



FOCUS ON FINANCE & HR

February 20, 2024



AGENDA

- Government and Community Affairs
- Adjustment Time Sheets
- Post Award Foundation Accounts
- Vendor Payment Transmittal Form
- Reporting Emergency Leave...Or Not
- Announcements & Deadlines

Government and Community Affairs



Allie Jones, Deputy Chief Government Relations & Policy Officer

2024-25

The University of Memphis BUDGET REQUESTS

\$65 million

(per year for 3 years)

Existing capital renewal

\$5.4 million

(non-recurring)

Safety and security upgrades

\$2 million

(recurring)

Brain Center expansion

\$65 million

(non-recurring)

Research modernization (THEC capital outlay request)





Federal, State, and Local Government Relations

- Managing issues related to funding and operations
- Compliance with government regulations
- Reporting of university progress on several government programs
- Resolution of problems experienced by or with the campus in government processes

Office e-mail: govrel@memphis.edu



QUESTIONS?

Adjustment Time Sheets



Russ Teague, Payroll Manager



What's New

- **All** Adjustment Timesheets are now submitted via Etrieve.
- **No** paper timesheets will be accepted.
- Simply go to forms on the Payroll website and click on [“Adjustment Time Sheet”](#) and fill out as explained below in the presentation.

Adjustment Time Sheets: Purpose



- Used for non-exempt employees only.
- Adjusts time submitted on the Web Time Sheet after the deadline or payroll has passed.
- Submits time for a past payroll.



Adjustment Time Sheets: Requirements

- Generally submitted by business officer or department admin/timekeeper.
- Total of top section must equal total of bottom section.
- Top section tells type of earnings being adjusted and bottom tells hours by day.



Adjustment Time Sheets

- Payroll Period and the dates of the payroll periods may be found on the [Payroll Schedules web site](#) for the current Fiscal Year (2023-24).
- Once the pay period is selected, the dates auto-populate.
- Enter the employee ID and their name and position, title, org #, and department name auto-populates.
- Most common earnings codes:
 - 009 – Regular pay for benefit eligible employees
 - 014 – Graduate Assistant – Doctoral
 - 015 – Graduate Assistant – Master’s
 - 019 – Hourly Temporary Employees
 - 025 – Work-Study Students
 - 026 – Regular Student Worker
 - 032 – Overtime 1.0 (Straight OT)
 - 035 – Overtime 1.5 (Premium OT)
 - 150 – Holiday
 - 152 – Emergency Closing
 - 170 – Annual Leave
 - 180 – Sick Leave
 - 420 – Leave without Pay

U THE UNIVERSITY OF MEMPHIS BW Adjustment Time Sheet

Enter the Payroll Year: Select the Pay Period: Start Date: End Date:

Enter the Banner ID: Employee Name: Select the Position-Suffix:

Position Title: Org Number: Department Name:

Adjustment Time Sheet Examples



- Regular employee reported time as Regular, but the employee was actually out on sick leave.

U of M THE UNIVERSITY OF MEMPHIS

BW Adjustment Time Sheet

Enter the Payroll Year: 2024 Select the Pay Period: 1 Start Date: 12/16/2023 End Date: 12/20/2023

Enter the Banner ID: 180477718 Employee Name: [REDACTED] Select the Position-Suffix: 001011 - 00

Position Title: Payroll Associate Org Number: 5.13000 Department Name: Payroll Office

Detailed Adjustment Hours

Do not report all the time as it should have been for the pay period being adjusted. Report only the days needing an adjustment. Reporting all the time a second time could result in the employee being overpaid.

Date of Change:	Earnings:	Hours Changed #(-):
12/16/2023	Regular	-7.50
12/18/2023	Sick Leave (SL)	7.50

Total Hours

Regular	OTS	OT	Annual	Sick	Holiday
-7.50	0.00	0.00	0.00	7.50	0.00

Other: 0.00 Total Hours: 0.00

Select Person to Approve form:

ApproverProxy: Russell Tesque - Proxy Email: rtesque@memphis.edu

Acknowledgement

By submitting this form, I, Russ Tesque, certify that supporting time card(s) and/or time clock document(s) signed by the employee and approved by the supervisor are on file in this department for the employee listed above. I hereby certify that the time in attendance, hours worked, and leave time reported above is true and accurate and in compliance with provisions of the fair labor standards act and University policy and procedures. All services were performed for the benefit of this budgetary unit. All work assignments for CWSP students have been performed in a satisfactory manner.

Submitter UID: U00003307 Submitter Name: Russ Tesque Extension: 9999 Date: 01/09/2024

Adjustment Time Sheet Examples



- Student worker failed to turn in time for the BW1 pay period but did work.

U of M THE UNIVERSITY OF MEMPHIS **BW Adjustment Time Sheet**

Enter the Payroll Year: 2024 Select the Pay Period: 1 Start Date: 12/15/2023 End Date: 12/29/2023

Enter the Banner ID: U00708243 Employee Name: [REDACTED] Select the Position-Suffix: ST0001 - OI

Position Title: Student Assistant Regular Org Number: 513000 Department Name: Physical Office

Detailed Adjustment Hours

Do not report all the time as it should have been for the pay period being adjusted. Report only the days needing an adjustment. Reporting all the time a second time could result in the employee being overpaid.

Date of Change:	Earnings:	Hours Changed +(-):
12/18/2023	Regular	7.50
12/18/2023	Regular	7.50
12/20/2023	Regular	7.50

[Add Row](#)

Total Hours

Regular	OTS	OT	Annual	Sick	Holiday
22.50	0.00	0.00	0.00	0.00	0.00

Other: 0.00 Total Hours: 22.50

Select Person to Approve form:

Approver/Proxy: Russell Teague - Proxy Email: rteague@memphis.edu

Acknowledgement

By submitting this form, I, Russ Teague, certify that reporting time card(s) and/or time clock document(s) signed by the employee and approved by the supervisor are on file in this department for the employee listed above. I hereby certify that the time in attendance, hours worked, and leave time reported above is true and accurate and in compliance with provisions of the fair labor standards act and University policy and procedures. All services were performed for the benefit of this budgetary unit. All work assignments for CWSP students have been performed in a satisfactory manner.

Submitter UID: U00003307 Submitter Name: Russ Teague Extension: 8888 Date: 01/09/2024

Adjustment Time Sheet Examples



- Hourly temporary employee stayed over to help with project after BW1 time was submitted and approved. Overtime was not reported.

MC THE UNIVERSITY OF MEMPHIS **BW Adjustment Time Sheet**

Enter the Payroll Year: 2024 Select the Pay Period: 1 Start Date: 12/15/2023 End Date: 12/20/2023

Enter the Banner ID: 100002024 Employee Name: [REDACTED] Select the Position-Suffix: TH0001 - 00

Position Title: Hourly Temporary Employees Org Number: 110000 Department Name: FedEx Institute of Technology

Detailed Adjustment Hours

Do not report all the time as it should have been for the pay period being adjusted. Report only the days needing an adjustment. Reporting all the time a second time could result in the employee being overpaid.

Date of Change:	Earnings:	Hours Changed +/-:
12/22/2023	Overtime Single (01Z)	2.50
12/22/2023	Overtime Premium (02Z)	3.00

Add Row

Total Hours

Regular	OTS	OT	Annual	Sick	Holiday
0.00	2.50	3.00	0.00	0.00	0.00

Other: 0.00 **Total Hours:** 5.50

Select Person to Approve form:

Approver/Proxy: [REDACTED] Proxy Email: [REDACTED]

Acknowledgement

By submitting this form, I, Blond, Tregan, certify that supporting time card(s) and/or time clock document(s) signed by the employee and approved by the supervisor are on file in this department for the employee listed above. I hereby certify that the time in attendance, hours worked, and leave time reported above is true and accurate and in compliance with provisions of the fair labor standards act and University policy and procedures. All services were performed for the benefit of this budgetary unit. All work assignments for CWSP students have been performed in a satisfactory manner.

Submitter UID: 100002007 Submitter Name: Tregan, Tregan Extension: 9999 Date: 01/09/2024

Adjustment Time Sheet Examples



- Student worker reported and turned in time that she was going to be at work on the 1st Friday of the time period, but she did not show up for work.

BW Adjustment Time Sheet

Enter the Payroll Year: 2024 Select the Pay Period: 1 Start Date: 12/15/2023 End Date: 12/29/2023

Enter the Banner ID: U00198243 Employee Name: [REDACTED] Select the Position-Suffix: S10001 -04

Position Title: Student Assistant Regular Org Number: 113000 Department Name: Payroll Office

Detailed Adjustment Hours

Do not report all the time as it should have been for the pay period being adjusted. Report only the days needing an adjustment. Reporting all the time a second time could result in the employee being overpaid.

Date of Change: 12/23/2023 Earnings: Regular Hours Changed +(-): -3.50

Total Hours

Regular	OTS	OT	Annual	Sick	Holiday
-3.50	0.00	0.00	0.00	0.00	0.00

Other: 0.00 Total Hours: -3.50

Select Person to Approve form:

Approver/Proxy: Russ Teague - Proxy Email: rteague@memphis.edu

Acknowledgement

By submitting this form, I, Russ Teague, certify that supporting time card(s) and/or time clock document(s) signed by the employee and approved by the supervisor are on file in this department for the employee listed above. I hereby certify that the time in attendance, hours worked, and leave time reported above is true and accurate and in compliance with provisions of the fair labor standards act and University policy and procedures. All services were performed for the benefit of this budgetary unit. All work assignments for CWSP students have been performed in a satisfactory manner.

Submitter UID: U00003207 Submitter Name: Russ Teague Extension: 9999 Date: 01/09/2024



Frequently Asked Questions:

What is the purpose of an Adjustment Timesheet?

To provide employees with an opportunity to make corrections to their original timesheet that has already been submitted and approved.

Do I report all the time for the pay period a second time as it should have been?

No. Only adjustments to the original timesheet are reported on this timesheet. Reporting all of the time a second time would result in the employee being overpaid.

How do I know if the timesheet is completed?

Once all corrections have been made, click on the submit button at the bottom of the page. This will send an email to the approver to approve the timesheet which will then, once approved, be sent to Payroll for entering.

Can any employee create an Adjustment Timesheet, even a student?

No. Only Approvers in the system such as timekeepers, Deans, or Financial Managers, may turn in Adjustment Timesheets.

Where do I enter time for earnings codes not shown on the form, such as Bereavement Leave?

Any earnings code that may be adjusted is listed in the drop-down list on the form. Simply select the correct earnings code and adjust the hours for that particular code.



QUESTIONS?

Post-Award Foundation Accounts



Terrice Watson, Research and Innovation

Post-Award – Foundation Account Types

- Scholarships – Foundation Budget established in Post-Award and the Scholarship Office – Index Starts with a 5.
- Ledger 4 – Foundation Salaries – Index Starts with a 4.
- Ledger 5 – Foundation Budget established in Post-Award – Index Starts with a 5.
- Employee Awards – Payroll Request/Foundation Budget Request – Departmental Index.
- All Foundation Accounts are billed quarterly.

Scholarships: Foundation Accounts

- Scholarship accounts have a Foundation Budget established in Post-Award and the Scholarship Office – Index Starts with a 5.
- Upon receiving a scholarship's budget information, Post-Award will establish a revenue and expense budget for each scholarship.
- Departments should monitor University (U) and Foundation (F) account balance in connection with scholarship award budget.

Ledger 4: Foundation Accounts

- Ledger 4 accounts are Foundation Supplement Agreements – Index Starts with a 4.
- A new index and fund are created, and budgets are established or revised upon written notification from the Foundation.
- Based on established salary budget, benefits are paid by the University.

Ledger 5: Foundation Accounts

- Ledger 5 accounts have a Foundation Budget established in Post-Award – Index Starts with a 5.
- Upon receiving budget information for a Foundation, Post-Award will establish a revenue and expense budget for each account.
- Departments should monitor University (U) and Foundation (F) account balance in connection with scholarship award budget.

Employee Awards – Foundation

- Submit a UofM Foundation Account Budget Request with University Index and Employee Awards (Account code 61602).
- Upon receiving a memo from the Foundation, Post-Award will establish a revenue and expense budget for the award payment in E&G department account.
- Employee Awards are disbursed through University Payroll via the Employee Award Payment Request. (Include Foundation Fund Name and Fund Number on the form.)
- Post-Award reviews and approves prior to payroll disbursement.
- After payroll processing, the expenditure will be included on the quarterly invoice to the Foundation.

Post-Award – Foundation Accounts

Key Takeaways

- Understand the type of accounts you have.
- Monitor the established budget and requests submitted.
- Accounts are billed to the Foundation quarterly.

QUESTIONS?

Vendor Payment Transmittal Form



Christie Ransom, Asst Manager of Accounts Payable

Vendor Payment Transmittal Form Benefits



- The vendor transmittal form was implemented on May 1, 2023, to achieve maximum accountability of documentation submission via etrieve.
- Saves time and eliminates communication gaps between Accounting and departments.
- Users can automatically push completed electronic forms (pdf or word) documents through a predetermined workflow to a receiver.
- Increases workflow visibility, so you always know what, when and who sent/received a form.
- Provides a clear detailed history path of invoice submission.
- Ensure users receive e-mail notifications when a form is being routed and processed.

Accessing the Vendor Payment Transmittal Form



- The Transmittal Form can be accessed through mymemphis Finance Tab

The screenshot shows the myMemphis website interface. At the top left is the University of Memphis logo. Below it is a dark blue header with the word "FINANCE" in white. A navigation bar below the header contains links for "myMemphis", "Home", "UofMOnline", "Employee", "Finance" (which is highlighted in a dark blue box with yellow text), and "Workflow". Below the navigation bar, the main content area is titled "Travel, Expense, and Vendor Payments". Under this title, there are three links: "Vendor Payment Transmittal Form" (highlighted with a yellow background), "Chrome River Travel and Expense", and "Chrome River Travel & Expense TEST System".

Accessing the Vendor Payment Transmittal Form



- The Transmittal Form can be accessed through mymemphis Finance Tab

The screenshot displays the myMemphis website interface. At the top left is the University of Memphis logo and name. Below it is a dark blue header with the word 'FINANCE' in white. A navigation bar contains links for 'myMemphis', 'Home', 'UofMOnline', 'Employee', 'Finance' (highlighted in a blue box), and 'Workflow'. The main content area is titled 'Travel, Expense, and Vendor Payments' and lists three items: 'Vendor Payment Transmittal Form' (highlighted in yellow), 'Chrome River Travel and Expense', and 'Chrome River Travel & Expense TEST System'.

Accessing the Vendor Payment Transmittal Form



- You will likely be prompted to log in using your Memphis single-sign on credentials and to confirm with Duo. The form will appear as follows:

A screenshot of the eFrieve | CENTRAL web application. The interface is divided into three main sections. On the left is a navigation sidebar with categories like 'Flow', 'Forms', 'Drafts', 'Reports', and 'Inbox'. The 'Forms' section is expanded, showing a list of various forms such as 'Accounts Payable', 'Vendor Payment Transmittal', 'CAES', 'Conditional Enrollment Agreement', 'CCFA', 'CCFA - Request for Absence or Re...', 'CFD', 'Records Disposal and Authorization', 'COE', 'COE - Mentor Contract', 'COE - Mentor Contract (Fall 2023)', 'College of Health Sciences - Internships', 'CHS - Agency Acceptance of Stud...', 'CHS - Student Internship Applicati...', and 'COMM'. The main content area displays the 'Vendor Payment Transmittal' form. At the top, it states 'The processing period for payment requests is 7 to 10 business days.' Below this, there are input fields for 'Originator Name' (filled with 'Christie S. Ransom'), 'Email' (filled with 'csransom@memphis.edu'), and 'Phone'. A 'Date' field is set to '8/14/2024'. There are several buttons for actions: 'Request a New Vendor UID?', 'Find a Vendor's UID?', 'Locate Vendor Invoice #?', and 'Find PO#?'. The form is organized into sections: 'Vendor Information' with fields for 'UID' (filled with 'U00955008') and 'Name' (filled with 'TJT Enterprise LLC'); and 'Payment Information' with a dropdown menu for 'Is there a Purchase Order associated with the invoice?' set to 'No'. At the bottom, there are icons for 'Submit', 'Attachments', 'Download', and 'Print'.

Vendor Payment Transmittal Form Requirements



UofM etrieve user should always review the following information before the completed electronic form is submitted for payment processing.

- UID number
- Purchase Order & Tiger buy receipt number
- FOAPAL
- Attachments
- Financial Manager or Designee Signature
- Hold Check for Pickup **Yes** or **No**

The screenshot shows the 'Vendor Payment Transmittal' form from the University of Memphis. The form includes the following sections and fields:

- Header:** University of Memphis logo and title 'Vendor Payment Transmittal'.
- Processing Note:** 'The processing period for payment requests is 7 to 10 business days.'
- Originator Information:** Fields for Originator Name (Christie S Ransom), Email (cransom@memphis.edu), Phone, and Date (01/14/2024).
- How Do I...:** Action buttons for 'Request a New Vendor UID?', 'Find a Vendor's UID?', 'Locate Vendor Invoice #?', and 'Find PO#?'
- Vendor Information:** Fields for UID (U00935080) and Name (TJT Enterprises LLC).
- Payment Information:** A dropdown for 'Is there a Purchase Order associated with the Invoice?' (set to 'No').
- Invoice and Amount:** Fields for Vendor Invoice # (01234) and Payment Amount (\$ 500.00).
- FOAPAL:** A dropdown for 'Is the cost split over multiple FOAPAL?' (set to 'No').
- Accounting:** Fields for Index (262200), Fund (110001), Organization (511000), Account, Program (4600), and Activity.
- Form Submission:** An 'Add Comments' button and a list of items that can be submitted for payment: Invoice, Check Request, Payment to Contractors (Includes Honorarium), Research Participants, Cash Reimbursement- Student / Guest, Meal Reimbursement-Student / Guest, and Stipend (Non-University Student Only).
- Disclaimer:** A note stating that all forms need supporting documentation and an approval signature from the financial manager or designee.
- Hold Check for Pickup:** A dropdown menu (set to 'No').
- Footer:** 'Revised: 05-2023', 'An Equal Opportunity/Affirmative Action University', and 'UPT:'.

Vendor Payment Transmittal Form Supporting Documents



- Please upload the invoice and or the below forms with an approval signature from the financial manager or designee. The signature is needed along with supporting documents for payment processing.

List of items that can be submitted for payment:

- Invoice
 - Check Request
 - Payment to Contractors (Includes Honorarium)
 - Research Participants
 - Cash Reimbursement-Student / Guest
 - Meal Reimbursement-Student /Guest
 - Stipend (Non-University Student Only)
-
- All forms need supporting documentation attached to the Vendor Payment Transmittal Form. If your request does not have a purchase order number and receipt number an approval signature from the financial manager or designee is needed on the invoice or form.
-
- Please submit one (1) Vendor Payment Transmittal Form per request.

Vendor Payment Transmittal Form Workflow History



- UofM user will have a clear detailed history path of their form being received, completed, returned or declined via e-mail.
- A received form is indicated via e-mail to Accounting that a vendor payment was submitted.
- A returned form indicates that additional information is needed from AP eliminating the need to manually re-key submitted information.
- A declined form indicates that a form submission doesn't comply with UofM policy or AP retrieve form requirements and can't be resubmitted.
- An automatic e-mail is sent to the originator of the form once their request is completed. Example below:

The vendor payment transmittal requesting payment for U00004989 WW Grainger Inc, invoice check request 67854, is in the Accounts Payable queue for processing. Please reference document I0882775 for proof of payment.



Questions?

Reporting Emergency Leave...or Not

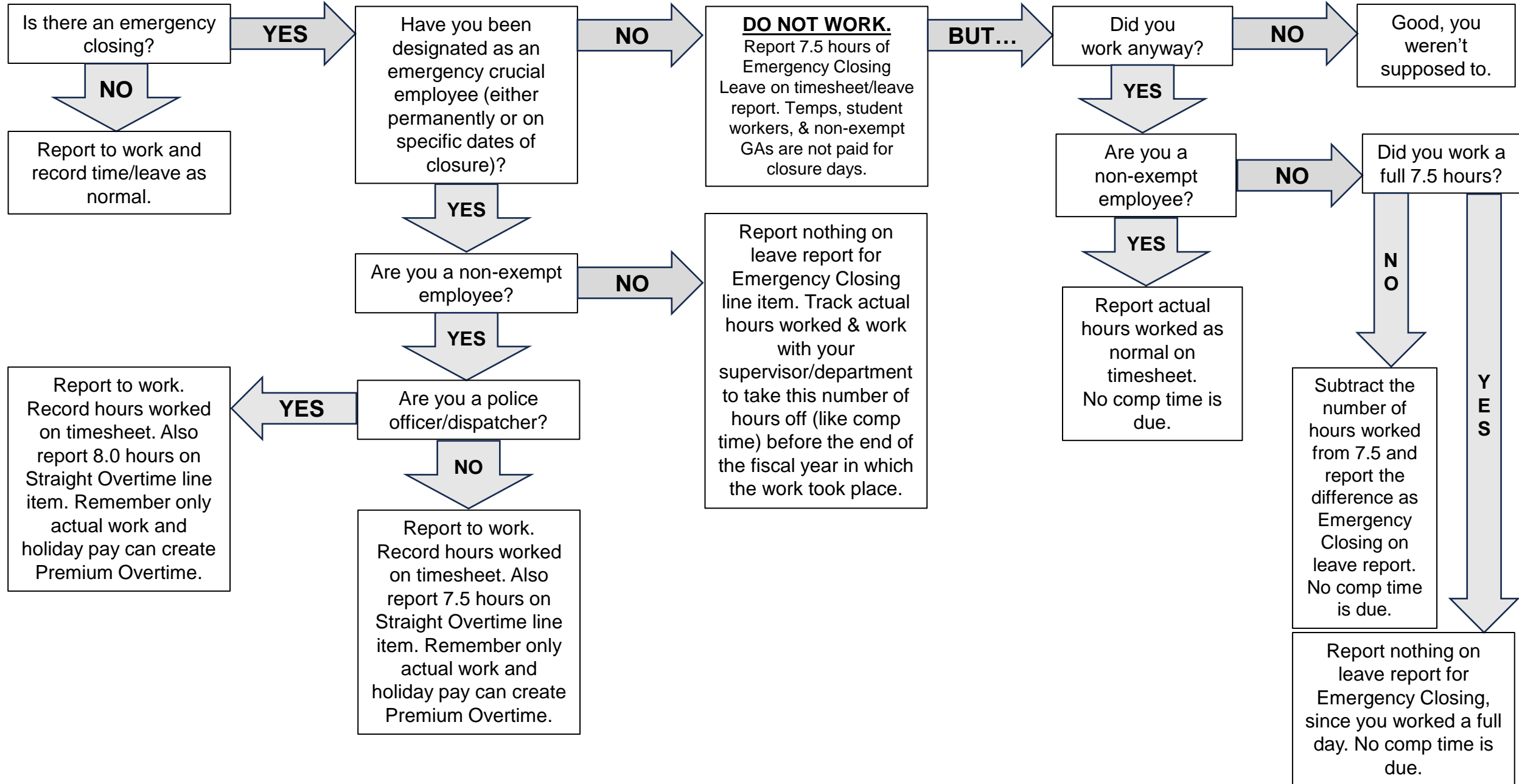


Danny Linton, Associate Director, Human Resources



Reporting Emergency Leave...or Not

- With the inclement weather causing several days of emergency closures of the University, there were many, Many, **MANY**, **MANY** questions about how employees were to report their time & leave.
- Human Resources e-mailed the campus with guidelines on how to handle working—and not working—during these closures.
- Still have questions? This flowchart should answer your issues.
- Remember, policies and procedures can always change in the future.



Is there an emergency closing?

YES

NO

Report to work and record time/leave as normal.

Have you been designated as an emergency crucial employee (either permanently or on specific dates of closure)?

NO

DO NOT WORK.
Report 7.5 hours of Emergency Closing Leave on timesheet/leave report. Temps, student workers, & non-exempt GAs are not paid for closure days.

BUT...

Did you work anyway?

NO

Good, you weren't supposed to.

YES

Are you a non-exempt employee?

NO

Did you work a full 7.5 hours?

NO

Subtract the number of hours worked from 7.5 and report the difference as Emergency Closing on leave report. No comp time is due.

YES

Report nothing on leave report for Emergency Closing, since you worked a full day. No comp time is due.

Are you a non-exempt employee?

NO

Report nothing on leave report for Emergency Closing line item. Track actual hours worked & work with your supervisor/department to take this number of hours off (like comp time) before the end of the fiscal year in which the work took place.

YES

Are you a police officer/dispatcher?

YES

Report to work. Record hours worked on timesheet. Also report 8.0 hours on Straight Overtime line item. Remember only actual work and holiday pay can create Premium Overtime.

NO

Report to work. Record hours worked on timesheet. Also report 7.5 hours on Straight Overtime line item. Remember only actual work and holiday pay can create Premium Overtime.

Report actual hours worked as normal on timesheet. No comp time is due.



Questions?



Announcements & Deadlines



Danny Linton, Associate Director – HR



Announcements & Deadlines

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



Announcements & Deadlines

NEW HR EMPLOYEE

- Charlie Cordero, HR Service Center Associate

NEW HR PROMOTIONS

- Charlena Brassell & Kiana Holley, HR Business Partners
- Andrea Spencer, Leave Specialist



Announcements & Deadlines

- Remember 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

SPRING BUDGET: KEY DATES

- **Revenue Projections ~ Due Friday, March 15, 2024**
 - Email with instructions will be sent out Friday March 01, 2024
 - If you desired, you may schedule a time for individual review with a Financial Planning Staff member
 - Tuesday, Mar 5th thru Friday Mar 8th
 - Instructions for preparing revenue budget revisions can be found on the Financial Planning website under the Frequent Asked Question tab
- **Capital/R&R/Facility Projects ~ Due Monday, March 25, 2024**
 - If a Summer project is planned, submit by Spring deadline



Announcements & Deadlines

SPRING BUDGET: KEY DATES

- Expenditure & Position PDF Budget Revisions ~ Due Monday, March 25, 2024
 - Email with instructions will be sent out Friday Mar 01, 2024
 - Submit revision to cover any newly hired Limited position and those FY24 Limited positions that have not been covered previously
 - 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 FY25
- BD4 Online Budget Revisions ~ Due Friday, April 5, 2024 with all approvals
 - Remember to align department budgets for the remainder of FY24
 - No functional changes after deadline



Announcements & Deadlines

REVENUE PROCESS

- Revenues are updated each budget cycle (Spring & Fall)
- Accessed via Financial Program Guide – revenue budget reviews
- 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)
- Eliminated the Revenue Certification Process
 - FYBR001 ePrint report will continue to run for analysis review
- In the Spring you need to review current year and base for the next fiscal year
- Estimates & future projections should be realistic to reflect the activity you expect
- Return revenue pdf Budget Revisions to Financial Planning
 - (Note, Academic Affairs units return to the Provost Office)

UTILITIES & REPORTS
budget overexpenditures
revenue budget reviews
e-Print



Announcements & Deadlines

BUDGET REVISION PROCESS

- 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 “inbox” email address: FPRevisions@memphis.edu.
 - (Academic Affairs units to submit to Provost Office first)
 - (Auxiliary units to submit to Colis Chambers – cchambrs@memphis.edu)
- Please direct all questions to budget@memphis.edu.



Announcements & Deadlines

What are functional totals?

Budget & Expenditure totals in a specific range of Program Codes

Program Code Range	Function
2000 - 2499	Instruction
2500 - 2699	Research
2700 - 2799	University Libraries Research
3000 - 3499	Public Service
3500 - 3999	Academic Support
4000 - 4499	Student Services
4500 - 4799	Institutional Support
5000 - 5499	Operations and Facilities
5500 - 5799	Scholarship / Fellowships
6000 - 6999	Transfers
7000 - 7999	Auxiliary

Source: FGRPRGH Program Hierarchy Report



Announcements & Deadlines

SPRING BUDGET: FRINGE BENEFIT RATE

- **Benefits FY25 Proposed Fringe Rate (To be Finalized in May)**
 - 36.82% Salaried Employees
 - 42.17% Hourly Employees
 - 6.93% Temp Employees – With and Without Insurance
 - 0.97% Student / GA - Biweekly
 - 4.96% Student / GA - Monthly

- **Benefits FY24 Fringe Rate**
 - 30.61% Salaried Employees
 - 33.43% Hourly Employees
 - 7.20% Temp Employees – With and Without Insurance
 - 1.38% Student / GA – Biweekly and Monthly



Announcements & Deadlines

Separation & Clearance

- Please remember to immediately complete an online separation notice for any employee in your area that is departing the University!
- Not doing so places the University at risk because the employee would still have system access and could lead to an audit finding.
- Keep in mind it is HR's practice to process clearances closer to the date of separation so that leave balances can be accurately calculated for payouts. Therefore, if you submit a clearance far in advance, it may not be immediately processed.
- <https://umwa.memphis.edu/sep-clear>



Announcements & Deadlines

- PLEASE make sure that all leave reports for your department are submitted and approved each month!
- This includes all exempt staff and faculty employees.
- Leave reports are due by the 10th of the month following the month being reported.
- Remember to put at least one “0” on any one date for one leave category (such as Annual Leave) in any month in which no leave was used.



Announcements & Deadlines

- Faculty performance appraisals evaluating performance in 2023 kicked off in WorkforUM on January 2, 2024. Faculty appraisals for 2022 closed (forever) in December 2023.
- Staff performance appraisals in SAMS are due April 30, 2024 for all non-probationary staff employees. Supervisors will now be able to choose from five performance ratings instead of three. Trainings related to this topic are available in Learning Curve.
- Keep in mind that assistant & associate deans are to be evaluated in SAMS, not in WorkforUM, due to the primarily administrative nature of their job duties.



Announcements & Deadlines

Upcoming Dates for Records Retention

- Annual Shred Day: March 7, Main Campus | Time: TBA
- Training:
University Records Management - Records Destruction 101
February 28, 10am via Zoom



Announcements & Deadlines

Next Effective Search Committees training:

- March 14, 2023, 10am
- Sign up in [Learning Curve!](#)



Announcements & Deadlines

Next WorkforUM training:

- April 24, 1:30pm in AD177B
- Sign up in [Learning Curve!](#)



Announcements & Deadlines

Form I-9 Information

- Appointments not needed during regular business hours.
- Visit 178 Administration Building, M-F 8-4:30.
- HR is also offering online appointments by contacting i9@memphis.edu.
- Other questions? i9@memphis.edu



Announcements & Deadlines

- The Office of First Generation Student Success is searching for items to replenish the Career Closet. They are in need of extra small and small women's sizes tops and bottoms, small men's size button downs/polo-style shirts, blazers and suit jackets, and men's pants for tall gents.
- Donations accepted Monday-Friday from 9am-3pm in 301 Mitchell Hall, or leave in the box outside the office.



Announcements & Deadlines

- Career Services is hosting the Spring All Majors Career Fair on March 20 from 10am-3pm in the UC Ballroom.
- The Career Fair is open to all current students and alumni, so help spread the word!



Announcements & Deadlines

- Congratulations to all of this year's Career Milestone Award recipients!
- Pictures & a ceremony recording can be viewed [online](#).



Announcements & Deadlines

- The University will no longer offer Zoom after August 12, 2024. Plan to use Microsoft Teams as an alternative.
- Focus on Finance & HR will continue to use Zoom until the current cycle of meetings concludes in June 2024.



Thank you for attending!

Next Meeting: March 19, 2024 @ 2:30pm

Recordings & presentations available at memphis.edu/focus