative will physically verify all Fixed Assets.
- ✓ Fixed Asset records will be updated in the Workflow System.
- ✓ Request for Off-Campus Use of Equipment forms will be completed as needed.
- Reports of Lost or Stolen Property will be completed for all Fixed Assets that cannot be located.
- ✓ The annual inventory confirmation will be completed accurately and timely.



Questions





Tips & Tricks

Encumbrance Review



Deborah Keeney, Associate Director Budget Financial Planning



Encumbrance Reports

ePrint Report FGROPNE
Open Encumbrance Report

INB Screen FGIOENC
Organizational Encumbrance List

TigerBuy – Change Order Request



FGROPNE - Open Encumbrance Report

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P0217162 P0224404 P0224849	U00012345 U00123456 U00012345	Rabbit, Roger Meadows, Melissa Rabbit, Roger		DKKEENEY DKKEENEY DKKEENEY		29-AUG-2017 19-DEC-2017 05-JAN-2018	1,500.00 380.00 2,300.00		83.82 380.00 2,300.00
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P. O. NUMBER	VENDOF NUMBER	R / PAYEE NAME		USER ID	BLANKET NUMBER	TRANSACTION DATE	ENCUMBRANCE AMOUNT		REMAINNG BALANCE
P0224104	U00016426	Staples Contract and Com	nmercial Inc	DKKEENEY		13-DEC-2017	182.77		64.79
	TOTALS FOR FU	0	E and G chase Order Ba	lance:				\$	64.79

Total Purchase Order Balance:

Total Open Purchase Order Records: 4



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FGROPNE - Open Encumbrance Report

University of Memphis

Open Encumbrance Report 05-FFB-2018 06:54:10 PM Page Code lookup results DOCUMENT TYPE: Purchase Orders Title Account Individual Out of State Travel 73200 Fund: 110001 Undesignated E and G COAS: U FUND: 110001 ORGN: 243000 ACCT: 73200 PROG: 2000 LOCN: VENDOR / PAYEE P.O. BLANKET TRANSACTION **ENCUMBRANCE** REMAINNG NUMBER NUMBER NAME USER ID NUMBER DATE AMOUNT BALANCE P0217162 U00012345 Rabbit, Roger DKKEENEY 29-AUG-2017 1,500.00 83.82

19-DEC-2017

05-JAN-2018

TOTALS FOR FUND:

U00123456

U00012345

8.9

FGROPNE

P0224404

P0224849

Undesignated E and G

Open Purchase Order Records: 3

Meadows, Melissa

Rabbit, Roger

Purchase Order Balance:

Travel PO's are managed by Accounting Accounts Payable

- a email AccountsPayable@memphis.edu to close out Travel P0217162
- b Travel was scheduled for the 1st week in January, verify Travel Claim has been submitted

DKKEENEY

DKKEENEY

c - No Action at this time due Travel scheduled for 3rd week in February

Note, when you submit the final Travel Claim, write Close PO on form.



380.00

2,300.00

2,763.82

380.00

2,300.00

FGROPNE - Open Encumbrance Report

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TigerBuy PO's are managed by Procurement and Contract Services

d - Determine the status of PO

- 1) The user needs to verify all POs have been receipted, invoices matched and paid in the TigerBuy system
- 2) The user to notify vendor to provide invoice, if needed for payment or credit for return to be processed by Accounts Payable
- 3) The user to complete a TigerBuy Change Order Request: To cancel/close PO (Decrease PO) or To add funds (Increase PO)

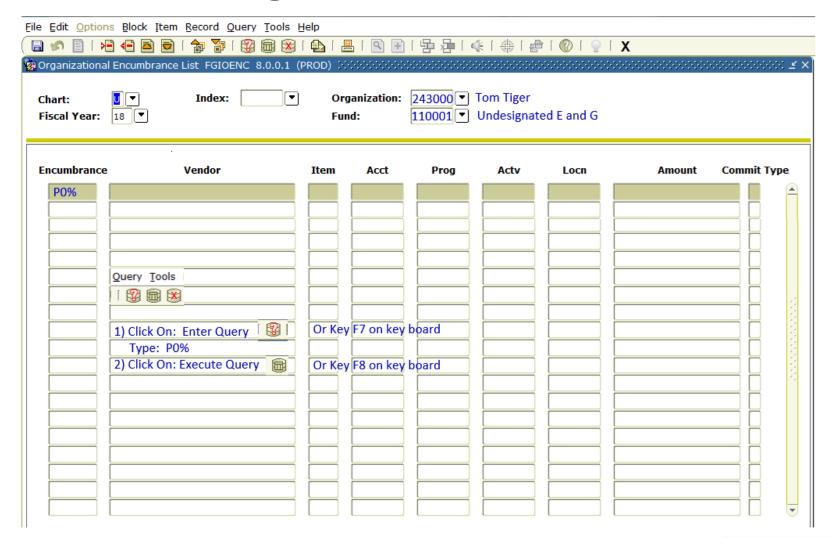


FGIOENC – Organizational Encumbrance List

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P0224104	Staples Contract and Con	nmercial Inc	1	74500	2000			64.79	U	
P0224404	Meadows, Melissa		0	73200	2000			380.00	U	
P0224849	Rabbit, Roger		0	73200	2000			2,300.00	U	
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PR180001			0	61257	2000			13,125.00	U	
PR180001	PR for Payroll		0	61210	2000			369,207.91	U	
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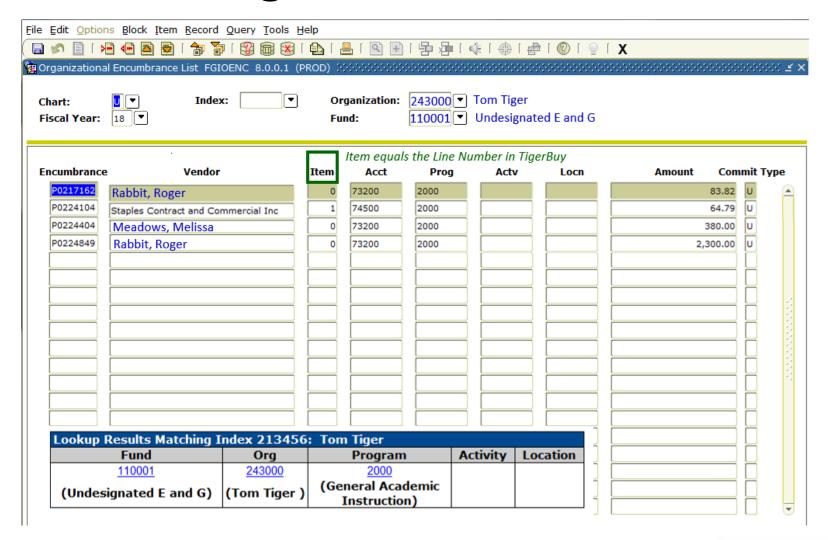


FGIOENC – Organizational Encumbrance List



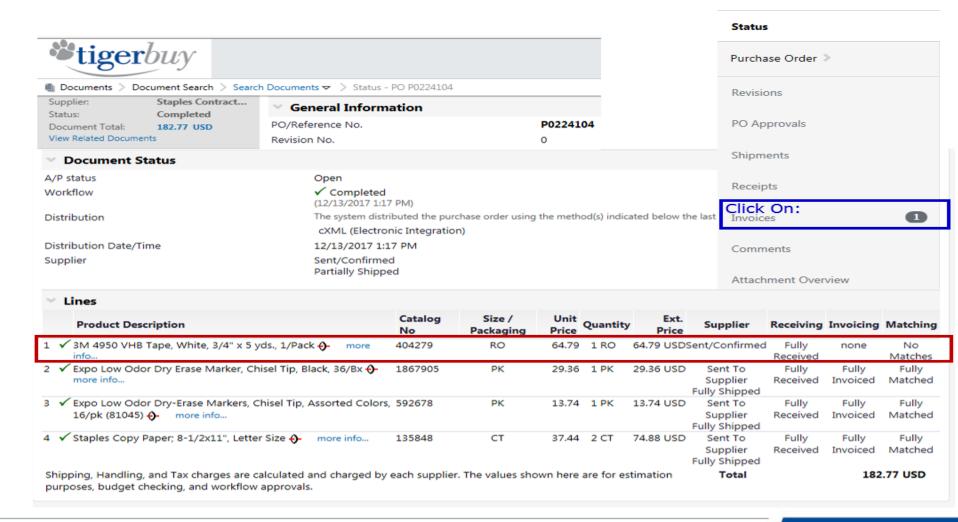


FGIOENC - Organizational Encumbrance List



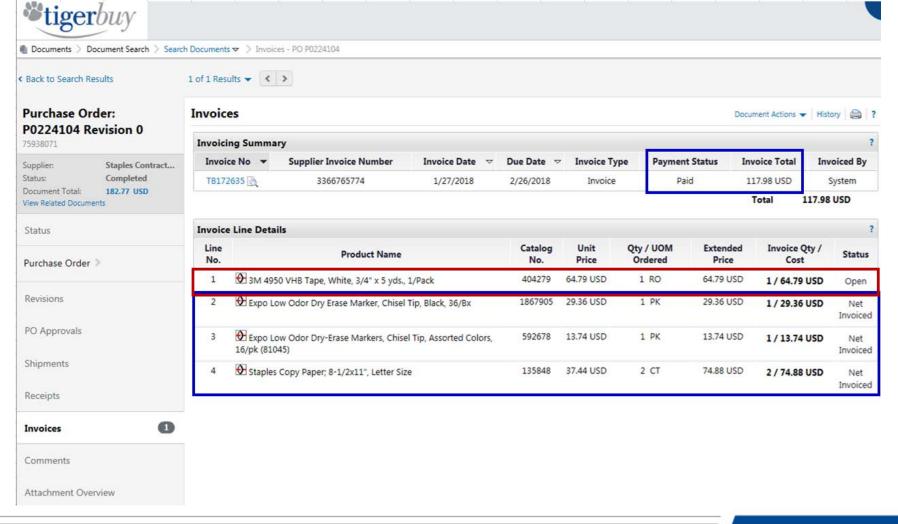


TigerBuy - Document Search PO



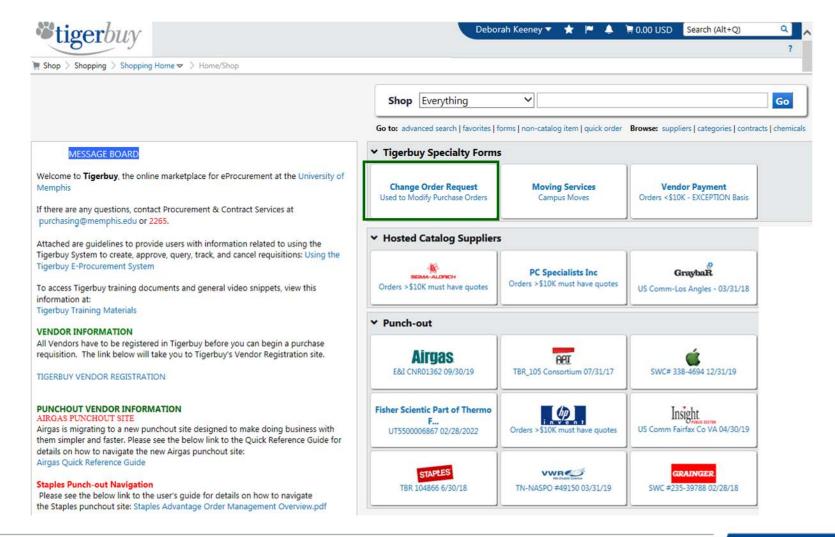


TigerBuy - Invoices



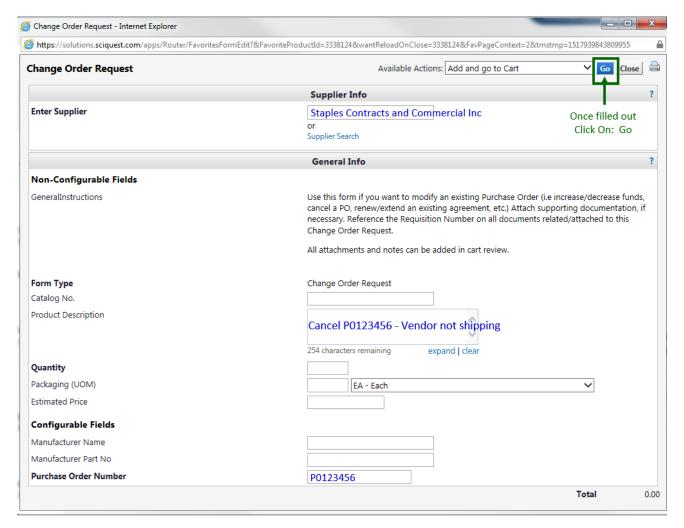


TigerBuy - Change Order Request



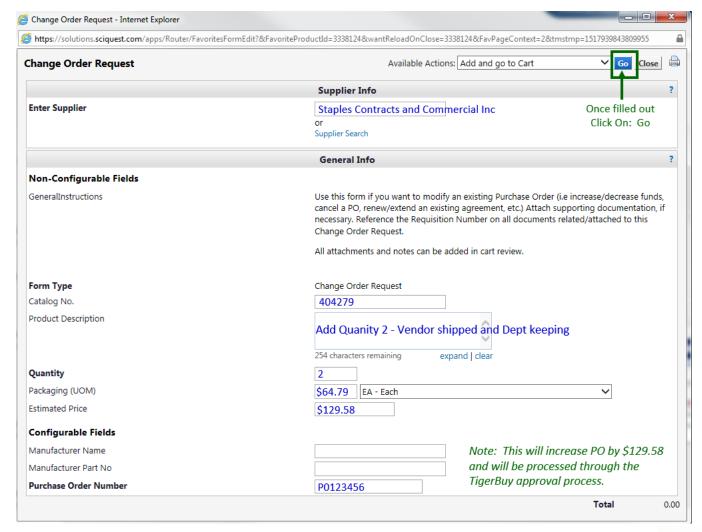


TigerBuy - Change Order Request





TigerBuy – Change Order Request





QUESTIONS?



accounting@memphis.edu 901-678-2271



Who Knew? / What's New? / What's Due?



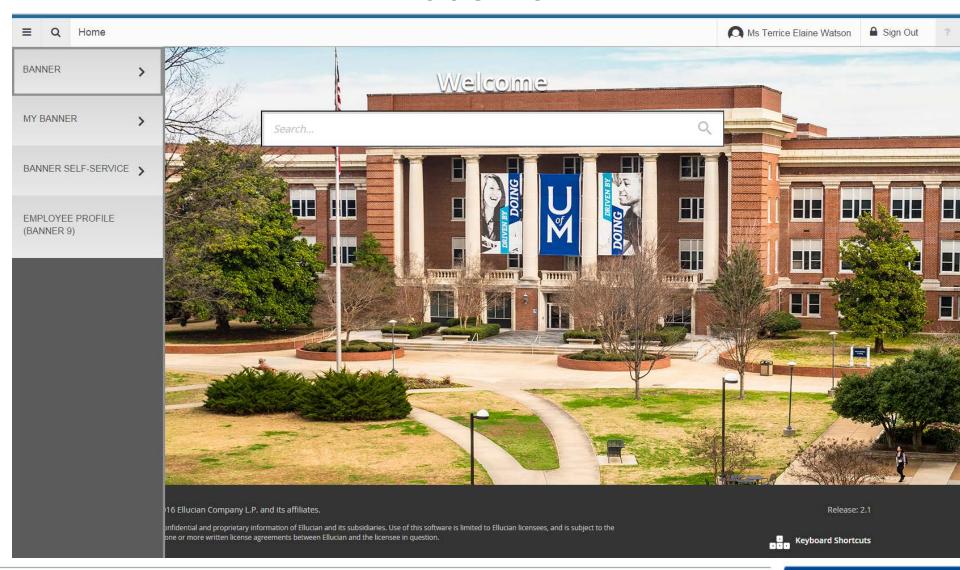


Who Knew?

Workshops	Date				
Fixed Asset Inventory (Finance Workshop)	Tuesday, March 27, 2018				
Admin Bldg Room 178	11:30 AM - 12:30 PM				
Budget Basics	Tuesday, April 03, 2018				
Admin Bldg Room 178	9:30 - 11:00 AM				
Accounting Basics	Thursday, April 05, 2018				
Admin Bldg Room 178	1:30 - 3:00 PM				



What's New?





What's Due?

Activity	Deadline				
Revenue FYBR001 Pages and Budget Revisions	Friday, March 16, 2018				
Inventory Confirmation	Friday, March 30, 2018				
Capital/R&R/Facility Projects	Monday, April 02, 2018				
Expenditure & Position Paper Budget Revisions	Monday, April 02, 2018				
BD4 Online Budget Revisions	Friday, April 06, 2018				



Next Focus on Finance

April 19, 2018 1:30-3:00 PM UC Memphis Room 340

Comments or suggestions?
 Email: bffin@memphis.edu

 Focus on Finance website: http://memphis.edu/focusonfinance

