

An aerial photograph of a university campus during sunset. The sky is filled with vibrant orange, pink, and purple clouds. The campus below is a mix of brick buildings, green lawns, and trees. A prominent tall brick tower is visible in the lower center. The text "Welcome to Focus on Finance & HR!" is overlaid in large, bold, white font across the top half of the image.

Welcome to Focus on Finance & HR!

September 15, 2020



Agenda

- Working with ESAC
- ITS Announcements
- Focus on Finance & HR Survey Results
- Online Web Application for Revenue Accounts & More Financial Planning News
- 2020 Benefits Open Enrollment Period
- COVID-19 Updates
- Announcements & Deadlines



ALL YOU EVER WANTED TO KNOW ABOUT ESAC

Robert Johnson, Jr.
Associate Chief Information Officer

ESAC is...



The Enterprise Systems Advisory Committee

<https://www.memphis.edu/its/governance/esac.php>



Who Serves on ESAC?

- Team leaders from the core modules (Finance, HR, Student, Advancement)
- AVP level / key principals from administrative and academic divisions
- Faculty / Staff Senate representatives
- ITS staff (ex-officio)

In addition, there are five permanent committee members. The CIO appoints the Chair for a two-year term.



What Are Members Asked to Do?

- Provide input on behalf of constituents
- Disseminate IT-related information
- Assist in implementing IT policy and procedures
- Review and prioritize proposals from all university departments for IT systems, services and support
- Make recommendations with a University perspective
- Attend meetings bi-weekly (or as needed) throughout the year



How Does ESAC Apply to You?

If your area is contemplating an IT-related project or product, you will eventually bring the project to ESAC.

ESAC will review the proposal to make sure that:

- There is an executive sponsor from the President's Council
- The project comes with adequate funding
- The project does not conflict with or duplicate another project or product
- The scheduling permits the addition of the project to the queue



How Do You Prepare for ESAC Review?

The Project Checklist gets you started.

In working with one or more ITS project managers your team will research, investigate and detail the proposed system you are considering. You will be asked to include the details surrounding costs, timelines and the overall effort involved in implementing this proposed project. A project checklist will be used in your formal presentation to the Enterprise Systems Advisory Committee (ESAC).

<https://www.memphis.edu/its/governance/esacprojectchecklist.pdf>



ITS ANNOUNCEMENTS

Karen Bell
Director, IT Security

Annual Security Awareness Training



Current Employees

- Annual IT Security Awareness Training window opens October 1 to coincide with Cybersecurity Awareness Month.
- This training is already required for all regular employees.
- New this year, it will also be required for all other employees including temps, adjuncts, student workers and graduate Assistants.
- Current employees will receive an email around October 1 with information and a link to the course.

Annual Security Awareness Training



Current Employees (continued)

- The course offers the ability to test out of some parts so that the only modules that have to be viewed are the ones for which a refresher is required.
- The course takes less than 1 hour and must be completed by February 28, 2021.

New Hires

- New hires after October 1 must take the entire course within the first 30 days of employment and annually thereafter. The entire course takes about 1 hour.
- New hires after October 1 will receive an email with instructions and a link to access the course shortly after completing their New Hire Orientation session.

SSO Use Encouraged



- If your department uses any 3rd party applications, ITS invites you to engage us to determine if the application can be integrated into our Single Sign On services.
- SSO provides 2 additional layers of security on those applications:
 - centralized control of login credentials.
 - protected by two-factor authentication (Duo).
- To initiate a review with us, enter a ticket with the ITS Service Desk or email us directly at umtech@memphis.edu.

U THE UNIVERSITY OF MEMPHIS.

Login to SANS Securing the Human

UUID
Imbrgnle

Password
.....

Login

- > Forgot your username?
- > Reset your password?
- > Initialize your account?
- > Need help?

By using this service, you acknowledge that you have read and agree to the terms and conditions of the Acceptable Use of Information Technology Resources Policy (UM1535)



Duo for Students

- Duo two-factor authentication is already required for all employees.
- We are encouraging students to opt-in now to take advantage of the added security benefits.
- You will see notices on University social media accounts, the Daily Helmsman and in various e-newsletters.
- If you have any student workers in your department, encourage them to opt-in.
- Sign up + information:

<https://www.memphis.edu/its/security/duo.php>



FOCUS ON FINANCE & HR SURVEY RESULTS

Danny Linton
Associate Director, Human Resources



Focus on Finance Survey Results

- Earlier this summer, we surveyed the Focus on Finance & HR group members for their feedback on our meetings.
- These results are being used to help us plan meetings for the future.

Focus on Finance Survey Results



How often have you attended the monthly Focus on Finance & HR meetings during 2019-20?	
Always attend	50.00%
Sometimes attend	44.12%
Rarely attend	2.94%
Never attend	1.47%
No answer	1.47%

To be removed from the Focus on Finance mailing list, e-mail hr@memphis.edu.

Focus on Finance Survey Results



Do you believe that the Focus on Finance & HR meetings help you do your job better?

Yes	92.65%
No Answer	5.88%
No	1.47%

Focus on Finance Survey Results



Do you regularly share the information provided at Focus on Finance & HR meetings with the other employees in your area?

Always	44.12%
Most of the time	38.24%
About half of the time	7.35%
No answer	5.88%
Rarely	4.41%

Please always update your departments on the information shared at Focus on Finance & HR!

Focus on Finance Survey Results



Beginning in Fall 2019, the "Focus on Finance" and "HR Partners" groups were merged into one group called Focus on Finance & HR. Would you like to see these groups remain together or return to being held separately?

Remain together	89.71%
No answer	5.88%
Return to being held separately	4.41%

The Focus on Finance and HR Partners groups will remain merged & will meet together.

Focus on Finance Survey Results



In March 2020, Focus on Finance & HR meetings went to a virtual format, meeting via Zoom. When conditions return to normal, which of the following would you prefer?

Keep meeting on Zoom, even when all employees are back on campus	79.41%
Return to meeting in person	14.71%
No answer	5.88%

Current plans are for this group to continue meeting via Zoom, even when we are back on campus.

Focus on Finance Survey Results



Have you visited the Focus on Finance & HR Web site in the last year?

(<https://www.memphis.edu/focus>)

Yes	88.24%
No	5.88%
No answer	5.88%

Feel free to share this site with your departments when you update them. Recordings of our virtual meetings are available.

Focus on Finance Survey Results



In general, how would you rate the CONTENT of the Focus on Finance & HR meetings?

Very Good	52.94%
Excellent	26.47%
Good	11.76%
No answer	5.88%
Fair	2.94%
Poor	0.00%

Focus on Finance Survey Results



In general, how would you rate the MODERATORS AND PRESENTERS at the Focus on Finance & HR meetings?

Very Good	50.00%
Excellent	25.00%
Good	17.65%
No answer	5.88%
Fair	1.47%
Poor	0.00%

Focus on Finance Survey Results



How would you rate the FREQUENCY of the Focus on Finance & HR meetings?	
Meetings are held just often enough	86.76%
Meetings are not held often enough	5.88%
No answer	5.88%
Meetings are held too often	1.47%

Meetings will continue as normal, from September thru June. Additional meetings may be added as needed.

Focus on Finance Survey Results



How would you rate the LENGTH of the Focus on Finance & HR meetings? (Meetings currently run 60-90 minutes in length.)

Just right	83.82%
Too long	10.29%
No answer	5.88%

Thanks for sharing your feedback!



ONLINE WEB APPLICATION FOR REVENUE ACCOUNTS & FINANCIAL PLANNING NEWS

Deborah Becker
Assistant Vice President, Financial Planning and Analysis

Fall 2021 October Budget



- Financial Planning Email Communication
- Revenue Process
- Key Dates



Budget Revision Process Changes

- All budget revisions must be submitted to Financial Planning as PDF documents. Excel and paper versions will be returned for PDF version.
- DocuSign cannot be used to approve budget revisions. Please add signatures in Adobe software. Directions can be provided upon request by Financial Planning.
- Approved budget revisions should be submitted to the new “inbox” email address: FPRevisions@memphis.edu.
- Please direct all questions to budget@memphis.edu.



Revenue Budgets – Process Update

- Purpose: to simplify the revenue review process and limit paper distributions
- Goal: Designees and Financial Managers to review report and make any necessary Revenue changes with Budget Revisions or Accounting Transfer Vouchers –
(Use Transfer Voucher for corrections of actual transactions posted)
- Eliminating the Revenue Certification Process
- New Web Application for Revenue Review



Revenue Review – New Web Application

- Email will be sent out with notification & link
- Accessed via Finance Program Guide
 - Under Utilities and Reports
 - Similar to current Budget Overexpenditures email & report

UTILITIES & REPORTS
budget overexpenditures
e~Print
revenue budget

FORMS
accounting
budget
direct deposit
procurement
system access

HR PROGRAM GUIDE
TIGERBUY WEB SITE

Revenue Budget

To help you manage your accounts, we are providing this notice to aid in the reviewing of the revenue budget and actuals as shown on Banner Finance records.

Please see the column header descriptions below:

- PY2 YTD Actuals: year-to-date Actuals data as of the reporting fiscal period from 2 years prior
- PY YTD Actuals: year-to-date Actuals data as of the reporting fiscal period from 1 year prior
- CY YTD Actuals: year-to-date Actuals data as of the report date for the current fiscal year

Following are the details of the revenue account(s) as of September 17, 2020. Please note that this is a static file as of the date indicated.

Index	Fund	Org	Prog	Actv	Account	Account Title	PY2 YTD Actuals	PY YTD Actuals	CY YTD Actuals	CY Adj Budget	CY Avail Bal	CY vs PY	CY Base Budget
123456	110001	246810	2000		58360	Sales and Services Non Taxable	5,199.00	5,436.80	-	18,000.00	(18,000.00)	(5,436.80)	18,000.00
123456	110001	246810	2000		51726	Application Fees	2,050.00	1,725.00	600.00	5,000.00	(4,400.00)	(1,125.00)	5,000.00
123456	110001	246810	2000		51801	Material Fees Regular Term	9,251.25	8,778.75	8,512.50	17,700.00	(9,187.50)	(266.25)	17,700.00



Revenue Budgets – Process Update

- Revenue Email notification will still be sent out with additional instructions
- FYBR001 - Fall Revenue Budget Estimate/Worksheet by Org - will continue for reference and can be accessed via Eprint
 - You will no longer need to print and return signed FYBR001 worksheets
- BR's to be submitted directly to Financial Planning through FPRevisions@memphis.edu.
 - (Academic Affairs units to submit to Provost office first)
 - (Auxiliary units to submit to Colis Chambers - cchambrs@memphis.edu)
- If desired, you may schedule a time for individual review with a Financial Planning Staff member
 - Tuesday, Sept 22nd and Wednesday, Sept 23rd



Key Dates – October Budget

- Revenue Projections - Due Friday, September 25, 2020
 - Email with instructions will be sent out Friday, September 18, 2020
 - Financial Planning Office will be available for individual meetings Tuesday, Sep 22nd and Wednesday, Sep 23rd @ budget@memphis.edu
 - Instructions for preparing revenue budget revisions can be found on the Financial Planning website under the Frequently Asked Questions tab
- Expenditure Projections - Due Tuesday, September 29, 2020
 - Departments can process Online Budget Documents till Wed, October 7, 2020
- Position Budget Revisions - Due Thursday, September 24, 2020
 - Current & Base Budget Revisions to be included in Fall Budget
- Capital/R&R/Facility Projects - Due Friday, September 25, 2020

October Budget



Expenditure Projections:

- The deadline for base expenditure revisions is Thursday October 1, 2020 and for current year online revisions, the deadline is Wednesday October 7, 2020.
- Please remember that any online budget revisions must be entered and moved through the approval queues by the end of day, on Wednesday, October 7, 2020 to be included in the October budget submission.

Divisional Carryforward balances:

- The FY20 carry forward funds will be 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.



Fall Budget – FY21 Benefit Fringe Rate

Benefits FY21 Fringe Rate

- 36.3% Salaried Employees
- 55.9% Hourly Employees
- 7.2% Temp Employees – No Insurance
- 32.3% Temp Employees – With Insurance
- 1.1% Student / GA

Financial Planning and Analysis Office



- Email: budget@memphis.edu
- Phone: 901.678.2117
- Website: <http://www.memphis.edu/budget>

THE UNIVERSITY OF
MEMPHIS

FINANCIAL PLANNING AND ANALYSIS

Staff Directory University Budget Information FAQs Links

UNIVERSITY BUDGET
The current University budget can be found online, as can those from previous years.



QUESTIONS?



2020 BENEFITS OPEN ENROLLMENT PERIOD

Suprena Gear
Employee Benefits Specialist



Open Enrollment October 1 – October 16

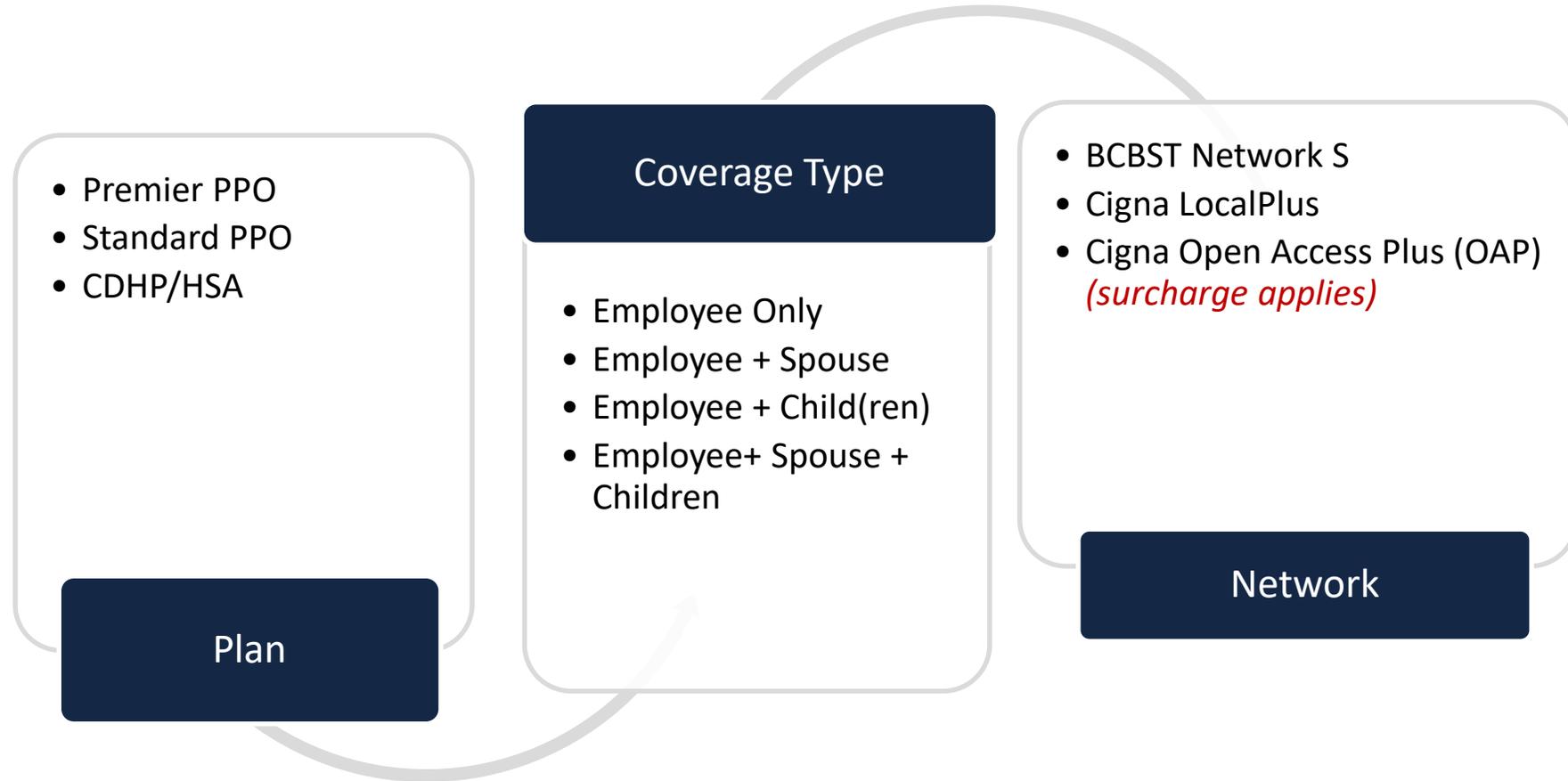
- You must use Employee Self Service (ESS) in [Edison](#).
- **Enroll early!** Submit your changes as early as possible.
- Enrollment ends at 4:30 p.m. Central on October 16. You must click **Submit** in ESS to finalize your selections.
- All new dependent verification documents must be received by 4:30 p.m. Central on October 16.
- **Life insurance:** Use the Securian (Minnesota Life) website to enroll in voluntary term life insurance at www.lifebenefits.com/stateoftn.
- **CDHP/HSA:** Employees must update their HSA contributions each year.
- **Flexible benefits:** enroll on the website at optumbank.com/tennessee.



What's New for 2021

- **Health insurance premiums will increase by 2.8%.** No premium increases for vision, disability and life insurance plans. **Cigna Prepaid dental premiums will increase by 3%.** MetLife DPPO dental premiums will not increase.
- Same health plans and network options as last year. Health insurance copays, coinsurance and deductibles are staying the same. Find [premium charts](#), benefits [comparison charts](#) for health, dental, vision and more at tn.gov/partnersforhealth.
- HSA/FSA vendor **will change** to Optum Bank beginning Jan. 1, 2021. Affected members will receive more information later this year.
- Some osteoporosis medications will be added to the maintenance tier drug list. The maintenance tier allows you to receive a 90-day supply of these drugs from a Retail-90 or mail order pharmacy at a reduced cost. See the [Pharmacy webpage](#) for details.

Health Insurance



Even if you don't make any changes, you should review your enrollment every year. The plans, networks and benefits may change and impact you.

Virtual Benefits Fair



- Due to the COVID-19 pandemic, the standard Human Resources Benefits Fair will not be held as normal.
- Instead, the State of Tennessee will be hosting a series of online webinars with the various vendors of our medical, dental, vision, and other plans to help address any questions you may have.
- Webinars between September 10-25; a list of webinars is detailed at <https://www.memphis.edu/hr/aetp.php>.



Benefits Informational Meetings

- HR will host virtual informational sessions to introduce and answer questions about the available benefit plans.
- Scheduled between October 1-16; please visit [Learning Curve](#) to sign up for a session. (Look under the Human Resources category.)
- Sr. HR Business Partners are available to coordinate meetings with their various departments as requested. To request a meeting with your area's Business Partner, please e-mail hrbusinesspartners@memphis.edu.



Flu Shots

- **Main Campus:** October 6, 2020, 10am-2pm
(University Center Iris Room 338)
- **Lambuth Campus:** October 8, 2020, 11am-2pm
(Varnell-Jones Hall)
- Access to these shots is **BY APPOINTMENT ONLY**
([Main Campus Appointments](#) | [Lambuth Campus Appointments](#))



If You Do Nothing...

- Employees who do not log in to Edison or who make no changes will keep the same coverages that they had in 2020.

EXCEPT...

- FSA/HSA elections **MUST** be made every year.

Open Enrollment for 2021 Benefits



Visit <https://www.memphis.edu/hr/aetp.php> for information and links regarding Open Enrollment

Questions?



COVID-19 UPDATES

Kristil Davis

Director, HR Strategic Initiatives & Talent Management



EXPOSURE TO COVID-19

EXPOSURE CRITERIA:

Contact within 6 feet for 10 minutes or more with a person with suspected or confirmed COVID-19.

EXAMPLES INCLUDE:

Working together in close proximity with someone with COVID-19 symptoms or has tested positive for COVID-19.

Being in a meeting with someone with COVID-19 symptoms or has tested positive for COVID-19 with no social distancing.

Traveling in the same vehicle with someone with COVID-19 symptoms or has tested positive for COVID-19.

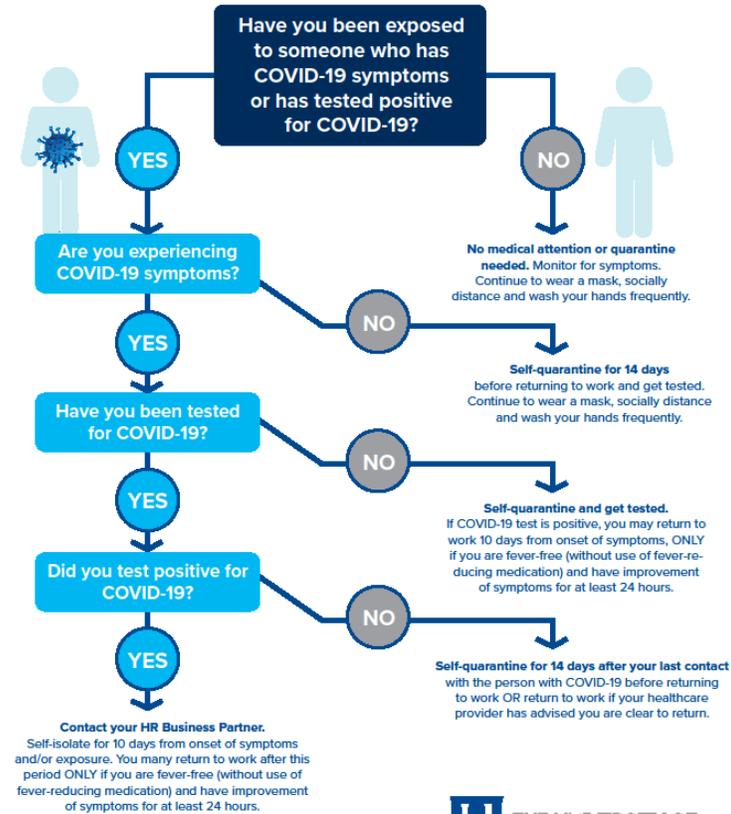
Living with someone with COVID-19 or has tested positive for COVID-19.

Exposure to COVID-19

We have developed a flyer available to all employees to assist with COVID exposures and positive cases.

The flyer is available on [HR's website](#).

Please share with your employees, departments, and in some cases post on your bulletin boards and timeclocks.



Be sure to contact your supervisor and HR Business Partner once an exposure and/or positive test is received.
901.678.3573
hrbusinesspartners@memphis.edu





Exposure to COVID-19 Key Points

- Exposure criteria is contact within 6 feet for 10 minutes or more with a person with suspected or confirmed COVID-19
- Quarantine periods are 14 days from the date of exposure
- Isolation periods are for 10 days from onset of symptoms
- Always contact your HR Business Partner for next steps
- When testing and/or pending test results after an exposure, **DO NOT** return to work, until you receive a negative result



Quarantine vs. Isolation

Quarantine

- Keeps someone who was in close contact with someone who has COVID-19 away from others.
- Stay home.
- 14 days since day of exposure.
- Check your temperature twice a day and watch for symptoms.
- When possible stay away from people who are at higher risk for getting sick from COVID-19.

Isolation

- Keeps someone who is sick or tested positive for COVID-19 without symptoms away from others, even in their own home.
- Stay home at least 10 days since symptoms first appeared (date of test if no symptoms) and at least 24 hours with no fever without fever-reducing medication with improved symptoms.
- Designate a sick room or area away from other people or animals. Use a separate bathroom, if available.



Contact Tracing

Effective September 14th, HR has begun to manage all COVID-19 cases in Maxient.

- More efficient way of notifying appropriate individuals such as supervisors, Physical Plant and others through contact tracing
- Provides quick and easily assessible data on case statuses
- Allows an efficient way to track and manage case deadline dates such as quarantine and isolation periods

Employee Work Location Update



- On September 8, 2020, you should have received an email from the Division of Business and Finance to update your work location status.
- Location updates should occur only when there is a change in your normal work pattern (onsite, remote and/or hybrid).
- Based on the next phase of the return plan, departments should evaluate their staffing levels to accommodate up to 50% of employees onsite. Employees who will remain remote or in a hybrid status should be sure to complete an AWA.
- Please get your area's employees to submit this information!

Employee Work Location

My current work location status is:

WORKING ON CAMPUS

Please update this response as your location status changes. This information is being reported to the Tennessee Higher Education Commission in response to the COVID-19 pandemic.



ANNOUNCEMENTS & DEADLINES

Announcements & Deadlines



- Welcome to all first-time attendees at Focus on Finance & HR!



Announcements & Deadlines

- Faculty Administrative Services has moved from the Provost's Office to Human Resources.
- Sheila Mathis and Sophia Dorsey are still here to assist you with all your faculty hiring & other associated needs.
- Office locations, phone numbers, & emails have not changed, though the FAS website & its materials now reside on HR's site.

Announcements & Deadlines: Travel Policy Changes



- All expenses require a receipt (including airport parking)
- All mileage calculated point-to-point (no City Mileage Chart or standard mileage to/from MEM airport)
- All Lodging, Meals & Incidental per diems based on CONUS, OCONUS and US Dept. of State rates
- Reimbursement by Direct Deposit
- International travel requests must be submitted at least 10 business days before date of departure
- Tips, up to 20% of the base expense amount, are allowed (taxi, rideshares, etc.)



Travel Policy Contact Information

Accounting Department

accountspayable@memphis.edu

Shared Services Department

shareservices@memphis.edu



Announcements & Deadlines

US Bank / AP Vendor Campaign

- Convert vendors to electronic payments
- Vendors will get emails & calls
- Potentially \$41 million to rebate eligible spend



Announcements & Deadlines

Fuelman Cards

- Love's Travel Stops has been removed from Fuelman's list. Fueling at Love's charges an extended network fee of \$5 to \$10 to the department's account.
- Contact [Constance Butts](#) in Procurement with any questions.



Announcements & Deadlines

- Don't forget 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



- The 2021 & 2022 UofM holiday schedules have been approved and posted online at:
<https://www.memphis.edu/hr/holidays.php>



Announcements & Deadlines

Upcoming EAP Webinars
Register in Learning Curve!

- October 7th @ 2pm
Living in Uncertain Times During COVID-19
- November 4th @ 10am
Mindfulness: Preparing for the Upcoming Holiday Season



Announcements & Deadlines

- Part-Time Faculty E-Contract Training
October 19th @ 2pm
- Graduate Assistant E-Contract Training
October 20th @ 2pm
- Extra Compensation E-Contract Training
October 21st @ 2pm
- Student Employment E-Contract Training
October 21st @ 3pm
- Will meet [via Zoom](#), but please register in [Learning Curve](#)!



Announcements & Deadlines

- WorkforUM Training
October 28th @ 1:30pm
- Will meet [via Zoom](#), but please register in [Learning Curve](#)!

Announcements & Deadlines



- Other Finance & HR Trainings can be held via Zoom, dependent upon demand.



Announcements & Deadlines

- Need someone added to the Focus on Finance & HR mailing list?
- Don't forward to them—forward to us!
- hr@memphis.edu

An aerial photograph of the University of Memphis campus during a vibrant sunset. The sky is filled with soft, colorful clouds in shades of orange, pink, and purple. The campus buildings, mostly brick and multi-story, are visible below, interspersed with green trees and lawns. The overall scene is peaceful and scenic.

NEXT MEETING

Tuesday, October 20, 2020 @ 2:30pm
memphis.edu/focuszoom

An aerial photograph of the University of Memphis campus during a vibrant sunset. The sky is filled with soft, colorful clouds in shades of orange, pink, and purple. The campus below is a mix of brick buildings, green lawns, and trees. A prominent tall brick tower is visible in the lower center. The overall scene is peaceful and scenic.

THANK YOU FOR ATTENDING!

[memphis.edu/focus](https://www.memphis.edu/focus)