FOCUS ON FINANCE & HR

March 17, 2026

AGENDA

- Accounts Payable Updates
- Budget Updates & Reminders
- HR Updates & Reminders
- Announcements & Deadlines

Accounts Payable Updates

Christie Barfield, Accounts Payable

Overview

- Invoice Submission Process
- Required Information
- Formatting Standards
- Email Guidelines
- Key Reminders

Invoice Submission Process

Submitting Invoices through Intelligent Document Recognition (IDR)

- All invoices must be emailed to apinvoice@memphis.edu for centralized processing.
- The Intelligent Document Recognition (IDR) tool automatically scans and extracts key invoice details such as vendor name, invoice number, dates, line items, and totals.
- IDR reduces manual entry but depends on clear, typed information for accuracy.
- Once scanned, invoices are transferred into Oracle. An Accounts Payable team member will review, audit, and validate it for payment.
- Any missing or unclear information prevents the invoice from moving forward and may require manual intervention.

Required Invoice Information

Information Needed for Proper Routing and Processing

To ensure accurate and timely processing, each invoice must include **one** of the following:

- Option 1: Chart of Accounts (COA) Coding
  - Must include all required segments (e.g., Fund, Org, Account, Program, Activity, etc.).
  - Ensures the invoice routes correctly for departmental approval.
  - Missing segments will cause workflow stoppages.

- Option 2: Project and Task
  - Must include Project, Task and Expenditure Type (e.g., A260007 01 74250-Supplies).

- Option 3: Purchase Order (PO) Number + Receipt Number
  - Required for all PO-based purchases.
  - The receipt must be entered in Oracle before the invoice is submitted.
  - Missing receipts or mismatched quantities will prevent the invoice from matching to the PO.

Why This Matters

Without COA coding, Project and Task, or PO/receipt information, Oracle cannot determine where to route the invoice, delaying payment and requiring manual follow-up.

Invoice Format Requirements

Standards for IDR to Successfully Read Your Invoice

- All invoice information must be typed, including vendor name, invoice number, dates, and line item descriptions.
- Handwritten notes, coding, or corrections cannot be read by IDR and will not transfer into Oracle.
- Ensure all documents are scanned clearly. Blurry, angled, or shadowed images reduce recognition accuracy.
- Avoid photos of invoices taken from mobile devices unless high quality and clearly legible.
- Supporting documents such as quotes or delivery tickets must also be clear and typed if they contain critical information.

Why Format Matters

Clean, typed invoices reduce exceptions, speed up processing, and ensure accurate data extraction.

Email Submission Guidelines

Best Practices When Emailing Invoices

- Send only one request per email.
  - Each invoice must be processed individually.
  - Do not attach multiple PDFs or multiple invoices in a single document; IDR will not properly separate them.
  - Submitting multiple documents in one email can cause:
    - Failed invoice generation
    - Data being extracted to the wrong invoice
    - Delays in processing

- Do not submit duplicate requests.
  - If you resend an invoice, the system may create two entries, requiring manual cleanup and delaying payment.
  - Use a clear subject line—for example: "Vendor Name – Invoice Number – PO or COA"
  - Include all required backup documentation in the same email as a single combined PDF, when appropriate.

Key Reminders

Critical Points to Ensure Smooth Processing

- Send all invoices to apinvoice@memphis.edu (no personal inboxes).
- Include complete COA coding, Project and Task, or a valid PO number and receipt.
- Ensure all invoice information is typed and clearly legible.
- Submit one invoice per email—avoid multiple attachments.
- Do not duplicate submissions; email only once unless instructed.
- Confirm vendor is set up in the system—no vendor = no payment.
- Ensure the invoice is a true vendor invoice (not a quote or statement).

QUESTIONS?

Budget Updates & Reminders

Madison Ellison, Financial Planning & Analysis

Spring Budget Cycle

Spring Budget Cycle: FY26 Estimated Budget

- With our transition to Oracle, the spring deadlines have been adjusted.
- We will begin the spring cycle by first asking departments to finalize their plans for their FY26 budgets
    - This includes base and temporary budget adjustments to best align a unit's revenues and expenses to finish out FY26.
    - Departments have until Friday April 3rd to update their FY26 budgets for any revenues and expense estimates.
- We will end any FY26 base adjustments after that date.
- Beginning Monday April 6th, department users can begin entering adjustments into the FY27 budget year

Spring Budget Cycle

Spring Budget Cycle: FY27 Projected Budget

- Beginning Monday April 6th, department users can begin entering adjustments into the FY27 budget year
    - This includes base and temporary budget adjustments to best align a unit's projected revenues and expenditures for FY27
    - Departments have until Friday April 17th to update their FY27 budgets for any base revenue and expense estimates
- After the deadline, department users can still complete FY27 budget adjustments; however, they will not make our state budget submission

Spring Budget Cycle

Spring Budget Cycle: Budget Adjustments

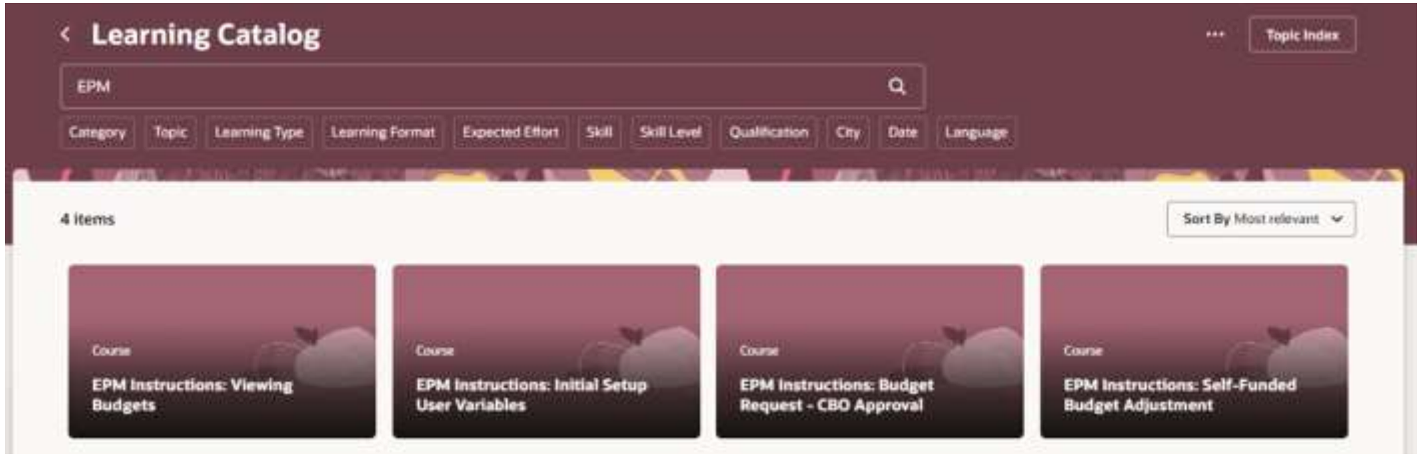
Please see the chart below to help guide you on when certain budget adjustments will be allowed during the upcoming budget cycle:

	FY26 Budget Year			FY27 Budget Year		
Period	Self-Funded Budget Adjustments	CBO Approval Budget Request		Self-Funded Budget Adjustments	CBO Approval Budget Request	
	Current Year	Base	Current Year	Current Year	Base	Current Year
Mar 16 - Mar 20	Yes	Yes	Yes	No	No	No
Mar 23 - Mar 27	Yes	Yes	Yes	No	No	No
Mar 30 - Apr 3	Yes	Yes	Yes	No	No	No
April 6: Open New Fiscal Year for Budgeting Purposes						
Apr 6 - Apr 10	Yes	No	Yes	Yes	Yes	Yes
Apr 13 - Apr 17	Yes	No	Yes	Yes	Yes	Yes
Apr 20 - Jun 30	Yes	No	Yes	Yes	Yes	Yes
July 1: Begin New Fiscal Year						
Jul 1 - Jul 15	No	No	Yes	Yes	Yes	Yes
Jul 15 +	No	No	No	Yes	Yes	Yes

Spring Budget Cycle

Spring Budget Cycle: Meeting with Financial Planning

- Financial Planning will be available for individual meetings March 30th through April 10th. Please email budget@memphis.edu to schedule a time.
- Reminder: Oracle Fusion Budget (EPM) trainings are available through Oracle Learn
  Oracle Fusion > **Me** > **Learning** > **Learning Catalog** (at bottom) – **Search the Catalog** > **Select the training you want** > **Enroll** > **Launch**.



Oracle Fusion Budget (EPM)

Oracle Fusion Budget (EPM): Budget Adjustments

- A few reminders for budget adjustments within EPM:
  - Line-item details are to only be used when making a Self-Funded Budget Adjustment, NOT on a CBO Approval Budget Request
  - Self-Funded Budget Adjustments require line-item details and users are recommended to use meaningful descriptions on each line item added

    Example: MTE 03.17.2026 Travel for D. Keeney SACUBO Conference

  - Self-Funded Budget Adjustments that are finalized in EPM will be available for consumption through requisitions or pre-authorizations the following day.
  - CBO Approval Budget Requests that are through all levels of approval will be available for consumption through requisitions or pre-authorizations the following day.

Oracle Fusion Budget (EPM)

Oracle Fusion Budget (EPM): Budget Adjustments

- When to use Self-Funded Budget Adjustment or CBO Approval Budget Request?
  - Self Funded Budget Adjustments are to be used when a department user is moving current year (temporary) expense budget within the same Fund and Organization to a different expense account code or to a different program code
    - Moving budget from operating to cover travel
    - Moving budget from instruction to research
  - CBO Approval Budget Requests are to be used in all other scenarios
    - Adjusting base budget
    - Adjusting revenue budget
    - Moving budget from one org to another
    - Moving budget from one fund to another

Position Budgeting

Oracle Fusion (HCM): Position Budgets

- If a department is hiring for a position for which the employee will start in the fall and they know they will be hiring for a particular amount, please go ahead and adjust the position budget by submitting a position change action and choose a date of July 1 or the known hire date.

Budget Checking for FY27

Oracle Fusion: Funds Warning

- Users have been receiving a failed funds check if inputting travel authorizations that have a start or end date after July 1, 2026.
- We will soon update the budget checking to be advisory for all travel while we complete our FY27 planning cycle
- Users will then be able to submit pre-authorizations for travel crossing into FY27
- Department users should closely monitor their FY26 budgets and appropriately plan these travel expenses as they will not receive a failed funds check if over budget
- Budget checking will be turned back on for travel in early April

QUESTIONS?

Please email budget@memphis.edu or join us during Oracle Office Hours, Mondays & Wednesdays 2-4pm thru the end of March.

HR Updates & Reminders

Danny Linton, Human Resources

HR Updates & Reminders

- Faculty Performance Appraisals are underway and should be completed by the end of the Spring 2026 semester.
- Staff Performance Appraisals
  - The is the last time staff will be evaluated in the legacy SAMS system. Staff appraisals are due April 30, 2026, as usual. Training sessions are available in Oracle Learn (“Staff Appraisals Made Simple”).
  - Beginning in May 2026, staff appraisals will shift to Oracle and move to a new format.
    - Supervisor can set goal plans for employees that cover the entire evaluation period (May 1 thru April 30).
    - Employees may submit self-evaluations.
    - Staff employees will be evaluated in three realms of competencies:
      - Common factors related to the strategic plan for all staff positions
      - Job-specific factors (e.g. all Administrative Associates)
      - Position-specific factors (e.g. a specific Administrative Associate)
    - Training on the new Oracle staff performance appraisal process will be announced soon, including online training.

HR Updates & Reminders

- Direct Hire Updates
    - One Time Pays are to be used only for Student Workers and Temporary Employees (and potentially Graduate Assistants in some cases). They are NOT to be used for regular employees!
    - If using a One Time Pay, you MUST choose One Time Pay as the Job Type and the Salary Basis.
    - For now, be sure to enter (at least) a three-day period from your Begin & End Dates that includes **at least one day of the payroll you are trying to use**. If needed, list actual service dates in the Comments section if the service dates do not fall within that payroll's period.
    - As with all direct hires, be sure to complete all required fields in order to avoid your contract being rejected or erroring out.

HR Updates & Reminders

- Direct Hire Updates
  - DATES DATES DATES! In Oracle, it is important to understand the way hiring dates work.
  - If you are appointing someone who has ONLY inactive assignments, the begin date on any new job can only start one day (or more) AFTER their most recent termination date. EXAMPLE: All old jobs ended on 1/31…first day a new appointment can start is 2/1.
  - If you are appointing someone who DOES have an active assignment or assignments, you cannot start an additional assignment for any date prior to the start date(s) of those current assignments. The direct hire system is being improved to do more error checking so it can stop you from proceeding if you select a date that ultimately won't be usable.
  - If a direct hire is flagged as an "Add Assignment," the transaction must be approved by all parties by the end date of the appointee's current assignment. This deadline is now reflected on the contract itself. (Otherwise it will need to be entered again as a Rehire.)

HR Updates & Reminders

- Direct Hire Updates
  - The Direct Hire Transaction Table includes every contract entered and its status (including rejections and errors). The main Oracle screen can be difficult to navigate.
  - Use the Export button in the top right to download an Excel document listing all transactions. This Excel file is also quite large but use your filters to help find the data you need.
  - HR is working with IT to potentially develop a new, more user-friendly way to look up this data…stay tuned.

HR Updates & Reminders

- Direct Hire Updates
  - HR has established a Direct Hires web page at https://www.memphis.edu/hr/directhire.php to address the most common issues with direct hires.
  - This includes a list of error messages from Direct Hires that will explain the sometimes cryptic errors this system generates.

HR Updates & Reminders

- Direct Hire Updates
  - Faculty Summer Compensation (FSC) direct hires are live but won't be used much until a month or so from now.
  - FSC is the only time you'll be doing direct hires on regular employees. You may only do FSC direct hires for your F9 academic year faculty.
  - FSC has many rules to follow, and the direct hire will help track those percentages for you.
  - The system will determine the amount of FSC your faculty member is eligible for and will deduct that amount for every approved contract that gets entered.
  - FSC is entered by the **employing** department in Oracle.
  - Generally, consider June and July as the FSC pay months now that F9 faculty members' regular paychecks cover August thru May. (June and July are deferral payout paychecks.)

HR Updates & Reminders

- Direct Hire Updates
  - Student Workers in Summer
  - The direct hire system will only allow student worker appointments over the summer if that student is also registered for the upcoming fall semester.
  - If they are not registered for the fall, that student will need to be hired as a temporary employee (which requires a background check).

HR Updates & Reminders

- Old WorkforUM site for previously-posted hires: workforum.memphis.edu
- New WorkforUM site for new postings: workforum2.memphis.edu
- Once all postings from the legacy site are dispensed, that site will go away and workforum.memphis.edu will point to the new site.
- Any current University employees should apply to postings in the Opportunity Marketplace within Oracle: **Me** > **Opportunity Marketplace**
- More Recruitment training sessions are being scheduled soon, in multiple formats.
- Issues with Offer Letters: When downloading an offer letter template, it is imperative that the letters remain in RTF - Rich Text Format & are edited in Microsoft Word. That is not the default on most Apple computers!

HR Updates & Reminders

- In Recruiting, when creating an offer for regular staff and faculty members, be sure to use the correct position number in the Position field, especially if you are hiring multiple people under one requisition.

- The field only displays the position name initially, so be sure to click on it to see the position number being used.

HR Updates & Reminders

- Remember to see your payroll advice statement in Oracle, you can navigate to **Me > Pay > My Payslips**.

- It is always a good idea to review your payslip each pay period.

HR Updates & Reminders

- To request an absence in advance, remember you can go to: **Me > Time and Absences > Absence Balance > Add Absence**.
- Click on “Go to application task” to get to the data entry screen.
- You can pick the type of leave you are requesting, then enter the details and it starts an Oracle journey for this task. Your line manager will receive a notification of your request.
- Approved absences will appear automatically on the respective time card. Absences may also be entered directly on the time card if your department handles leave requests outside of Oracle or if you do not know the exact number of hours to request in advance.

HR Updates & Reminders

- Please do not inaccurately report hours worked on a time card just to “catch somebody up” on missed hours.
- The appropriate method for paying hours is to report them on the dates they were actually worked; remember, Oracle allows employees and managers to revisit time cards in the past and edit them for accurate timekeeping.
- It is incorrect to, for example, report 200 hours worked on one time card just to make up for missed time reporting in the past.
- If you have an employee who has unpaid hours in the past that needs to be “caught up,” contact your HR Business Partner for your best method of correcting this issue.

HR Updates & Reminders

- Oracle Learn is live! This is generally considered the replacement for Learning Curve, the online training registration site we have used for years.
- To find a training course, go to Oracle and follow this path:
  Me > **Learning** > **Learning Catalog** > **Enroll**
- Oracle Learn includes 24/7 online trainings, synchronous online trainings, and instructor-led in-person trainings.
- Managers and Learning Administrators may assign required trainings to employees on their end.
- Once a training course is completed, certificates of completion are available & attendance/skills can be noted on an employee's talent profile.

HR Updates & Reminders

- New trainings are coming for direct hires, recruitment, performance appraisals & more.
- Existing trainings currently housed in Canvas will be moved to Oracle Learn in the near future.

HR Updates & Reminders

- The best way to contact HR **with Oracle issues** is **via a helpdesk request**. For everything else, use this chart to help you know the best place to send your message.

HR Group	E-Mail Address	Best To Use For:
HR Managers	hr@memphis.edu	High-level basic guidance for HR issues; should not be used for transactional inquiries. MANY emails that are sent to hr@memphis.edu should instead go to one of the accounts below.
HR Service Center	hrservicecenter@memphis.edu	Transactional inquiries like "Where is my time card?" "What is the status of this direct hire?" "I submitted a document and need to know where it is." "When is my new employee orientation?" Any other basic HR-related questions.
HR Data Management	hrdata@memphis.edu	Requesting special pays and/or retro payments. Confirming service dates. Inquiries about assignments & approvals. Handling employee separations. Other miscellaneous issues related to an employee's record.
HR Business Partners	hrbp@memphis.edu	Broad HR issues that your area's business partner would need to help you with, specific to your division/department.
HR I-9 Correspondence	i9@memphis.edu	Help with your own or your employees' Form I-9s.
HR Employee Engagement	engagement@memphis.edu	Help with employee award issues or HR-sponsored campus events.
HR Employee Relations	emprelations@memphis.edu	Help with performance appraisals, HR policies & procedures and/or employee performance.
HR Training & Development	training@memphis.edu	Help with HR-related trainings, LinkedIn Learning, and Oracle Learn.
HR Benefits	benefits@memphis.edu	Help with University benefit issues such as insurance, retirement, educational assistance, etc.

QUESTIONS?

Announcements & Deadlines

Danny Linton, Human Resources

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

- Check your org charts!
- Now that Oracle is live, please review your org charts for accuracy; having the correct line manager is more important than ever.
- If you have changes, you may submit them to HR via a helpdesk ticket (for now) or do a Request for Position Change action in Oracle. You must have the Workforce Structures tiles to do this.

Announcements & Deadlines

- Please be reminded that as of January 1, 2026, there is only one probationary period per staff employee per University employment life cycle.
- The written policy itself is currently being revised to reflect this change.
- Because of this policy change, it is very important that supervisors orient and train their new employees and document any deficiencies.
- Questions? emprelations@memphis.edu

Announcements & Deadlines

- Employees are encouraged to review the University's Out of State Work policy.
- Out of State Work (OSW), whether full-time or part-time, is generally not authorized for University employees, including faculty, staff, Temps and student workers, with the exception of those employees who live within a reasonable commuting distance of their University assigned work location.
- Requests for OSW approval under this policy must meet a compelling business interest or skills-based need. A compelling business interest or skills-based need must be a tangible factor that is essential and supports the University's operational needs and strategic priorities.
- The University will not consider any OSW requests from the following states: California, New York, Nevada, Colorado, Massachusetts, and Washington.

Announcements & Deadlines

- The Alternative Work Arrangements policy has been revised.
- The policy changes primarily deal with whose approvals need to be obtained for both faculty and staff employees, as well as the frequency in which AWAs must be completed.
- For more information about AWAs, please visit this website.

Announcements & Deadlines

Social Security Administration Update

- Employees must make an appointment to get a new Social Security card, replacement, or name change.

Announcements & Deadlines

- 2024 and 2025 Career Milestone Award recipients who were unable to attend their respective ceremonies may pick up their certificates until April 20th to do so.
- HR can send the certificates to Lambuth employees, Law School, etc.

Announcements & Deadlines

- LinkedIn Learning is available for free to all employees!
- Create your own goals and learning paths or assign them to your team.
- Over 15,000 technical and soft skills development opportunities are available!
- You can connect your personal LinkedIn account to your trainings taken at UofM to share what you've learned.
- Available in the MyMemphis portal.
- Keep in mind that LinkedIn Learning is a great resource to use especially on days where the University is under a modified work schedule due to inclement weather or any other reason.

Announcements & Deadlines

What should I do if I am injured on the job?

- If it is an emergency, seek treatment at the nearest emergency room. Contact your supervisor and fill out the Employee Incident Report as soon as possible to begin the claim process.
- In a non-emergency, notify Human Resources & your supervisor immediately of what happened, how it happened, who saw what happened, and if you were injured as a result of the accident. You and your supervisor should then contact the Workplace Injury and First Notice of Loss Call Center at 1.866.245.8588 to speak with a registered nurse who will evaluate the nature of your injury and determine your immediate care or treatment options.

Announcements & Deadlines

What Happens After I Report the Injury?

If no medical treatment is recommended:

- The registered nurse will document the call.
- An incident report will be entered into the reporting system for you and your supervisor.

If medical treatment is recommended:

- The nurse will direct you to the nearest State-approved medical provider.

Announcements & Deadlines

Required Forms and Deadlines

- You and/or your supervisor must complete the First Report of Injury or Illness form.
- The form must be submitted to the Environmental Health and Safety Office:
  - Within 24 hours of the injury whenever possible
  - No later than 48 hours
- Important: If the accident is not reported within 48 hours, the employee's department MAY be fined by the State Comptroller's Office.

Announcements & Deadlines

New Employee Injury Reporting Has Launched!

- The updated reporting system is now live, and all existing links at:
  - https://www.memphis.edu/ehs/report_an_incident will automatically direct you to the new online form.
- In addition to the Employee Injury Report, new online forms are now available for:
  - Near Miss
  - Student Injury
  - Visitor Injury
  - Lab Student Injury
- QR codes will be posted in relevant areas across campus to make reporting quicker and easier.
- Please note: all forms are now fully online and cannot be printed or submitted via email.
- For questions or assistance, contact ehs@memphis.edu or call 901.678.5700.

Announcements & Deadlines

Separation & Clearance

- In Oracle, employees may start their own online separation process by going to **Me** > **Show More** > **Resign from Employment**.

- The resignation action will route to the line manager and then to HR.

- Resignation letters may be attached to these actions.

- Keep in mind, it is HR's practice to process separation/clearances closer to the date of separation so that leave balances can be accurately calculated for payouts.

Announcements & Deadlines

- PLEASE make sure that all time cards for your department are submitted and approved each month!
- All exempt staff and faculty employees will report any leave taken on their time cards.
- All non-exempt employees will report their time worked and leave taken on their time cards. Due dates for non-exempt time cards have not changed.
- Please use the Absences module in Oracle to request leave in advance.
- In Oracle, exempt employee time cards are due by the 20th of the month being reported.
- If changes are needed after the 20th of the month, the employee or line manager may edit timecards after they have been approved.

Announcements & Deadlines

Online Training for *Effective Search Committees*:

- Available 24/7 in Oracle Learn!
- **Me** > **Learning** > **Learning Catalog** > **Enroll**

Announcements & Deadlines

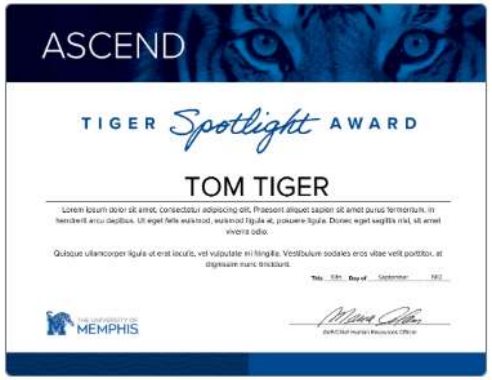
Employee Recognition is Easy With an Updated Tiger Spotlight Award!

- You can recognize staff or faculty anytime with a Tiger Spotlight Award!
- Simply fill out the brief form, select from one of the newly redesigned recognition certificates, and it will automatically be emailed directly to that employee and their supervisor.
- It's a quick and easy way to celebrate someone and let them know you appreciate their work!

A Job Well Done

Successful Outcome for Every Student

Thank You



Ascending

Announcements & Deadlines

Form I-9 Information

- Visit 178 Administration Building, M-F 9:00am - 3:00pm for I-9 assistance. Appointments are not needed during these hours.

- HR is also offering I-9 online appointments by contacting i9@memphis.edu.

- Other questions? i9@memphis.edu

Announcements & Deadlines

- Remember to review the University's current job openings at workforum.memphis.edu and workforum2.memphis.edu as well as in the Opportunity Marketplace in Oracle.
- Follow the Division of Business & Finance on X at @uofmemphisbf!
- Subscribe to our WorkforUM X feed at @umemphisjobs!
- Follow us on Instagram! @uofmhr

See you next month!

Next Meeting: April 21, 2026 at *memphis.edu/fofhr*

Recordings & presentations available at *memphis.edu/focus*