

## **Welcome to Focus on Finance!**

November 17, 2016



## **Agenda**

- Student Financial Aid What's New?
- Intro to Environmental Health and Safety
- Campus Card Office
- PIP Update
- Education Assistance Programs
- The New Bursar Appeals Process
- What's New? What's Due?



### **Student Financial Aid What's New?**

DebraAnn Brown, Associate Director Financial Aid



### **Student Financial Aid What's New?**

- 2017-2018 FAFSA became available 10/1/2016
- Student (and parents) use their 2015 income tax information; no need to estimate
- Conflicting information identified by U.S. Dept of Education (via FAFSA agency) must be resolved
  - Resolved info could mean student eligible for less aid
  - Unresolved info could hold up student's Spring
     2017 aid and/or terminate current FWS position
- Send student to our office (103 Wilder Tower)



### **Student Financial Aid What's New?**

- 2017-2018 FAFSA information
- Applies ONLY to students (and parents) selected for verification.
- If non-filer, must complete IRS Form 4506-T to request "Verification of Nonfiling" (option #7)
- Takes 10 days for IRS to process
- Student need to submit a COPY with U-ID# list at the top (student should retain original)



## **How Can You Help Us?**

- Talk to student
  - Have you checked your myMemphis account?
  - Did you know you can do your 2017-2018 FAFSA early? It's available now (<a href="https://fafsa.ed.gov">https://fafsa.ed.gov</a>)
  - You need to check myMemphis to make sure you don't have a flag that says "Conflicting Information from Prior Year FAFSA"



### **EHS 101**

## An Introduction to Environmental Health and Safety at the University of Memphis

Ashley Koehler
Occupational Safety Coordinator



## **EHS 101**

- Regulatory Agencies
- Programs, Policies, Procedures
- Services
- Training





## **Regulatory Agencies**

- Occupational Safety and Health Administration (OSHA)
- National Fire Protection Agency (NFPA)
- Environmental Protection Agency (EPA)
- Center for Disease Control (CDC)
- Nuclear Regulatory Commission (NRC)
- Department of Transportation (DOT)



## **Programs, Policies, Procedures**

Required by Regulatory Agencies

http://www.memphis.edu/ehs/





## **Fire Safety**

#### <u>Services</u>

- Fire prevention inspections
- Fire extinguisher service
- Fire drills
- AED service

- Fire extinguisher training
- Storage of flammable & combustible liquids
- Electrical Safety training
- Fire Prevention Plan training





## **Laboratory Safety**



#### <u>Services</u>

- Lab Inspections
  - Chemical safety
  - Biological safety
  - Radiation safety
- Fume hood testing
- Chemical inventory management
- Radiation monitoring

- Hazard Communication
   Right-to-Know training
- Laboratory Health & Safety Seminar
- Bloodborne Pathogens
- Pesticide Safety
- Radiation Worker
   Course





#### **Hazardous Waste**

#### <u>Services</u>

- Hazardous Waste Disposal
  - Chemical Waste
  - Biological Waste
  - Radioactive Waste

- Hazardous Waste
   Awareness Training
- Hazardous Material Transportation Training
- Stormwater Pollution
   Program Training





## **General Safety**

#### **Services**

- Accident Investigations
- Respiratory Fit Testing
- Industrial Hygiene Testing
- Job Safety Analyses
- Safety Inspections

- Accident Prevention
   Signs & Tags
- Emergency Action Plan
- Job Hazard Analysis
- Ergonomics
- Violence in the Workplace





## **General Safety**

#### **More Training**

- Ladder Safety
- Personal Protective Equipment
- Compressed Gas Safety
- Respirator Safety
- Hearing Protection Plan
- Confined Spaces
- Powered Platforms

- Control of Hazardous Energy
- Fall Protection
- Powered Industrial Trucks
- Scaffold Safety
- Chainsaw Safety
- Welding Safety



## **Safety Responsibility**

#### The University

- Assess the workplace for hazards
- Ensure workers are protected
- Comply with regulatory agency standards

#### You

- Know your rights
- Learn and recognize hazards
- Report hazardous situations
- Comply with safety policies



## **Know your Rights!**

You have the right to...

- A safe and healthful workplace
- Know about hazardous chemicals
- Access information about injuries and illnesses in your workplace
- Complain or request hazard correction from the University
- Receive safety training
- File a complaint with OSHA
- Exercise these rights without fear of punishment



## **Recognizing Hazards**

- One of the best things you can do is know how to recognize some basic hazards
- Hazards vary based on what you do during your job activities





## **Questions?**

# Ashley Koehler Occupational Safety Coordinator

213 Browning Hall 901-678-2740 rkoehler@memphis.edu



## **Campus Card Office**

The Campus Card has been redesigned and is now available to those of you who want to trade in your old, outdated card in favor of the lovely new one (see below) at no charge! Your current card will still work fine---a new card is not required. (But who wants to be out-of-date???) A new photo will be made each time you have your Campus Card replaced. Come see us at 115 Wilder Tower, and bring your old card for trade in.









**University Process Improvement Department** 

Colette Williams, Asst. Director



#### **Process Improvement Initiatives for UofM**

- 2010 the University implemented Process Improvement initiatives across campus
- Need to address rapid ERP Banner Implementation
  - Implementation schedules did not allow for process review
  - Initially was formed to review business processes relating to Banner implementation
- Over 300 staff and faculty members have participated on teams to-date
- Successfully implemented over 50 projects



#### **Process Improvement Initiatives for UofM**

- Recommendations come from our campus community
  - Team members are our best advocates
  - All suggestions are reviewed by our governing structure

- All project teams are successful with an improved implemented process
  - Top Executive support is key to our success

PIP Website: www.memphis.edu/processimprovement





## **Governing Structure**



#### **Executive Committee**



- Provost Dr. Karen Weddle-West
- Chief Finance Officer David Zettergren
- Chief Information Officer Robert Jackson
- Chief Operations Officer Bruce Harber
- VP Student Affairs Dr. Jasbir Dhaliwal

#### **Executive Committee Role**



- Provides overall sponsorship, vision and guidance
- Ensures changes are successfully communicated, achieved and measured for progress towards service excellence
- Reviews suggested projects and approves slate of projects to implement
- Meets semi-annually with the PMG co-directors

## **Program Management Group (PMG)**

- PMG Co-Director Dr. Tom Nenon
- PMG Co-Director Sam Cox
- Chief Information Officer Bruce Harber
- Admissions Office Carol Laney
- Business Officers Laticia Jones
- CIO Office Sue Hull-Toye
- Human Resources Maria Alam
- IT Services Reza Chowdhury
- Process Improvement Colette Williams
- Provost Office Jan Brownlee
- Registrar Office Darla Keel



#### **Program Management Group Role**

- Serves as champions of change and support improvement efforts, both large and small
- Work to eliminate project roadblocks within the organization
- Oversight committee for Process Improvement projects
- Construct project scopes to ensure it is well-defined
- Identify team members
- Bi-weekly meetings



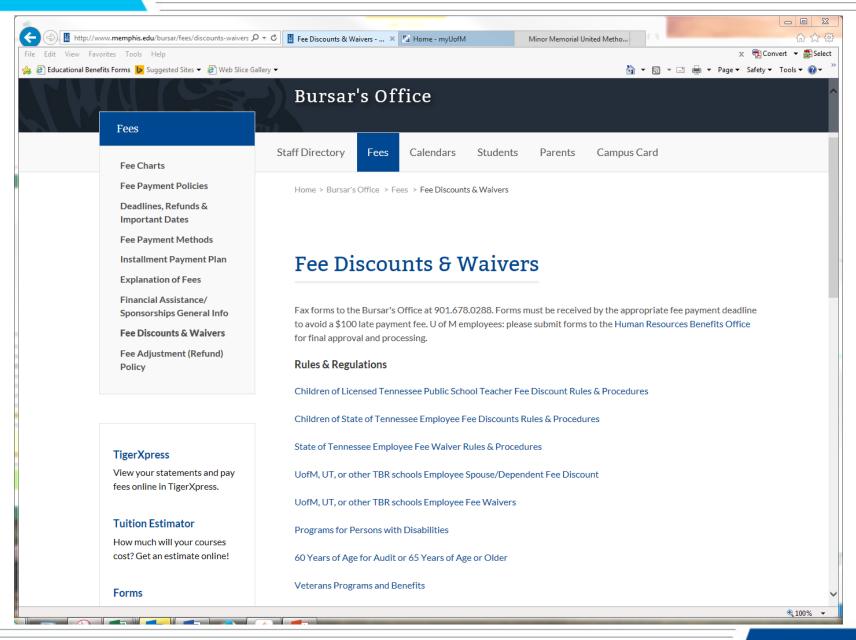
# **Education Assistance Programs Shelanda Gardner, Manager of Student Accounts**



## **Education Assistance Waivers/Discounts**

- Who receives Educational Assistance?
  - University of Memphis employees and their dependents
  - UT Employees and their dependents
  - State Employees and their dependent children
  - State of Tennessee Teacher dependent children
  - State of Tennessee Senior Citizens
  - Persons with Disabilities
     www.Memphis.edu/bursar/fees/discounts-waivers.php

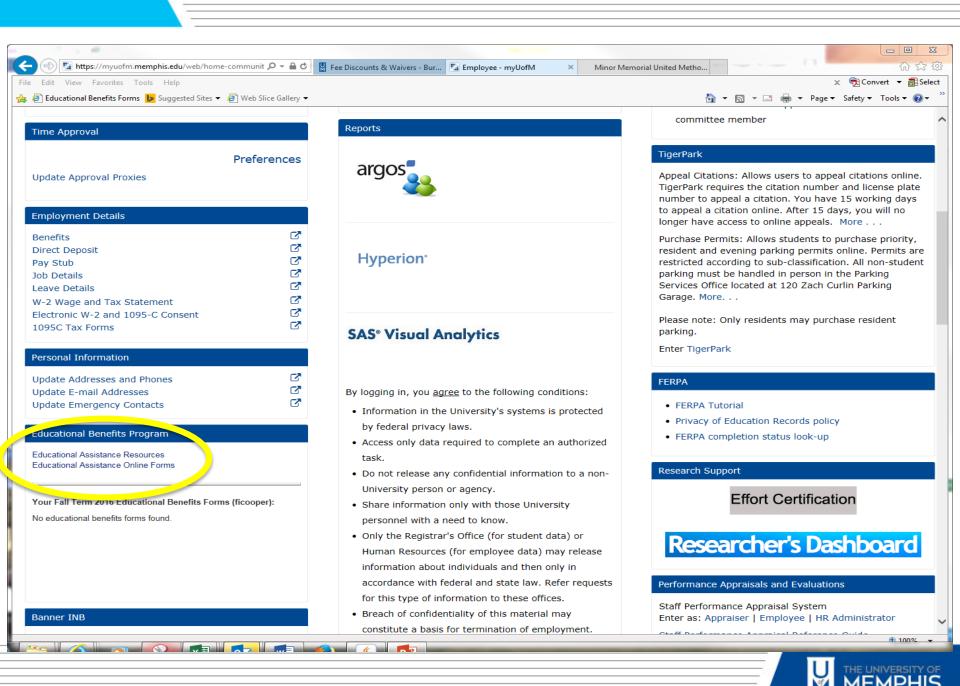


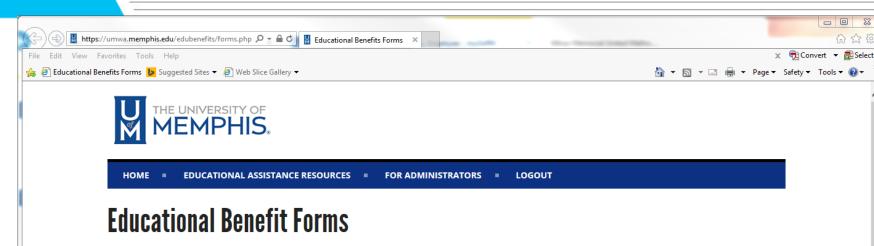




## How do I request my UofM **Employee Education Benefits?** Log into MyMemphis Portal -**Employee page**







Welcome Frances Hogan (U00420117).

You must have registered for class within the official designated period before submitting educational benefit forms.

Fall Term forms are available July 15 - November 30 Spring Term forms are available December 1 - March 31 Summer Term forms are available April 1 - July 14

#### Fee Waiver (formerly PC-191) :: Fall Term 2016

- Enrollment under this program is on a space-available basis only.
- Fee waiver participants may not register for class before Monday, July 25, 2016 to use this benefit.

Staff Scholarship Application for Fee Waiver :: Fall Term 2016

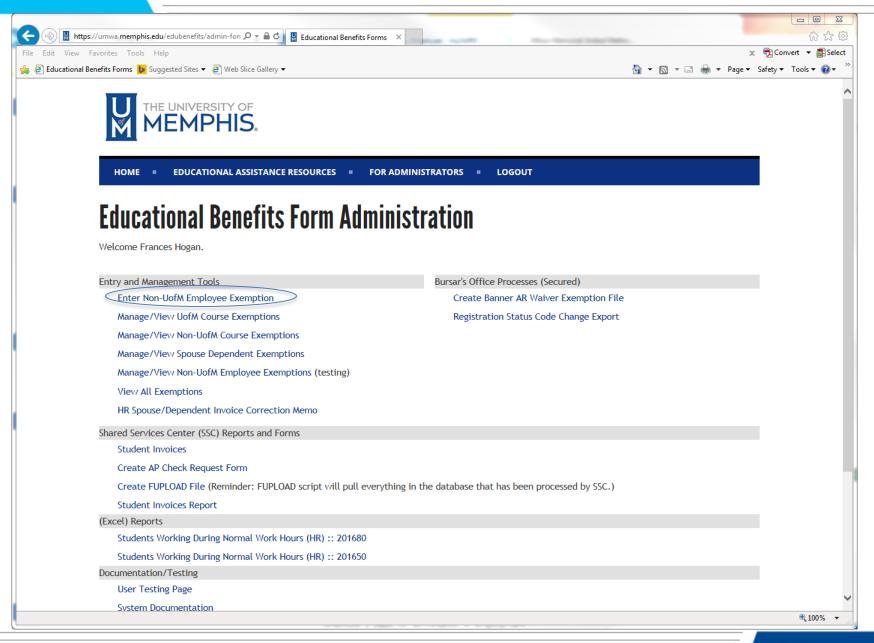
#### Spouse/Dependent Tuition Discount :: Fall Term 2016

- · Employee must submit a spouse dependent form for each institution where dependent is enrolled and taking courses.
- Employee benefits, including education benefits, cannot be paid by a grant, cost-share/Chair or Center of Excellence index. If you are an
  employee paid by one of these types of accounts please contact your department or dean/division-level business officer for assistance with
  obtaining the correct benefit-eligible index.

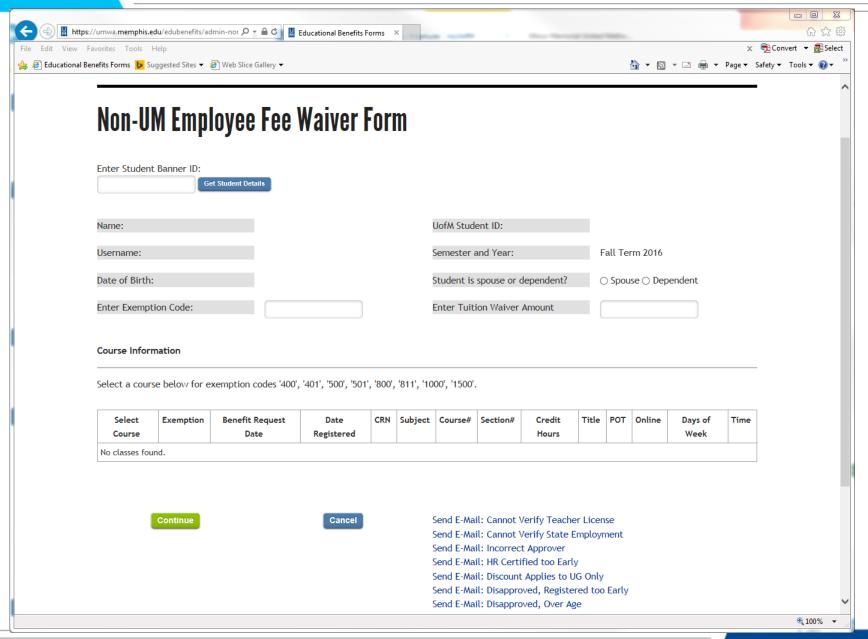
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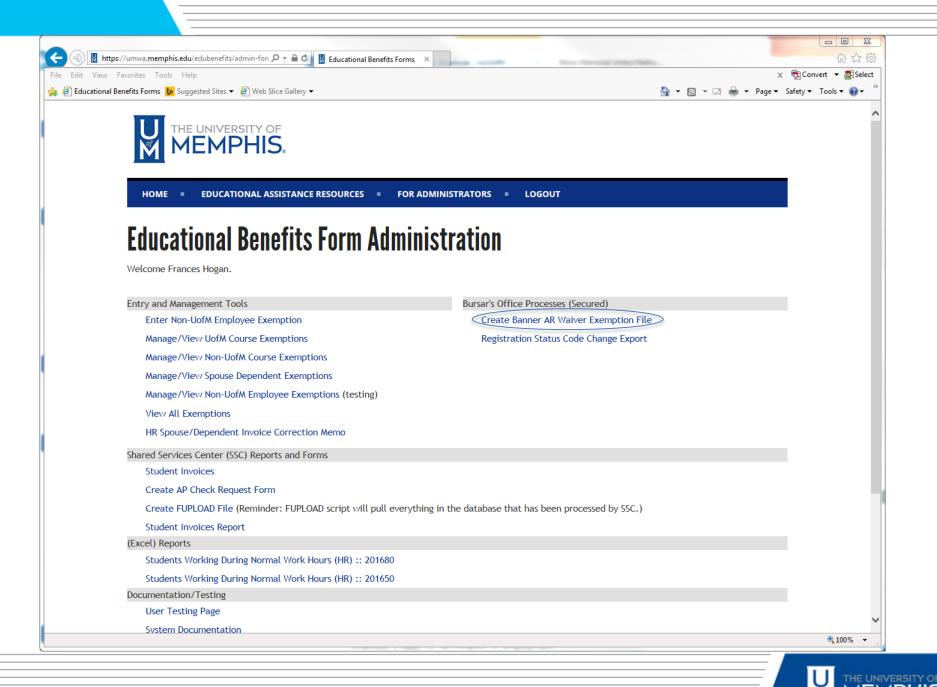


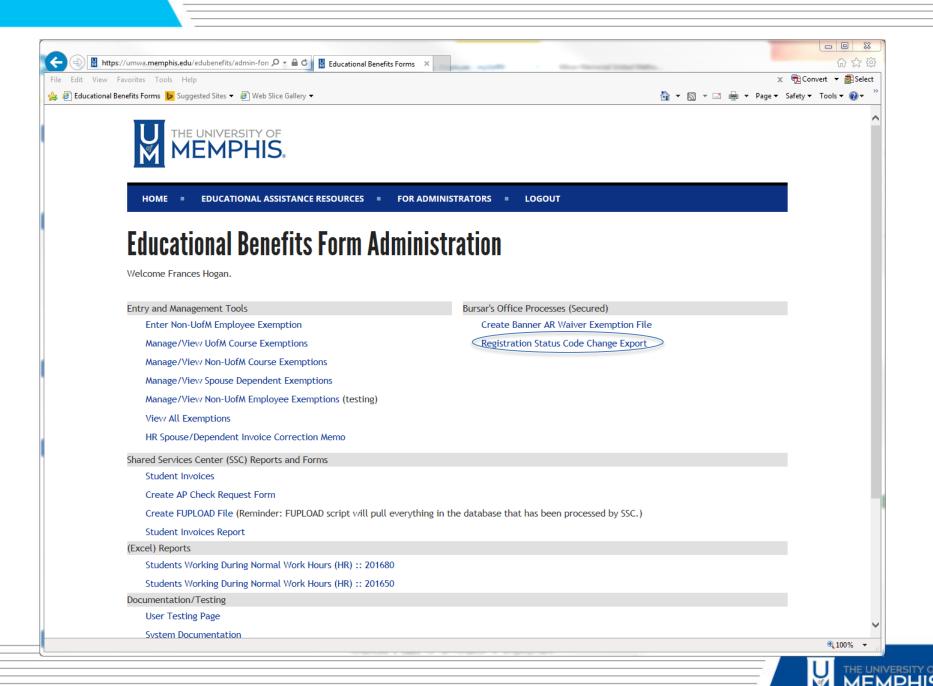












#### **Questions, comments?**

Email <u>HRbenefits@memphis.edu</u> or <u>Bursar\_ar@Memphis.edu</u> with questions!



# **The New Bursar Appeals Process**

Presented by The Bursar's Appeals Staff



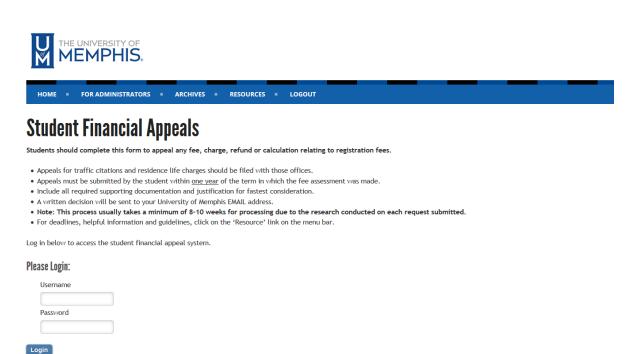
# **Student Financial Appeals**

- 400-500 Appeals/year
- Old form 2 hand written pages plus documentation
- No easy way to track where an appeal was





The Student will log in using the U of M credentials so that we may automatically collect information on the student.



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#### **Student Financial Appeal**

Welcome Henry Robbins (U00003023).

Submit an Appeal

Click here for the student financial appeal form

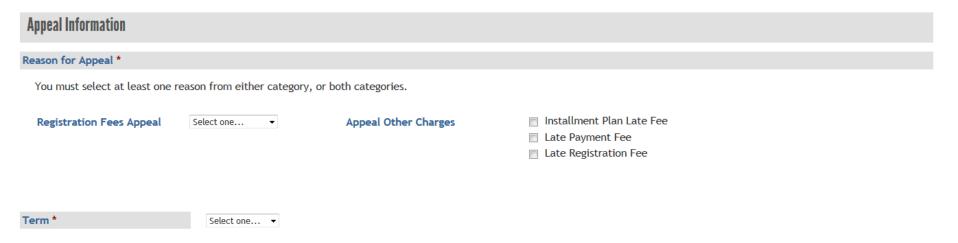
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HOME = FOR ADMINI	STRATORS = ARCHIVES =	RESOURCES - LOGOUT			
Student Finan	cial Appeal				
Student Name	Henry Robbins	Student UUID	hzrobbns	Banner UID	U00003023
Student Information					
Address *				Apt/Unit	
City *		State *	Select one ▼	Zip Code *	





# Students are able to appeal for the following reasons:

- Advising
- Death in the Family
- Employer Conflict
- Medical
- Military

# Students may also appeal certain late fees through our office:

- Installment Late Fee
- Late Registration Fee
- Late Payment Fee

Students are only able to appeal fees that occur within the past year.



Select the courses below you are appealing.

Select Course	CRN	Subject	Course#	Section#	Credit Hours	Title	Online	Days of Week	Time	Drop/Withdrawal Date	Refund %
	20487	MGMT	3510	M51	3	Business Communications	Yes			Not applicable.	Not applicable.
	21103	ACCT	1010	R50	3	Principles of Accounting I	No			Not applicable.	Not applicable.

Justification (limit to 1500 characters) *			
Attach Supporting Documents	Browse No file selected.	Your Documentation	No documents uploaded.

#### <u>Improvements</u>

- Pulls the course schedule for the term selected so the Student may select the course that fees are being contested
- Allows for typing of Justification with a character limit to ensure the student relays what happened in a precise manner
- Allows for supporting documentation to be electronically uploaded



Download the <u>Health Verification Form</u> and have your healthcare provider complete the form. The completed form must be submitted using the *Attach Supporting Documents* section below.

Student Authorization: I certify the above information is correct and that I am requesting the Bursar's Office to review my appeal for approval. I have read and understand the policy and guidelines. I understand that any falsification of the information or misrepresentation of facts will result in my appeal being denied. By clicking Submit below, I am acknowledging that this will serve as my electronic signature.

Submit

Save

Cancel

#### **Improvements**

- Highlighted windows with required documentation form links
- Agreement statement with links to the U of M policy and Guidelines on Appeals
- Allows for supporting documentation to be electronically uploaded
- The ability for the student to save their spot so they may be able to collect required documentation





HOME

FOR ADMINISTRATORS

**ARCHIVES** 

RESOURCES

LOGOUT

#### **Student Financial Appeal System**

Your appeal has been submitted. The appeal process will take a minimum of 10 weeks once we have received all required documentation.

#### <u>Improvements</u>

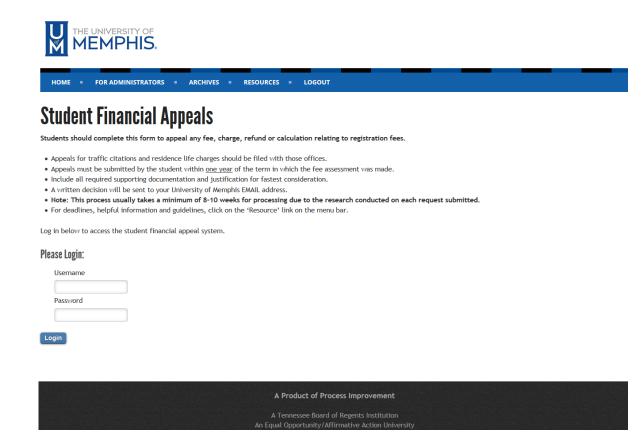
- Immediate electronic confirmation to the student of submission
- Email confirmation of submission is also sent to the student's U of M Email account



#### **Bursar Staff Process**

Our staff will log in using the U of M credentials to the same site as the student logs in and will be able to click on the FOR ADMINISTRATORS tab. This will access all open appeals broken into one of three sections:

- Assign Initial Review
- Initial Review
- Manager Review





#### **Bursar Staff Process**

U00434342

#### **Assign Initial Review**

 Allows the appeals staff or manager to claim they are going to review this appeal

#### **Initial Review**

 Where those chosen to do the first detail review of the appeal find cases that have been assigned to them

#### **Manager Review**

 Where Managers find cases that have completed the Initial Review process, so they may be given a final review

U00434342-201610

#### **Student Financial Appeals Administration** Welcome Henry Robbins. **Assign Initial Review** Select an appeal below to assign for review. Appeal ID Student Submitted Banner ID U00624146-201610 Aleah Caldwell U00624146 7/26/2016 **Initial Review** Select an appeal below for review. **Assigned To** Status Appeal ID U00003023-201610 U00003023 Henry Robbins klmeans 11/14/2016 Pending Initial Review **Manager Review** Select an appeal below to review. Appeal ID Banner ID Student Submitted Status

Jeremy Barbarek

7/26/2016



Under Manager Review

#### **Bursar Staff Process**

#### **Improvements**

- Allows for better tracking of appeals
- Gives us everything in one place that a student submits
- Reduce the amount of time spent in Banner search for initial information such as class schedule and drop dates
- Now will be able to have the system do refund calculations on appeals instead of having to figure the credits out by hand
- Sends fully automated emails from a group email address versus a single person
- Gives an automatic countdown on appeals that the student has been notified of documentation needed
- Automatic notifications to staff members informing them of appeals to process



The Bursar's Office would like to take the time to thank the all of those on the Process Improvement team for taking time out of their schedules to help bring our out-dated process into the 21<sup>st</sup> century.

Carol Warren, Bursar Karen Smith, Financial Aid Colette Williams, Process Improvement Deanna McMillian, Enrollment Services Dru Welch, Admissions Office Gerri Taylor, Registrar's Office Helen Johnson, Provost Office Henry Robbins, Bursar's Office

Keri Means, Bursar's Office Patty Murry, Bursar's Office Polly Dennison, Registrar's Office Revon Thaxter, Bursar's Office Sara Hagan, EAS Veda Taylor, Registrar's Office

# **Questions?**



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





# What's Due?

Activity	Due Dates
Dining Dollars Refund Request Period-Fall 2016	Monday, November 28 - Friday, December 9, 2016
GA Fee Contracts for Spring Due to Graduate School	Tuesday, December 1, 2016
First Day State and UT/TBR Employees Using Fee Waiver May Register for Spring Courses	Tuesday, December 20, 2016
Law School Departmental Fee Waiver Deadline	Tuesday, January 3, 2017
Departmental Fee Waiver Deadline	Thursday, January 5, 2017
Law School Spring Fee Payment Deadline	Tuesday, January 10, 2017
Law School Spring First Day of Class	Wednesday, January 11, 2017
UG/GR Spring Fee Payment Deadline	Friday, January 13, 2017
UG/GR Spring First Day of Class	Tuesday, January 17, 2017



# What's Due?

Activity	Deadline		
Last Accounts Payable Check Run Prior to Thanksgiving Holiday (In order to ensure payments are processed. Documentation should be received at least seven days prior to deadline, Nov. 10th.)	Monday, November 21, 2016		
Time Sheet for BW24 Biweekly Payroll (Nov. 12th - Nov. 25th)	Wednesday, November 23, 2016		
Time Sheet for BW26 Biweekly Payroll (Dec. 10th - Dec. 23th)	Thursday, December 15, 2016		
Last Accounts Payable Check Run of Calendar Year (In order to ensure payments are processed. Documentation should be received at least seven days prior to deadline, Dec. 7th.)	Tuesday, December 20, 2016		
Workshops	Date		
Budget Basics	Monday, January 30, 2017		
UC – Senate Chamber Room 261	9:30 - 11:00 AM		
Accounting Basics	Tuesday, January 31, 2017		
UC – Senate Chamber Room 261	9:30 - 11:00 AM		



# Next Focus on Finance December 15, 2016 1:30 - 3:00 PM UC Memphis Room 340

Comments or suggestions?

Email: <a href="mailto:bffin@memphis.edu">bffin@memphis.edu</a>

Focus on Finance website:

http://memphis.edu/focusonfinance





# THANKYOU!

www.memphis.edu/finance