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 (https://fafsa.ed.gov)
  – 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

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

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

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

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

Services
• Hazardous Waste Disposal
  – Chemical Waste
  – Biological Waste
  – Radioactive Waste

Training
• 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

Training
- 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
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.
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
Fee Discounts & Waivers

Fax forms to the Bursar's Office at 901.678.0288. Forms must be received by the appropriate fee payment deadline to avoid a $100 late payment fee. U of M employees: please submit forms to the Human Resources Benefits Office for final approval and processing.

Rules & Regulations

Children of Licensed Tennessee Public School Teacher Fee Discount Rules & Procedures

Children of State of Tennessee Employee Fee Discounts Rules & Procedures

State of Tennessee Employee Fee Waiver Rules & Procedures

UofM, UT, or other TBR schools Employee Spouse/Dependent Fee Discount

UofM, UT, or other TBR schools Employee Fee Waivers

Programs for Persons with Disabilities

60 Years of Age for Audit or 65 Years of Age or Older

Veterans Programs and Benefits
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.
Educational Benefits Form Administration

Welcome Frances Hogan.

Entry and Management Tools
- Enter Non-UoM Employee Exemption
- Manage/View UoM Course Exemptions
- Manage/View Non-UoM Course Exemptions
- Manage/View Spouse Dependent Exemptions
- Manage/View Non-UoM Employee Exemptions (testing)
- View All Exemptions
- HR Spouse/Dependent Invoice Correction Memo

Bursar's Office Processes (Secured)
- Create Banner AR Waiver Exemption File
- Registration Status Code Change Export

Shared Services Center (SSC) Reports and Forms
- Student Invoices
- Create AP Check Request Form
- Create FUPLOAD File (Reminder: FUPLOAD script will pull everything in the database that has been processed by SSC.)
- Student Invoices Report

(Excel) Reports
- Students Working During Normal Work Hours (HR) :: 201680
- Students Working During Normal Work Hours (HR) :: 201650

Documentation/Testing
- User Testing Page
- System Documentation
Non-UM Employee Fee Waiver Form

Enter Student Banner ID: [ ]
   [Get Student Details]

Name: [ ]
Username: [ ]
Date of Birth: [ ]
Enter Exemption Code: [ ]

UofM Student ID: [ ]
Semester and Year: Fall Term 2016
Student is spouse or dependent? [ ] Spouse [ ] Dependent
Enter Tuition Waiver Amount: [ ]

Course Information

Select a course below for exemption codes '400', '401', '500', '501', '800', '811', '1000', '1500'.

<table>
<thead>
<tr>
<th>Select Course</th>
<th>Exemption</th>
<th>Benefit Request Date</th>
<th>Date Registered</th>
<th>CRN</th>
<th>Subject</th>
<th>Course#</th>
<th>Section#</th>
<th>Credit Hours</th>
<th>Title</th>
<th>POT</th>
<th>Online</th>
<th>Days of Week</th>
<th>Time</th>
</tr>
</thead>
<tbody>
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</tr>
</tbody>
</table>

No classes found.

Continue [ ]
Cancel [ ]

Send E-Mail: Cannot Verify Teacher License
Send E-Mail: Cannot Verify State Employment
Send E-Mail: Incorrect Approver
Send E-Mail: HR Certified too Early
Send E-Mail: Discount Applies to UG Only
Send E-Mail: Disapproved, Registered too Early
Send E-Mail: Disapproved, Over Age
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Questions, comments?

Email HRbenefits@memphis.edu or Bursar_ar@Memphis.edu 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.
Student Financial Appeal

Welcome Henry Robbins (U00003023).

Submit an Appeal

Click here for the student financial appeal form
Student Process

Student Financial Appeal

Student Name: Henry Robbins
Student UUID: hzrobbns
Banner UID: U00003023

Student Information

Address
City
State
Zip Code
Apt/Unit

Select one...
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.
Improvements

• 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
Student Process

Download the Health Verification Form 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
Student Financial Appeal System

Improvements

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

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
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 all of those on the Process Improvement team for taking time out of their schedules to help bring our out-dated process into the 21st century.

Carol Warren, Bursar
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
Karen Smith, Financial Aid
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?

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.)</td>
<td>Monday, November 21, 2016</td>
</tr>
<tr>
<td>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.)</td>
<td>Tuesday, December 20, 2016</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Workshops</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Basics</td>
<td>Monday, January 30, 2017</td>
</tr>
<tr>
<td>UC – Senate Chamber Room 261</td>
<td>9:30 - 11:00 AM</td>
</tr>
<tr>
<td>Accounting Basics</td>
<td>Tuesday, January 31, 2017</td>
</tr>
<tr>
<td>UC – Senate Chamber Room 261</td>
<td>9:30 - 11:00 AM</td>
</tr>
</tbody>
</table>
Next Focus on Finance
December 15, 2016
1:30 – 3:00 PM
UC Memphis Room 340

Comments or suggestions?
Email: bffin@memphis.edu

Focus on Finance website: http://memphis.edu/focusonfinance
THANK YOU!

www.memphis.edu/finance