Welcome to Focus on Finance & HR!
March 10, 2020
Agenda

• Introduction of New OIE Director
• Coronavirus Updates
• Foundation Dos & Don’ts
• Importance of SOC Codes
• Updates to Separation & Clearance System
• E-Contract Updates (Students & Faculty Summer Comp)
• Part-Time Faculty Appointment Reminders
• Upcoming Enhancements to WorkforUM & Org Charts
• Announcements & Deadlines
Introduction

Tiffany Cox

Director, Office for Institutional Equity
The University’s latest updates & communications about the COVID-19 virus can be found online at https://www.memphis.edu/coronavirusupdates.
QUESTIONS?
UofM Foundation — Finance

Carolyn Stanley
Director, UofM Foundation
Disbursements

• Spend according to the Donor Agreement (OnBase)

• Donor Agreements and Fund Documents can be viewed in Onbase under Foundation – Fund Agreement
  – Some funds may not have a donor agreement
  – Checks are processed weekly on Tuesdays and Thursdays. Checks processing turnaround time is 7 to 10 working days.
  – Rush checks should be discussed with Foundation Director or Accounting Manager. All paperwork should be given directly to the individual.
Disbursements

• Spend directly from the Foundation
  – Submit expenditure request form with supporting documents (receipts, contracts, invoices, etc.)
  – International travel must be approved by the University in advance of travel

• Spend through University
  – Submit a budget request form to establish budget or University index to Grant Accounting.
  – Expenses will be processed through University under University’s policies and procedures
Disbursements

- **Required Items (Auditing Purposes)**
  - For auditing purposes original detail receipts are required
  - Invoices should be paid timely to avoid late charges and rush checks
  - Avoid putting personal and business items on the same receipt
  - New vendors require a W-9 or SSN
  - All expenditures should have U#’s with the exception of new vendors
  - Receipts should be submitted for reimbursement within 30 days
  - Rental payments should be submitted with a contract
  - Transfer memos should state purpose and supporting documents should be included with paperwork
Disbursements

- Disbursements that need to spend through University
  - Salaries /Compensation
  - Cash awards to University employees
  - Payments to foreigner or foreign organization
  - Purchase through Tigerbuy
Miscellaneous Income

• The Foundation only receipts non-gift income
  – Income must be submitted along with a Foundation miscellaneous income transmittal form located at www.uofmfoundation.org
  – All funds that have a gift element and non-gift element will be accepted by the Gift Records Department

• Refund checks-All refund checks should go back to the fund the expense was paid from. The Foundation will not accept refund checks if the expense was not paid by the Foundation.
Foundation Forms

- Expenditure Form
- Banner Access Form
- Foundation Budget Request Form
- Miscellaneous Income Transmittal Form
- Etc.
Section IV: Payment Grid **ONE FORM PER ASSIGNMENT**

<table>
<thead>
<tr>
<th>Posn #</th>
<th>Proposed Effective Date</th>
<th>Approved Effective Date</th>
<th>End Date</th>
<th>Avg # Hours per wk</th>
<th>Pay Rate</th>
<th>Index</th>
<th>E-Class</th>
<th>SOC</th>
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Note: You may wish to view payroll calendars before selecting the Effective Date and the End Date.
Understanding SOC Codes

Bridgette Decent

Director, Institutional Research
What is the SOC?

- The Standard Occupational Classification system, or SOC, is designed to reflect the current occupational structure of the United States.
Where Do We Report SOC Data?

• IPEDS Human Resources Survey

• CUPA Human Resources (used in identifying positions)
Understanding SOC Codes

- The Human Resources Program Guide has a list of 28 major categories.
Every job at the University of Memphis has a SOC code.

- Permanent positions & faculty: SOC codes are linked to positions.
- Temps and Graduate Assistants: SOC information is entered at the time of hire.
Classify based on work performed, and required skills, NOT on job title.

- Child Care Support Specialist who does office work = 43-0000 Office and Administrative Support
- Child Care Support Specialist who provides childcare = 39-0000 Personal Care and Service Occupations
Coding Graduate Assistants

GA—Teaching
GA—Research
GA—Management
GA—Business and Financial Operations
GA—Computer, Engineering, and Science
GA—Community Service, Legal, Arts, and Media
GA—Library and Instructional Support
GA—Healthcare Practitioners and Technical
GAs working in all other occupational categories (i.e., clerical/secretarial, public service, etc.)

GA in the Department of Computer Science doing research = GA-Research
GA building websites for the IT department = Computer, Engineering, and Science.
University of Memphis Fall 2019 Employees by SOC

- 51-0000 Production Occupations
- 31-0000 Healthcare Support Occupations
- 25-4010 Archivists, Curators, and Museum Technicians
- 23-0000 Legal Occupations
- 25-4020 Librarians
- 53-0000 Transportation and Material Moving Occupations
- 17-0000 Architecture and Engineering Occupations
- 47-0000 Construction and Extraction Occupations
- 25-3000 Other Teachers and Instructors
- 39-0000 Personal Care and Service Occupations
- 29-0000 Healthcare Practitioners and Technical Occupations
- 25-4030 Library Technicians
- 19-0000 Life, Physical, and Social Science Occupations
- 33-0000 Protective Service Occupations
- 25-2000 Pre-school, Primary, Secondary, and Special Education School Teachers
- 21-0000 Community and Social Service Occupations
- 49-0000 Installation, Maintenance, and Repair Occupations
- 27-0000 Arts, Design, Entertainment, Sports, and Media Occupations
- 11-0000 Management Occupations
- 15-0000 Computer and Mathematical Occupations
- 13-0000 Business and Financial Operations Occupations
- 37-0000 Building and Grounds Cleaning and Maintenance Occupations
- 43-0000 Office and Administrative Support Occupations
- 25-9000 Other Education, Training, and Library Occupations
- 25-9044 Graduate Assistants
- 25-1000 Postsecondary Teachers
Updates to Separation & Clearance System

- Employees can no longer submit a form on themselves; a supervisor/designee should submit on behalf of the employee.
- Eliminated the manager’s acknowledgment section; this was a constant source of delays and mistakes.
- At any stage of submission or processing, the employee’s resignation document (.doc or .pdf formats are acceptable) can be (and should be) uploaded to the employee’s form. This means that at the time of submission, the supervisor should upload the resignation letter if it exists. If HR is in possession of the letter, we will upload it to the form during or after the processing stage.
- The automatic emails sent upon submission of the form and processing of the form have not changed.
E-Contract Updates

Danny Linton
Associate Director, Human Resources
E-Contract Updates

• Faculty Summer Compensation: Beginning now, faculty members cannot initiate their own contracts.

• FSC will now be offered as a standing e-contract training like all others.
E-Contract Updates

• Student Workers: In the breadcrumb bar, you can add a comment to an existing contract regardless of the contract’s status.

• To use this service you must have the Contract Number & Banner ID of the contract recipient.

• If a department has changes to contracts that do not require a change to the job loaded in Banner they can utilize this service for documentation and amendments to the signed contract, and coordinate among each other regarding working hours for students working in multiple departments.
E-Contract Updates

• Temporary Employees: A Process Improvement group is meeting now to develop an e-contract process for temps. Expected launch is January 2021.
WorkforUM and Org Charts: Updates & Reminders

Danny Linton
Associate Director, Human Resources
Storing Interview Notes

• In the coming weeks, HR will be adding a new tab to every applicant’s Application page.

• This new tab, called Supporting Documents, is to be used to electronically store interview notes from your committee.

• Uploading to each application will prevent you from having to maintain manual paper files for the required 5 years.
WorkforUM Updates & Reminders

Job application: Daniel Linton (Staff, Administrative Executive, & Contract Coaches)

Current Status: Under Review by HR
Application form: Application

Full name: Daniel Linton
Address: [redacted]
United States of America
Username: dweser
Email: dmlinton@memphis.edu
Phone (Primary): [redacted]
Position Type: Staff, Administrative Executive, & Contract Coaches
Office: Vice President Research (283000)

Created by: Daniel Linton
Owner: HR

Supporting Documents

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<th>Name</th>
<th>File Name</th>
<th>Description</th>
<th>Actions</th>
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<tbody>
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<td>02/27/2020 03:28 PM</td>
<td>dmlinton</td>
<td>Interview Notes.doc</td>
<td></td>
<td>Remove</td>
</tr>
</tbody>
</table>
Online Offer Letters

• In 2020, HR will be testing the use of online offer letters within hiring proposals. This is an electronic alternative to mailing a paper offer letter to a candidate (typical on the faculty side).

• Candidates can sign electronically or sign via ink with scan & upload.

• More details to come!
Part-Time Faculty Process

• The new 2020-21 PTF postings are now online.
• Remember that when hiring someone from these pools, these steps should be followed:
  – Code the selected candidate: under ‘Review by Department’ selection reason of ‘Offered Position’.
  – You must code each applicant that has applied up to that point. These will be under ‘Review by Department’ and determine if candidates are ‘employable’ or non-employable.

• [https://umwa.memphis.edu/econtract/pdf/ptf_appointment_guidelines.pdf](https://umwa.memphis.edu/econtract/pdf/ptf_appointment_guidelines.pdf)
WorkforUM Updates & Reminders

• Common Errors
  – Picking Supervisors
  – “Move in Workflow” link disappearing
  – Moving to Hired instead of Recommend for Hire
  – Getting an applicant back from Not Hired status
Org Chart Updates & Reminders

• The org charts offered at https://www.memphis.edu/hr/orgcharts.php have been optimized to no longer require a plug-in download.

• They also can now be viewed in any up-to-date Web browser.

• Check your charts and make any changes via WorkforUM supervisor change actions.
Announcements & Deadlines
Announcements & Deadlines

• First-Time Attendees at Focus on Finance & HR
Announcements & Deadlines

• Welcome Comfort Agyin-Birikorang!
Announcements & Deadlines

• Don’t forget to review the University’s current job openings at workforum.memphis.edu.
• Subscribe to our Twitter feed at @umemphisjobs!
• NEW! Follow us on Instagram! @uofmhr
Announcements & Deadlines

SPRING BUDGET – KEY DATES

• Revenue Projections ~ Due Friday, March 13, 2020
  – Email with instructions will be sent out Friday February 28, 2020
  – Instructions for preparing revenue budget revisions can be found on the Financial Planning website under the Frequent Asked Questions tab

• Capital/R&R/Facility Projects ~ Due Monday, March 30, 2020
  – If a Summer project is planned, submit by Spring deadline

• Expenditure & Position Paper Budget Revisions ~ Due Monday, March 30, 2020
  – Email with instructions will be sent out Friday February 28, 2020
  – If a position needs to be transferred for Fall, submit the transfer BR before deadline
  – Remember: no base budget revisions will be entered between the deadline and the opening of FY21

• BD4 Online Budget Revisions ~ Due Friday, April 3, 2020
  – Remember to align department budgets for the remainder of FY20
  – No functional changes after deadline
Announcements & Deadlines

• New Employee Orientation now lasts a half-day.
• After returning from lunch about 1:00 or 1:30pm, employees will go to their home departments.
Announcements & Deadlines

- Hiring departments should assist employees with their assigned Post-Orientation Tasks (available in the MyMemphis portal’s Employee tab).

New Employee Post-Orientation Tasks

- Review/Update Form W-4
- E-Mail Account Setup
- Campus ID Card
- Review Parking Information
- Review Payroll Information
- Complete Online Confidentiality Acknowledgement
- Complete IT Security Training
- Complete Title VI Training
- Complete Discrimination & Harassment Prevention Training
- Complete FERPA Tutorial
- Using your memphis.edu e-mail address, complete:
  - Payroll Direct Deposit
  - Vendor Payment Direct Deposit
Announcements & Deadlines

- Performance appraisals
- Annual faculty appraisals were released in WorkforUM on January 28.
- Annual staff appraisals, completed in the SAMS system, are due to Human Resources by April 30, 2020 and should (generally) reflect May 1, 2019 – April 30, 2020.
- SAMS training is available now in Learning Curve.
Announcements & Deadlines

• Accounting Basics Training
  April 17, 2020 - 1:30pm
  AD178

• Budget Basics Training
  May 28, 2020 - 9:30am
  AD178

• Timesheets, Leave Reports, & Approvals
  April 16, 2020 – 10:00am
  AD178
Announcements & Deadlines

• Customer Service Training  
  March 10, 2020 – 2:00pm

• Communication, Civility, & Ethics in the Workplace  
  March 13, 2020 – 10:00am

• True Colors (Personality Assessments)  
  March 20, 2020 – 10:00am

All sessions in AD177B. Sign up in Learning Curve!
Announcements & Deadlines

• Faculty Summer Compensation E-Contracts
  April 16, 2020 – 2:00pm
  AD178

• WorkforUM Training
  April 29, 2020 – 1:30pm
  AD178
Announcements & Deadlines

- **Pre-Retirement Seminar**
  - Thursday, April 30
  - University Center
  - Invitations first to employees potentially nearing retirement, then open to all University employees as space allows
NEXT MEETING
April 14, 2020
340 University Center
Thank you for attending!
memphis.edu/focus