



# FOCUS ON FINANCE & HR

**March 19, 2024**



## **AGENDA**

- Meet the Chief of Police
- MyMemphis Portal Transition
- Fixed Assets/Inventory Confirmation Overview
- Once and For All: How to Calculate Overtime
- Announcements & Deadlines

# Meet the Chief of Police



**Keith Humphrey, Chief of Police**

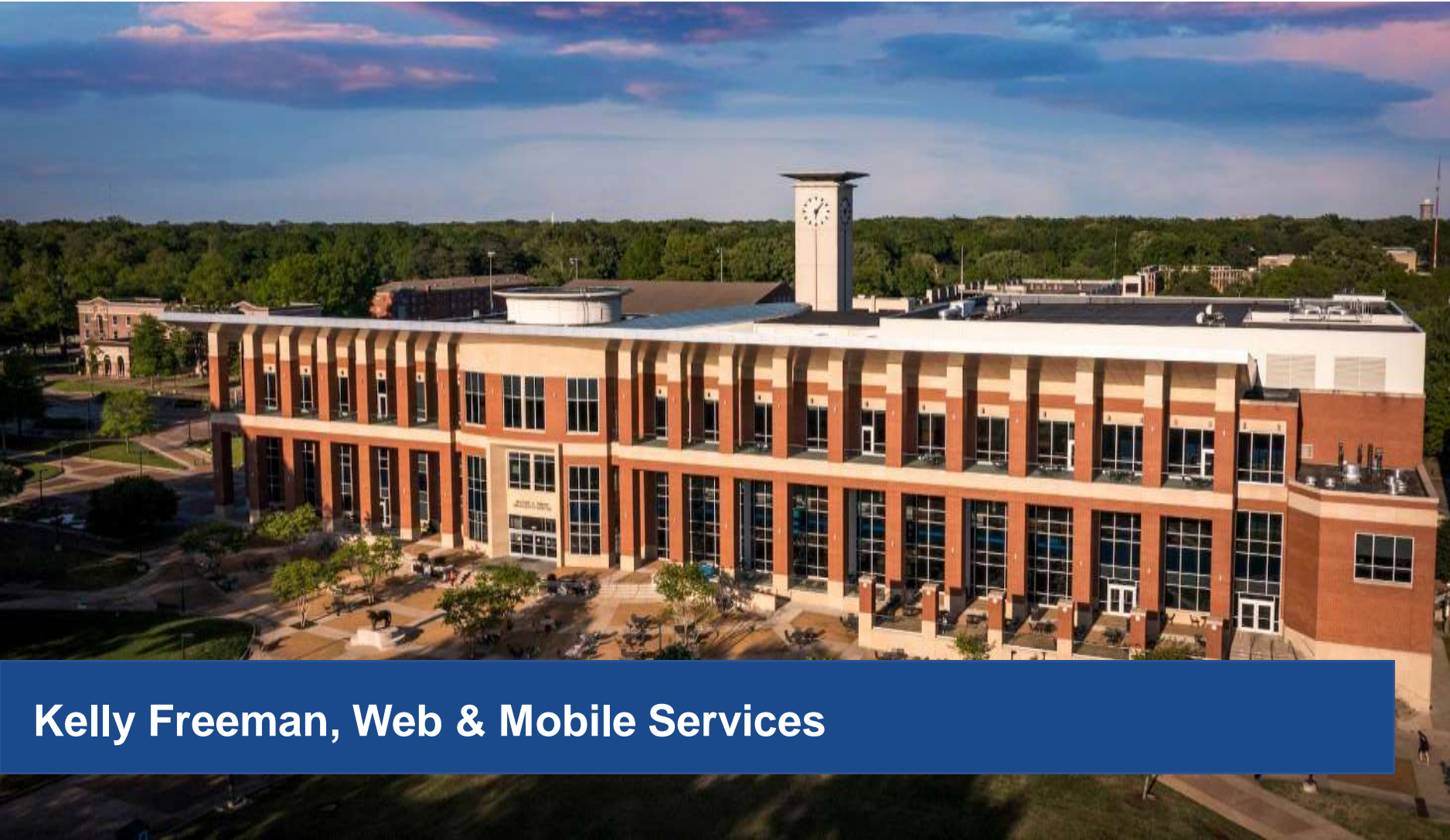


# Meet the Chief of Police



Keith Humphrey

# MyMemphis Portal Replacement



**Kelly Freeman, Web & Mobile Services**



# MyMemphis - Ellucian

- Ellucian Luminis
- 15+ year presence at UofM
- Ellucian is retiring Luminis June 2024
  
- Last year, Ellucian introduced Experience Dashboard
- We evaluated this product – however, several concerns were identified
  - Relatively new and rapidly changing – can be good but also painful for users as functionality/interface change frequently.
  - Lacking core functionality and customization. A portal should be able to aggregate information and access to disparate systems across university. Experience, at this point, is relatively Ellucian-centric in their integrations. Non-Ellucian integrations are labor intensive and potentially fragile – current toolset requires custom applications and APIs to simply replicate our current myMemphis functionality
  - In addition, custom content options are limited, and the native mobile apps are missing some core functionality.



# Experience Dashboard

The screenshot shows a user dashboard for Kelly Freeman (U00238510) at The University of Memphis. The dashboard includes a navigation menu, a calendar, a notification bell, and a user profile icon. The main content area is divided into four panels: Fee Information, Welcome, Registration and Records, and Immunization Requirements.

**Fee Information**

[See Fees](#)

**Please note: If you decide to withdraw completely from the University, you must drop your courses promptly to avoid owing fees by the Fee Payment Deadlines listed below.**

May 2, 2023, First day UofM, TBR, UT, other state colleges and universities, and state employees (PC191) fee waiver participants, students or Senior Citizen Reduced Tuition for Credit (Seniors 65 years old)/Tuition

**Welcome**

Kelly Freeman (U00238510) :: [Sign-up for Duo](#)

Your U-Number is your unique University Identification number. It is also referred to as your University ID, Banner ID, or even your Student ID. Your U-Number is **U00238510**.

Your University username is **knfreman**. A Universal User ID, which is also the first part of your UofM email address, is your username for using UofM

**Registration and Records**

View information on Online Registration, your Registration Status, Class Schedule, Enrollment Verification, Permits and more [here](#) (Ellucian Page)

[UMWA link](#) (UMWA Page)

**Immunization Requirements**

<b>To register:</b>	Complete acknowledgement for Hepatitis B and Meningitis (prompted during registration)
<b>Full time registration:</b>	For students under age 18: Parent/legal guardian must complete <a href="#">Hepatitis B and Meningitis form</a>
<b>TB Skin</b>	2 MMR and 2 Varicella (Chicken Pox) required
	Required for non-U.S. citizens from countries of



# MyMemphis – Ex Libris

- Ex Libris campusM
- Mobile
  - Purchased campusM and rolled out native iOS and Android mobile apps early 2022.
  - Mobile app adoption has been great – especially among students. Fall 2023 averaged 7k+ active users per month with over 300k logins across the entire term.
- Desktops/Browsers
  - campusM has a browser-based web portal using the same platform as the native mobile apps.
  - Single administrative interface.
  - Unified/consistent experience for faculty, staff, and students.
  - More mature product with a growing number of out-of-the-box integrations including Canvas, Banner (student), Microsoft, etc. In addition, and similar to Luminis, also supports integrating existing custom web applications.
- Soft Rollout
  - December 15th, 2023
  - 20k+ logins in first month – including holiday break



# CampusM Portal



The screenshot displays the CampusM Portal interface for Faculty and Staff. The top navigation bar includes the University of Memphis logo and the text 'THE UNIVERSITY OF MEMPHIS'. The main content area is titled 'FACULTY AND STAFF' and features a grid of service tiles. The tiles are organized as follows:

- Row 1: Announcements (with a notification badge), Feedback, Employee, Faculty.
- Row 2: Finance, UofMOnline, Workflow, My Information.
- Row 3: My Dashboard, umMail (with a notification badge), Campus Map, Emergency Info (with a 24-hour service icon).
- Row 4: IAM, Work Requests, Campus Tour, Alumni, Dining.

A banner for 'ANIME AND GAMING AGA' is visible at the bottom right of the page. The left sidebar contains a navigation menu with the following items: Home, Search, My Information, My Dashboard, Employee, Faculty, UofMOnline, Finance, Advising, ITS, and Workflow.



## When is the Switch?

- Soft rollout December 2023
- Both myMemphis portals (Luminis and campusM) will run in parallel through Spring 2024
- We will be increasing communication and visibility - encouraging usage over Spring term
- At the end of Spring 2024 (May), we will redirect my.memphis.edu and myuofm.memphis.edu to the new system

New system: <https://portal.memphis.edu>



# What We're Working On

- Collecting Feedback!
  - Trying to get as many users as possible to try the new system and provide actionable feedback. Approximately 95% of the current users are students, and we'd love to hear more from faculty and staff before everything is more or less finalized
  - Example – we have received feedback regarding the new interface being 'busy'. We are tracking usage and working to identify items that do not need to be shown (or can be hidden by default). campusM provides an 'Arrange' feature which allows users to add/remove/reorganize items in their layout.
- Setting up an introductory webpage outlining features and functionality
- Updating documentation
- Creating a demo/introductory video to demonstrate usage and customizing layouts



**QUESTIONS?**

# Fixed Assets/Inventory Confirmation Overview



**Darya Maksimova, Accountant III, Financial Reporting**



# Policy & Statute Requirements

- Annual Inventory Confirmation is a required procedure: [BF4025 Policy](#)
- On February 22, 2024 the Property Accountant sent Inventory Reports of **capital equipment only** by Organization to Equipment Reps and Financial Managers.
- Beginning July, 2024, an email notification will be sent to Equipment Representatives and Financial Manager as a reminder to complete confirmation of **non-capital and sensitive** equipment.
- Maintaining accurate and up-to-date records of your department's equipment inventory is essential to ensuring proper accountability by the University as a whole.
- Inventory Confirmations are reviewed by State and Internal Auditors as part of their normal audit procedures.



# Fixed Assets Categories

- **“Capital Equipment”** is a single item costing **\$5,000** or more.
- **“Sensitive Minor Equipment”** has a cost more than \$1,500 and less than \$5,000, and is particularly vulnerable to theft. Equipment in this category must be tagged. *(Examples of items that may be viewed as sensitive minor equipment include cameras, computers, audio and video equipment, microscopes, oscilloscopes, and other scientific equipment.)*
- **“Controlled Equipment under \$1,500”** is also considered vulnerable to theft and has been tagged—at the department’s discretion.



# Fixed Assets Categories

**A report of all 3 equipment categories may be obtained from Banner ePrint – Banner Finance Repository – FYFR001-Fixed Asset Inventory Listing.**

Per policy, “departments should take every precaution to safeguard ALL state property, regardless of cost”. Therefore, we **strongly recommend and encourage** responsible parties to inventory and confirm “Sensitive Minor Equipment” and “Controlled Equipment under \$1,500” when confirming “Capital Equipment”. Confirmation of non-capital equipment should be maintained internally by the department. Confirmation of **capital equipment** should be completed and submitted to Accounting.





# Annual Inventory Confirmation Process

1. Print a copy of the Confirmation and read instructions carefully.
2. Physically confirm the location of all equipment listed in the report.
3. If information (asset description, make, model, serial number, etc) is missing or incorrect, update it on the confirmation report, preferably using a **red** pen or font. Any indicated changes of this nature will be updated in Banner by the Property Accountant.
4. If Location is missing or incorrect, initiate the appropriate Fixed Asset Workflow to correct it. (indicate WF on confirmation).
5. If Location is “Off Campus”, confirm that an [Off-Campus Use/Return of University Equipment form](#) has been completed and submitted to the Property Accountant.
6. If the equipment has been transferred to another Organization, initiate the appropriate Fixed Asset Workflow to process the transfer (indicate WF on confirmation).
7. If needed, zero value assets through Fixed Asset Workflow (indicate WF on confirmation).



# Annual Inventory Confirmation Process

8. To add **capital** equipment, complete the [Items in Department Not on Inventory](#) form and send with completed inventory confirmation.
9. Ensure you have a [Off-Campus Use/Return of University Equipment](#) completed for all Off-Campus items (112688 and 112687).
10. You must complete a [Report of Lost or Stolen Property Form](#) and file it with Police Services for all missing/lost/stolen items and ITS if the item is an electronic device. Also, send a copy of the form to the Property Accountant.
11. Upon completion of confirmation of all equipment on the report, forward a copy of the signed confirmation report to Financial Reporting by **March 31, 2024**.



# Annual Inventory Confirmation - Samples

## • Completed Report

Report ID: FYFR001

### University of Memphis Inventory Confirmation Report

Page 1 of 259

Report Run:4/20/2020 12:49:18 PM

Decal	Description	Book Value	Net Value	Make	Model	Serial Number	Acq Date	Location	Locn
<b>Responsible Organization: 100500</b>		<b>University Board Governance</b>							
013344000	EXT60138101-DTP CrossPoint 108	10,233	7,931	Extron	DTP CrossPoint 108	A1JWRQ8	04/10/17	Administration 107	100024
013344500	Media Site ML820 Recorder	9,755	7,723	Mediasite	ML-820	003-5990020	03/14/17	Administration 107	100024

## • Correction Samples

Report ID: FYFR001

### University of Memphis Inventory Confirmation Report

Page 54 of 259

Report Run:4/20/2020 12:49:18 PM

Decal	Description	Book Value	Net Value	Make	Model	Serial Number	Acq Date	Location	Locn
<b>Responsible Organization: 212112</b>		<b>Physics Jingbiao Cui</b>							
013094400	Atomic Layer Deposition System	80,700	44,385	Ensure Scientific Group	Atomic Layer	ABC123456	01/13/15	Manning Hall 420	101186
013094500	Dual Tube Furnace	47,930	25,962	MTI Corporation	Dual Tube Furnace	56984	12/03/14	Manning Hall 420	101186
013094600	correct acct code-I0585734	9,100	4,853	Edwards 306	Vacuum *	XYZ256	11/11/14	Manning Hall 420	101186
013094700	Potentiostat/Galvanostat	5,538	2,907	Gamry Instruments	Potentiostat/Galvanostat	Q15-269	10/29/14	Manning Hall 420	101186
013201600	DXR Raman Microscope, a confocal	49,500	31,762	Thermo	**	714-029900	12/14/15	Manning Hall 420	101186
013559600	Experimenters Kit with 25mm2	16,025	13,621	Amptek	Experimenter's kit	1)	01/08/18	Manning Hall 221	101069

\* Advanced Series A567

\*\* Fisher IV -777

1) 987XWQ268MN





# FFIMAST – Asset Status

To determine System Status Code of the asset, use the Banner INB FFIMAST page. Enter Decal # (Asset Tag), click on **Go**

- Active Status – System Status Code “J” or “I”.

Fixed Asset Master Query FFIMAST 9.3.16 (PROD)

Asset Tag: 014153000

**MASTER INFORMATION**

Origination Tag	T00148377	Permanent Tag Date	12/14/2020
Permanent Tag	014153000	Last Adjustment Date	
Primary Tag	<input type="text"/>	Origination Tag	
Subordinate Type		Cancel Date	
Origination Tag Date	12/14/2020	System Status Code	J Source Journal Voucher
Asset Description	Worstation Standard	Asset Type	FR Furniture



# FFIMAST – Asset Status

- Inactive Status - Assets that were previously zero-valued, cannibalized, or disposed are indicated by “D” or “C” (not included in the Report).

Fixed Asset Master Query FFIMAST 9.3.16 (PROD)

Asset Tag: 012531100

MASTER INFORMATION			
Origination Tag	T00117652	Permanent Tag Date	02/27/2012
Permanent Tag	012531100	Last Adjustment Date	01/27/2021
Primary Tag	<input type="text"/>	Origination Tag	
Subordinate Type		Cancel Date	
Origination Tag Date	01/04/2012	System Status Code	D
Asset Description	Apple Mac Pro, Two 6-Core Intel Xeon	Asset Type	CP Computer and Peripheral Equipment



# FFIMAST - Organization

To determine in which org the asset belongs, use the Banner INB FFIMAST page. Enter Decal # (Asset Tag), click on **Go**, and then, click on the down arrow in the bottom left of the screen 2 times.

The screenshot shows the Banner INB FFIMAST page with the following data:

PROCUREMENT INFORMATION			
Origination Tag	T00147302	Permanent Tag	014108400
Vendor Code	U00560005 Formlabs	Submission Number	0
Purchase Order	P0279077	Invoice Item	2
Purchase Item	2	Cancel Date	
Receiver		Credit Memo	No
Receiver Date		Installments	
Invoice	TB230984	Recurring	
Invoice Date	09/25/2020		

Other Source Data			
Document		Document Tag Date	
Type		Source Submission	
Sequence			

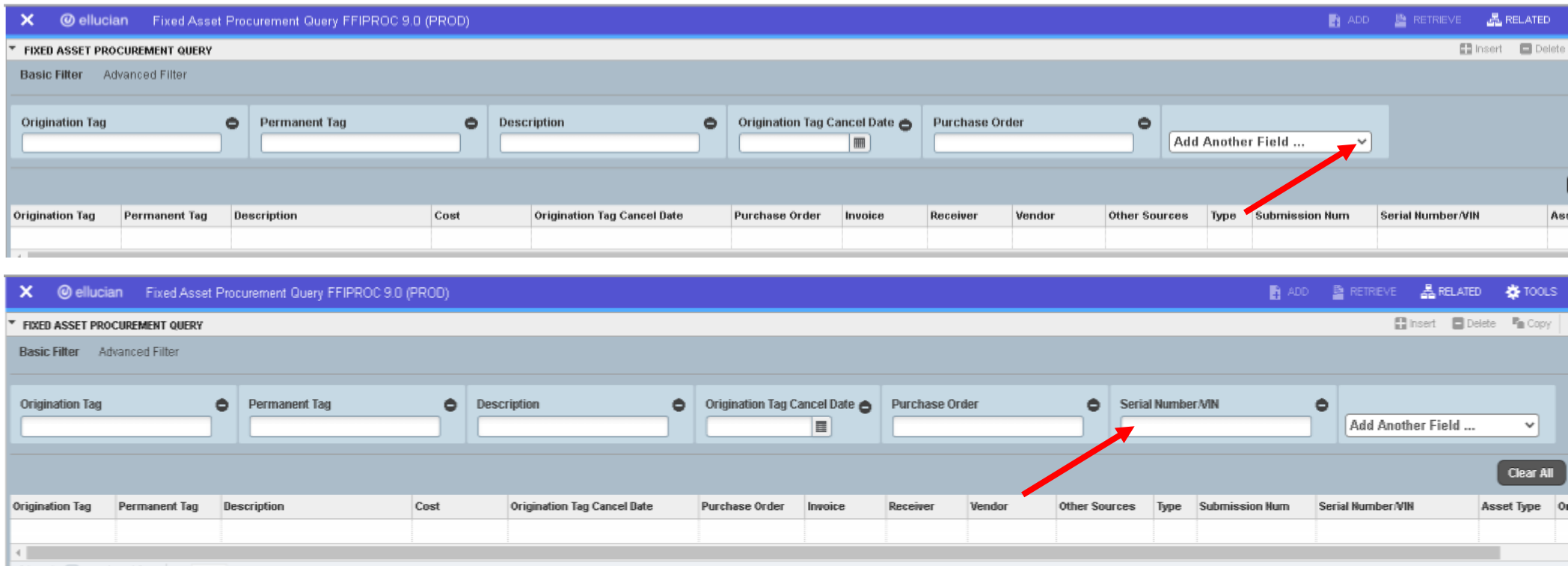
  

Transfer Data			
Date		Grant	
CAA	U University of Memphis	Custodian ID	
Organization	251000 Art	Equipment Manager	
Location	115820 Arts & Communication Bldg 20A		

The bottom left corner of the screen shows navigation arrows (up and down) which are circled in green. A red arrow points to the 'U' in the CAA field of the Transfer Data section.

# FFIPROC – Fixed Asset Procurement Query

Additional information may be found using the Banner INB FFIPROC page by purchase order #, serial #, description or other parameters.



The image displays two screenshots of the Banner INB FFIPROC 9.0 (PROD) interface, illustrating how to filter data by purchase order and serial number.

**Top Screenshot:** Shows the 'Basic Filter' section with the following fields: Origination Tag, Permanent Tag, Description, Origination Tag Cancel Date, and Purchase Order. A red arrow points to the 'Add Another Field ...' dropdown menu.

**Bottom Screenshot:** Shows the same interface, but with 'Serial Number/VIN' added to the filter fields. A red arrow points to the 'Serial Number/VIN' field.

Both screenshots show a table with the following columns: Origination Tag, Permanent Tag, Description, Cost, Origination Tag Cancel Date, Purchase Order, Invoice, Receiver, Vendor, Other Sources, Type, Submission Num, Serial Number/VIN, and Asset Type.





# Equipment Representatives Listing

The list of current equipment representatives can be viewed at <https://umwa.memphis.edu/programguides/eqreps.php>

***Ensure that each Organization has an equipment representative.***

THE UNIVERSITY OF  
MEMPHIS

**Finance**  
Program Guide

Print Version

#### FOAPALS

- search by index
- search by fund
- search by organization
- search by program
- search by activity
- search by multiple fields
- search by orgn title
- search by index title

#### SIGNATURES

- signatures by org
- signatures by name
- approval queues by org
- approval queues by name

#### EQUIPMENT REPS

- assign equipment reps
- view equipment reps
- fixed asset workflow help

## Equipment Reps List by Organization

Expand All

Collapse All

Export to Excel

- + 10000
- + 20000
- + 30000
- + 40000
- + 50000
- + 60000
- + 70000
- + 80000

**Narrow results displayed by entering any part of the organization code number, title, or equipment rep name below.**

Search



# Location Code Search

The list of location codes can be viewed at

<https://umwa.memphis.edu/programguides/search-locations.php>

**THE UNIVERSITY OF MEMPHIS**

**Finance**  
Program Guide

**Location Code Search**

Enter all or part of the building name and click Search to generate a list of corresponding Location Code matches.

**Search Location:**

**FOAPALS**  
search by index  
search by fund  
search by organization  
search by program  
search by activity  
search by multiple fields  
search by orgn title  
search by index title

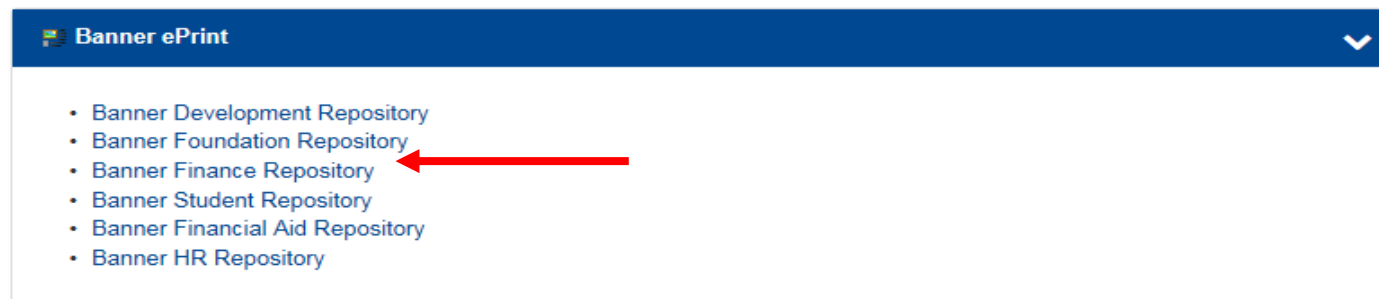
**SIGNATURES**  
signatures by org  
signatures by name  
approval queues by org  
approval queues by name  
EPAF approval queues by name

**EQUIPMENT REPS**  
assign equipment reps  
view equipment reps  
fixed asset flow help

**CODES**  
account code list  
rule code list  
location code search  
program code list  
data standards manual

# Resources

- Questions / Issues  
[wf-fixed-assets@memphis.edu](mailto:wf-fixed-assets@memphis.edu)
- Financial Reporting Website – Fixed Assets  
<http://www.memphis.edu/accounting/fixedassets.php>
- ePrint Report – FYFR001 (Fixed Asset Inventory Listing)



- Additional workshop will be available:  
March 25, 2024, 2:00 – 3:00 p.m. via Zoom  
<https://memphis.zoom.us/j/87061890294?pwd=UHpUMVZwNlIRc1U5TWdlMENhTTdTUT09>



**QUESTIONS?**

# More on Fixed Assets



**Vicki D. Deaton, Chief Audit Executive**



# More on Fixed Assets

- One of Internal Audit's focus areas is Fixed Assets.
- We want to make sure that the assets can be physically located and that the asset record is complete and accurate.



# More on Fixed Assets

Past audit issues include:

1. No assigned equipment representative
2. Assets with no documented location
3. Assets with no serial number
4. Assets with missing tag or decal
5. Assets with incorrect location
6. No paperwork for off-campus equipment
7. **LOST or STOLEN equipment**
8. **No reporting of lost or stolen equipment**



# More on Fixed Assets

Organizations are currently performing their own Fixed Asset Audits for the capital asset annual inventory confirmation completion.

## Responsibilities for All Property

- By policy, organizations are responsible for the custody, maintenance, and reasonable security of **all** equipment (including all computers and laptops) purchased for, or assigned to, their respective department or activity, and
- **Organizations should develop an internal inventory maintenance process to safeguard all property, regardless of the cost.**





# More on Fixed Assets

If it is determined that items are lost or stolen:

- University policy GE2029 Lost or Stolen University Property includes the process and procedures for reporting and resolving lost or stolen University property or resources.
- This policy applies to all University property, regardless of the cost and whether or not the property is recorded in Banner.



# More on Fixed Assets

A Report of Lost or Stolen Property form should be completed as soon as the unit is aware that an item is lost or stolen.

There is a link to the form from GE2029. The form is included under the Financial Reporting section of Business & Finance Forms on the University website: [memphis.edu/bf/forms](https://www.memphis.edu/bf/forms).



**INSTRUCTIONS:**

- i. Complete Sections A, B, and C and submit to University Police Services via email to [police@memphis.edu](mailto:police@memphis.edu)
- ii. Forward a copy to the Accounting Office via email to [wf-fixed-assets@memphis.edu](mailto:wf-fixed-assets@memphis.edu)
- iii. Complete a separate form for each missing asset.

**A. ASSET INFORMATION**

Name/Description of Asset: \_\_\_\_\_

University Decal No.	Make	Model	Serial Number
Department	Org Code	Approximate Value	Original Cost (if known)
Date Discovered Missing	Last Known Location of Asset		

**B. CIRCUMSTANCES OF LOSS**

Select one:  Lost/Missing  Stolen

Is asset a computing device? (laptop, desktop, ipad, etc.)  Yes  No

*If yes, forward this form to ITS also to [umtech@memphis.edu](mailto:umtech@memphis.edu) with "Lost Computer" in the subject line of the email.*

Was an external police report filed?  Yes (complete fields below)  No

Name of Police Department \_\_\_\_\_

Case No. \_\_\_\_\_

Additional information regarding loss of asset:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**C. SIGNATURES:**

Prepared by:	_____ Signature	_____ Date
Department/Activity Head:	_____ Signature	_____ Date
Dean/Division Head:	_____ Signature	_____ Date

**D. University Police Services Use Only**

Received by: _____	Date: _____
Action taken: <input type="checkbox"/> None <input type="checkbox"/> Investigation Pending	

Upon completion by Police Services, please forward a copy to the Accounting Office ([wf-fixed-asset@memphis.edu](mailto:wf-fixed-asset@memphis.edu))



# More on Fixed Assets

The form is submitted to:

1. University Police Services
2. Accounting Office

Police Services and the Accounting Office perform certain procedures based on the report.

They are also required to report property losses to Internal Audit. Internal Audit will then notify the appropriate state offices and perform an investigation if needed.



# More on Fixed Assets

The form is submitted to:

3. ITS if the lost or stolen item is a computing device

ITS works with the organization to perform an investigation to try to locate the device.

The organization should try to determine if any restricted or individually identifiable data is included on the device because there could be a potential data breach or FERPA violation.



# More on Fixed Assets

Organizations should develop an internal inventory maintenance process to safeguard all property, regardless of the cost.

- There are currently more than 14,000 Banner asset records from the computer, sensitive minor equipment, and sensitive under \$1500 categories.
- More than 8,000 of these are at least 5 years old
- More than 3,000 of these are at least 10 years old



**QUESTIONS?**



# Once and For All..How to Calculate Overtime



**Danny Linton, Associate Director, Human Resources**





# The Basics

- The below does not apply to Police Services, which uses different rules.
- Non-exempt employees who work beyond 37.5 hours in a workweek are entitled to overtime.
- Hours 37.6 thru 40.0 are paid at the same payrate as regular hours. Hours 40.1 and beyond are paid at a rate of time and a half.



# The Rules

- Overtime is calculated on a WEEKLY basis running Saturday thru Friday. Just because an employee works over his/her normal schedule on a given DAY does not mean he/she will be in an overtime scenario for the WEEK.
- The only things that count toward possible overtime are **regular work** and **holiday pay**.
- Everything else (annual leave, sick leave, jury duty, bereavement, emergency closing, etc.) cannot cause an overtime scenario.

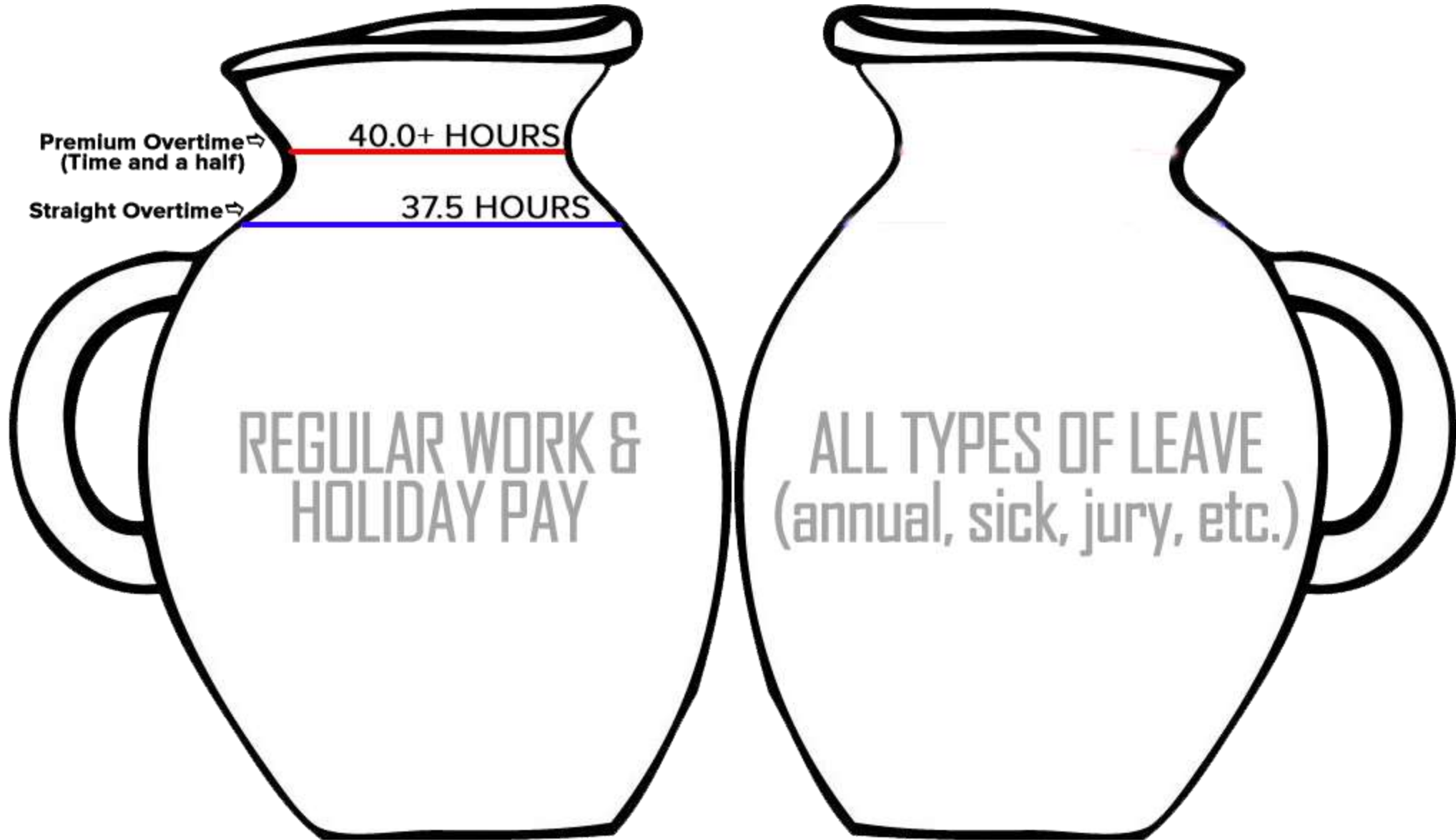
# Examples

- Think of having two pitchers to fill with water.
- The first one, marked for Regular Work and Holidays, has markings at the top indicating when the overtime threshold has been reached.
- The second one, marked for Leave Usage, has no markings for overtime since leave cannot cause an overtime scenario.
- Consider the forthcoming examples.



# Example 1

- Fred, a non-exempt employee, worked 8am-4:30pm Monday-Friday this week and took no leave.



Premium Overtime →  
(Time and a half)

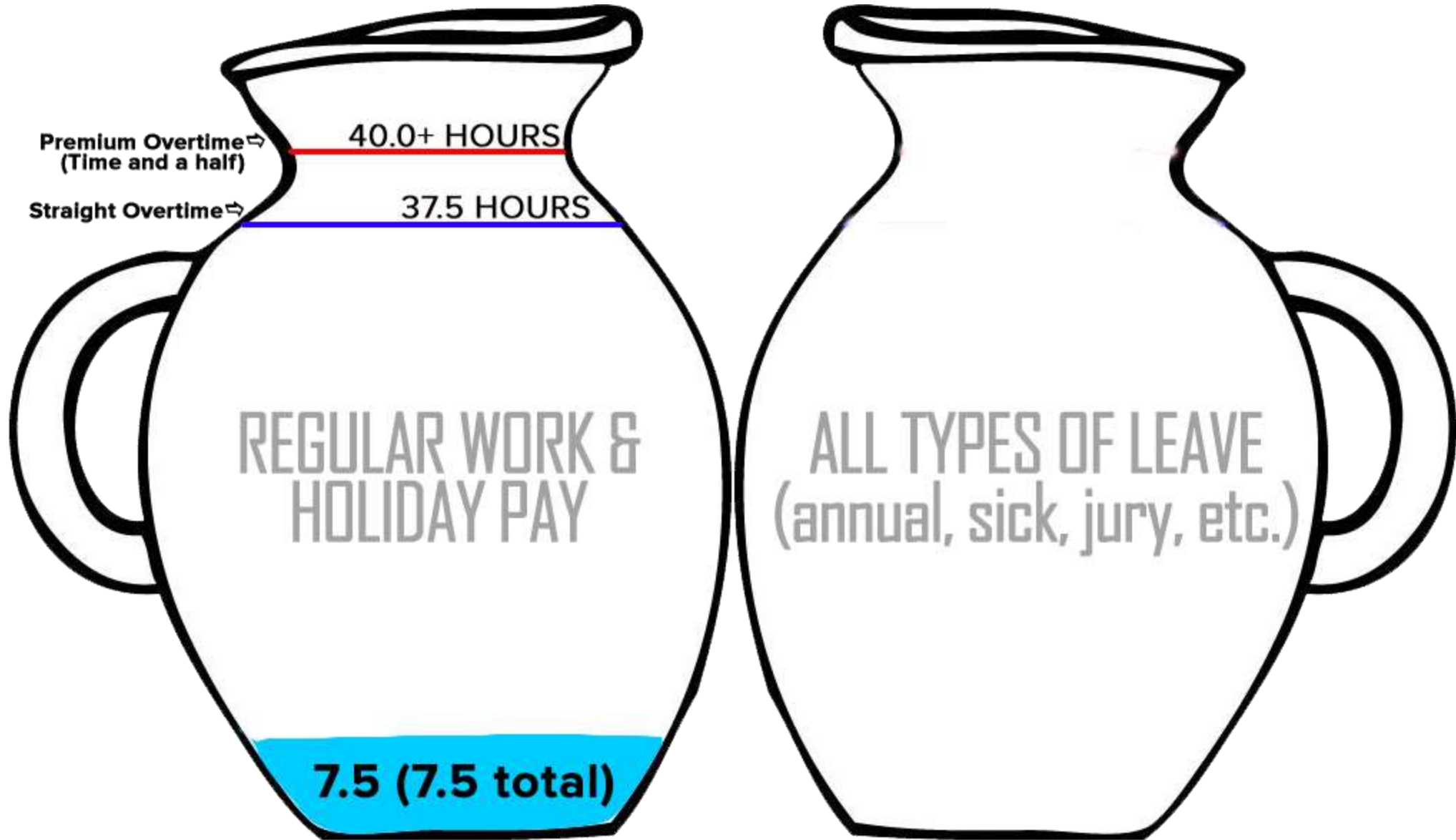
40.0+ HOURS

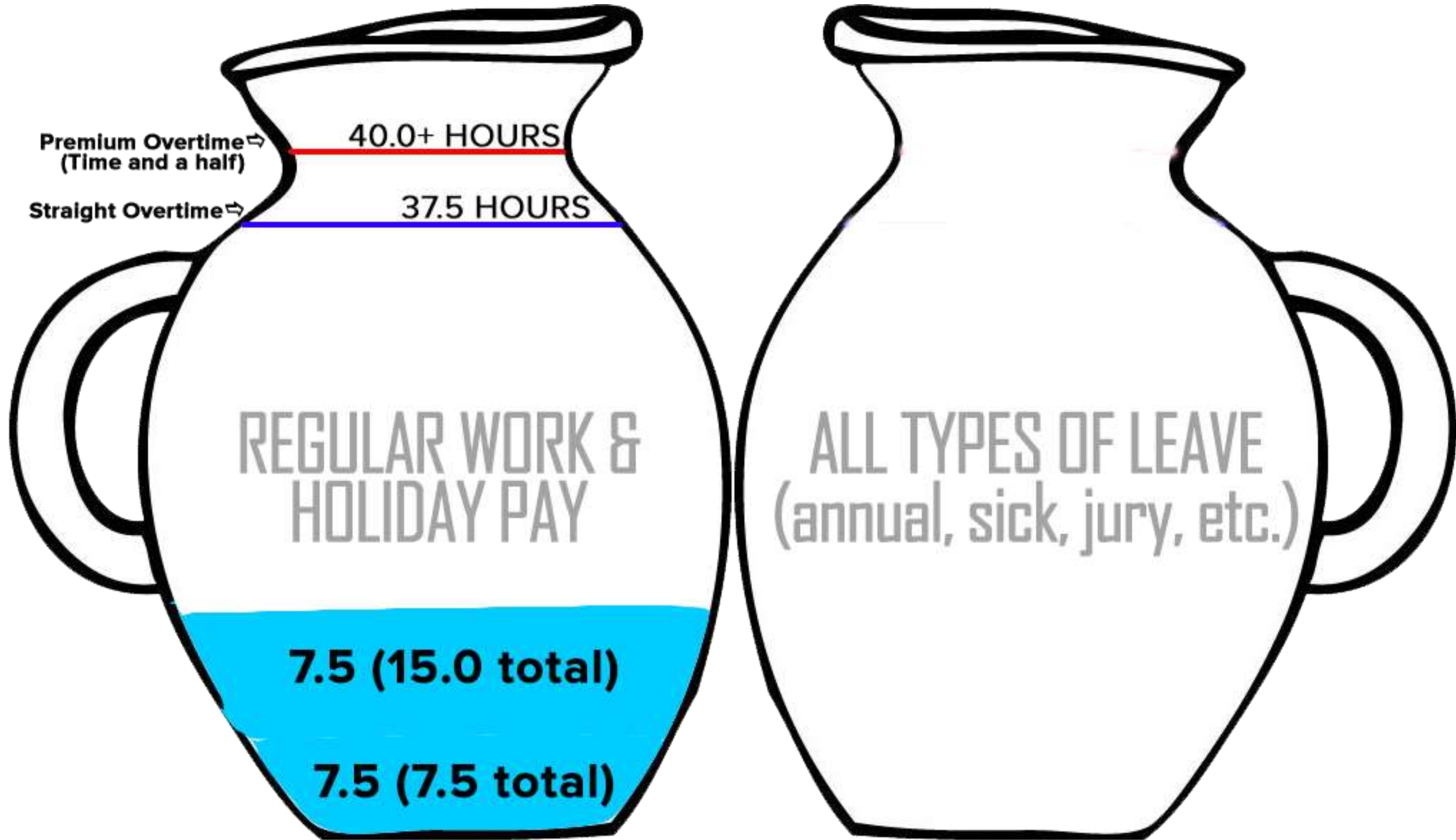
Straight Overtime →

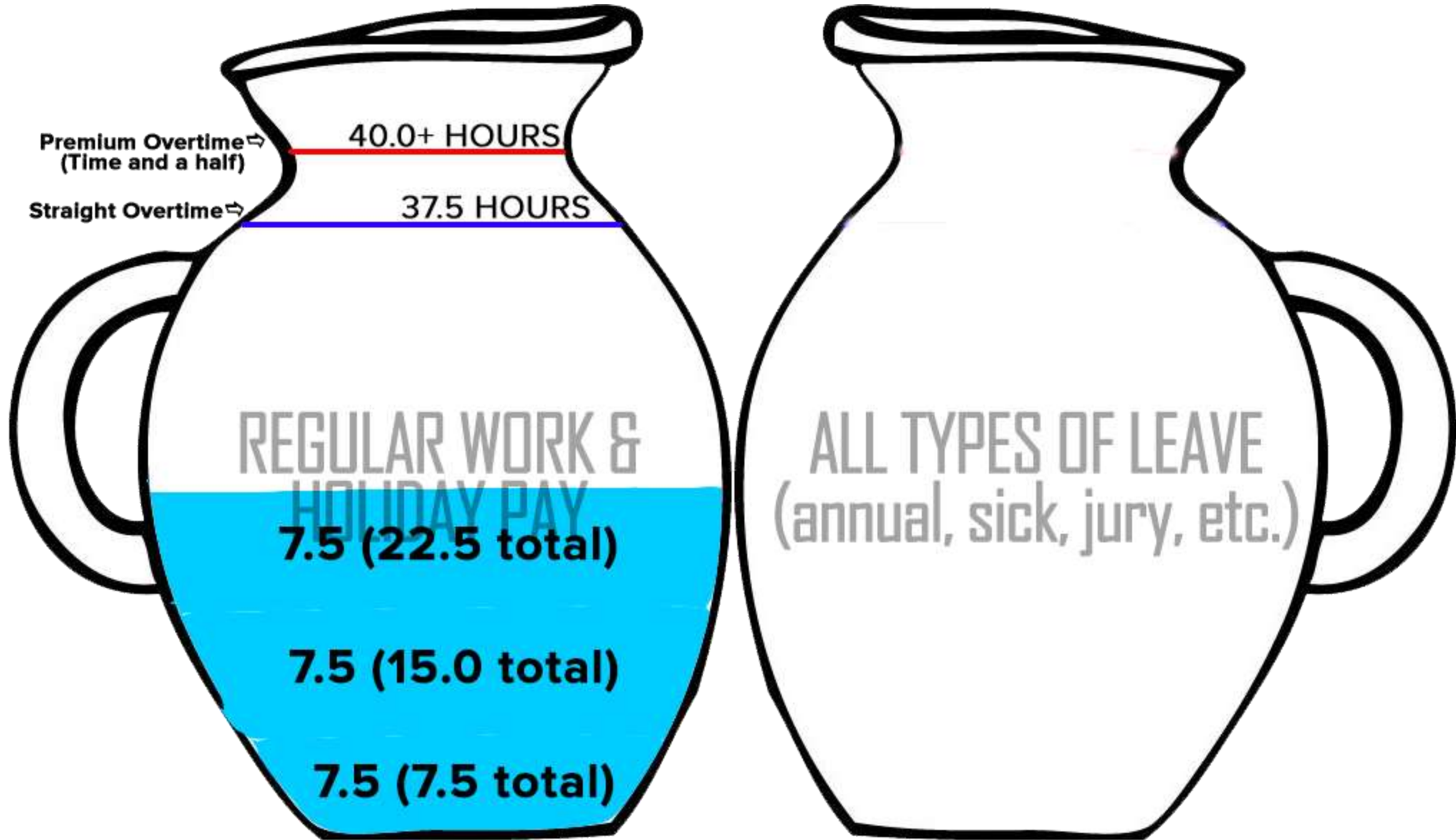
37.5 HOURS

REGULAR WORK &  
HOLIDAY PAY

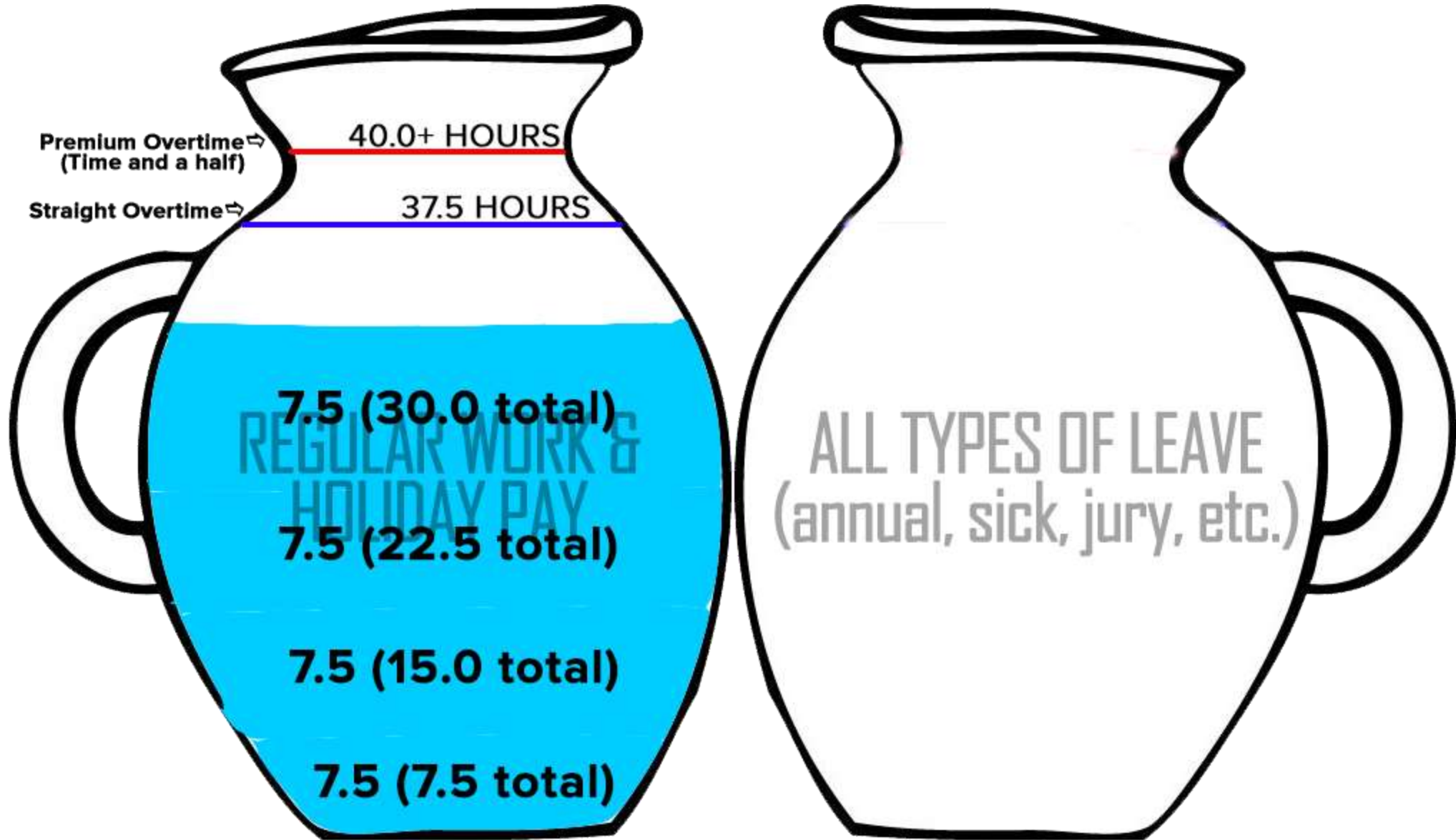
ALL TYPES OF LEAVE  
(annual, sick, jury, etc.)

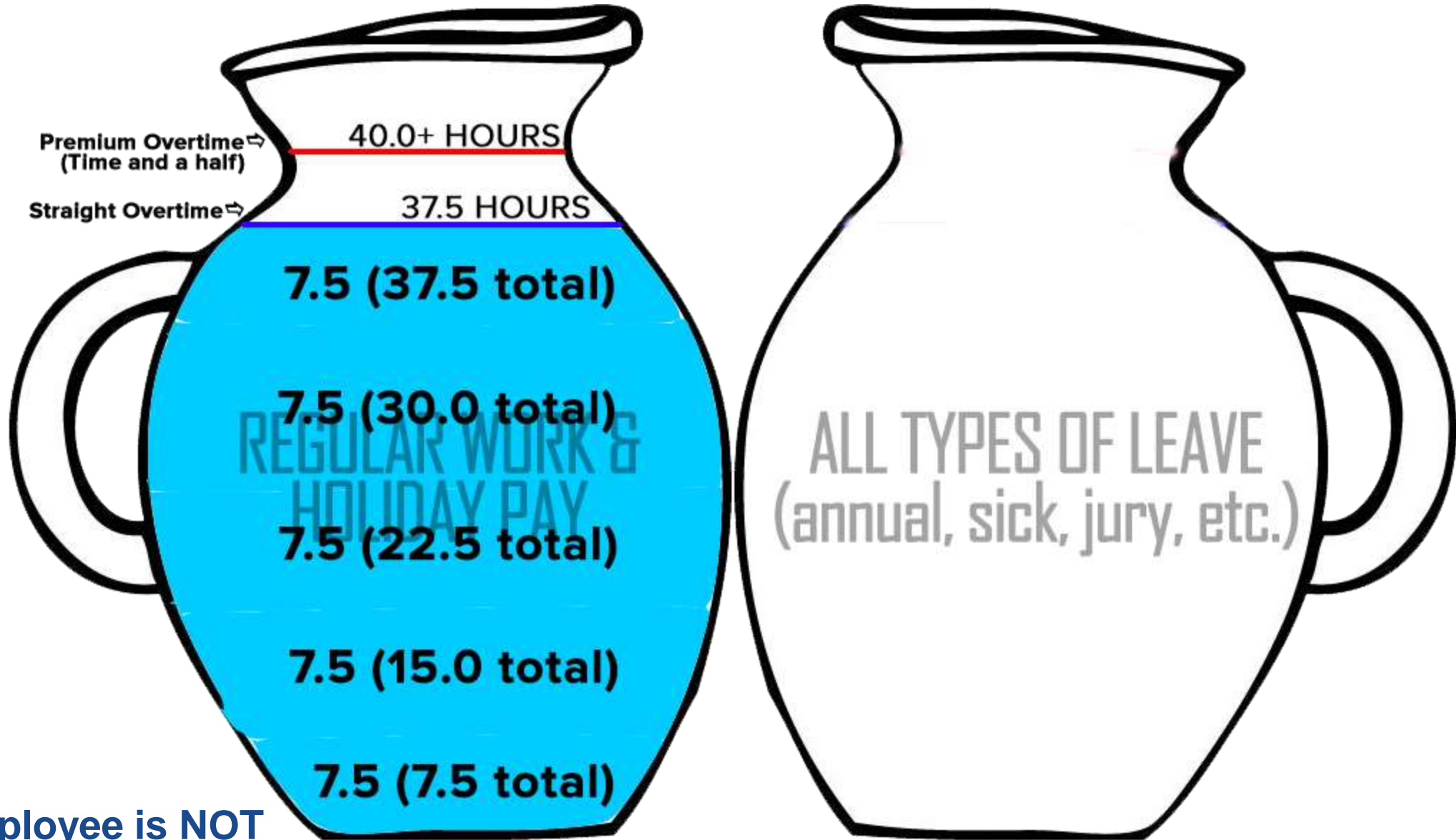










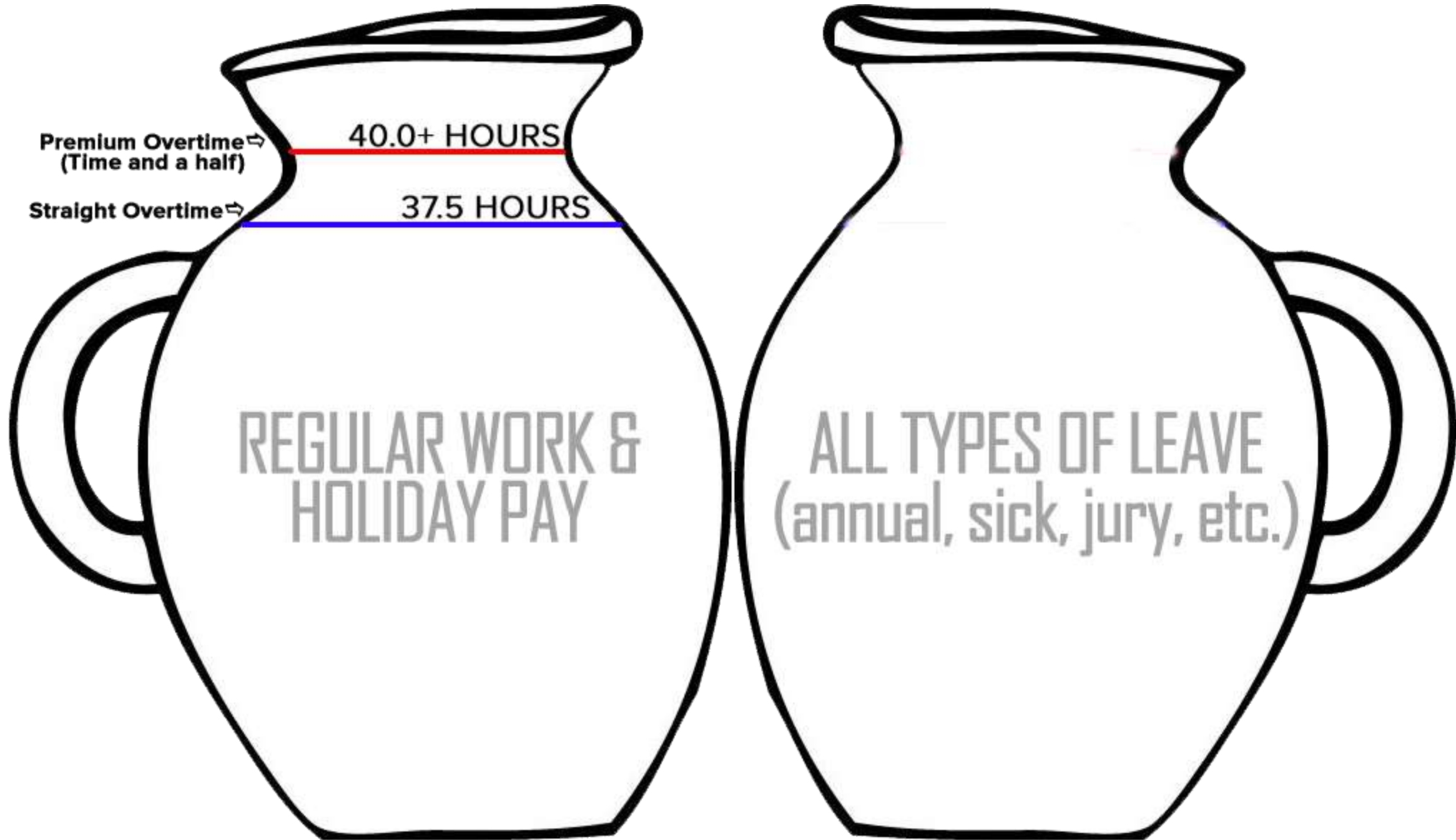


This employee is NOT due any overtime.



## Example 2

- Wilma, a non-exempt employee, worked 8am-4:30pm Monday-Friday this week and took no leave, but worked an extra 3 hours on Wednesday to help with an evening event.



Premium Overtime (Time and a half)

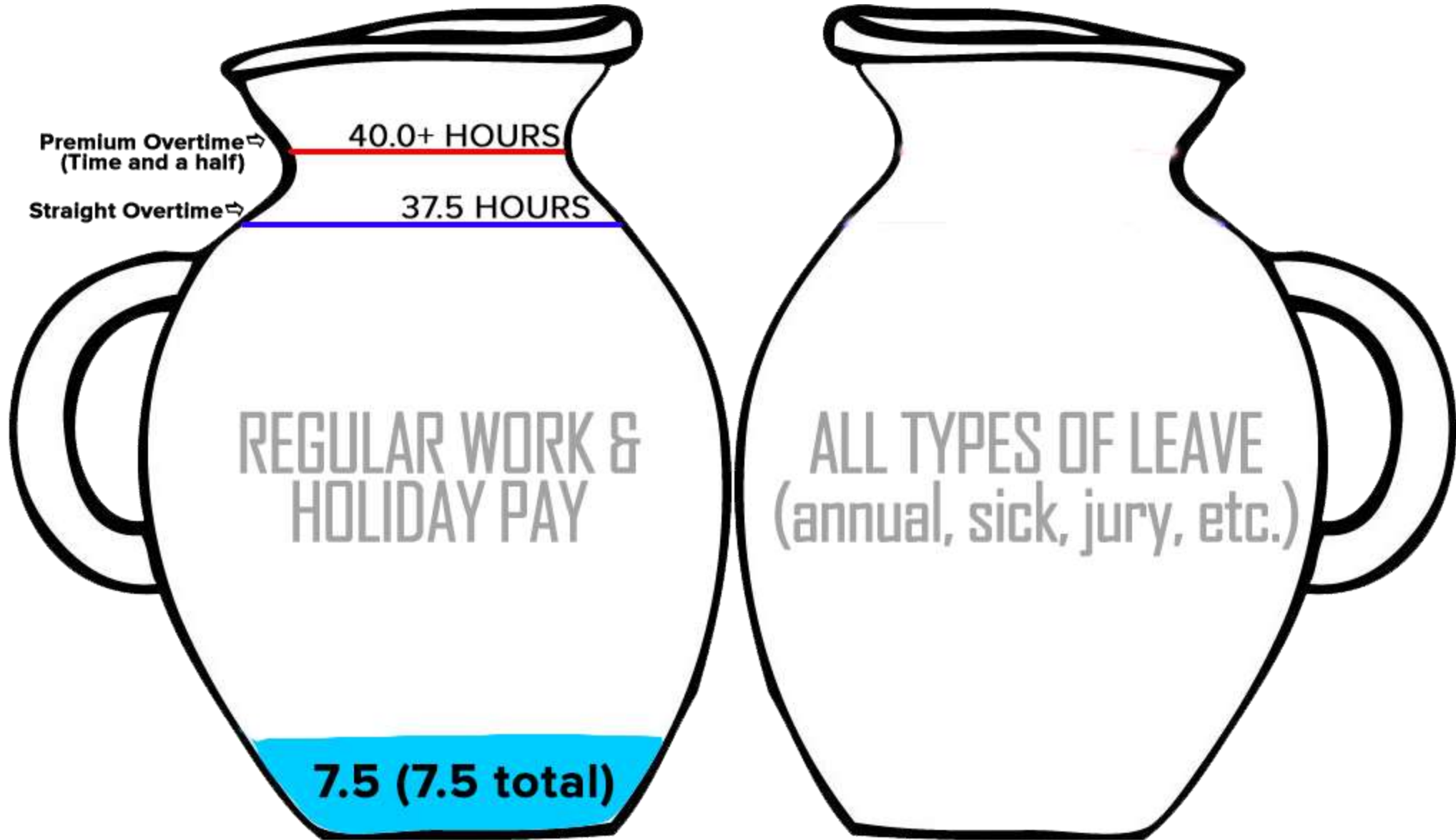
40.0+ HOURS

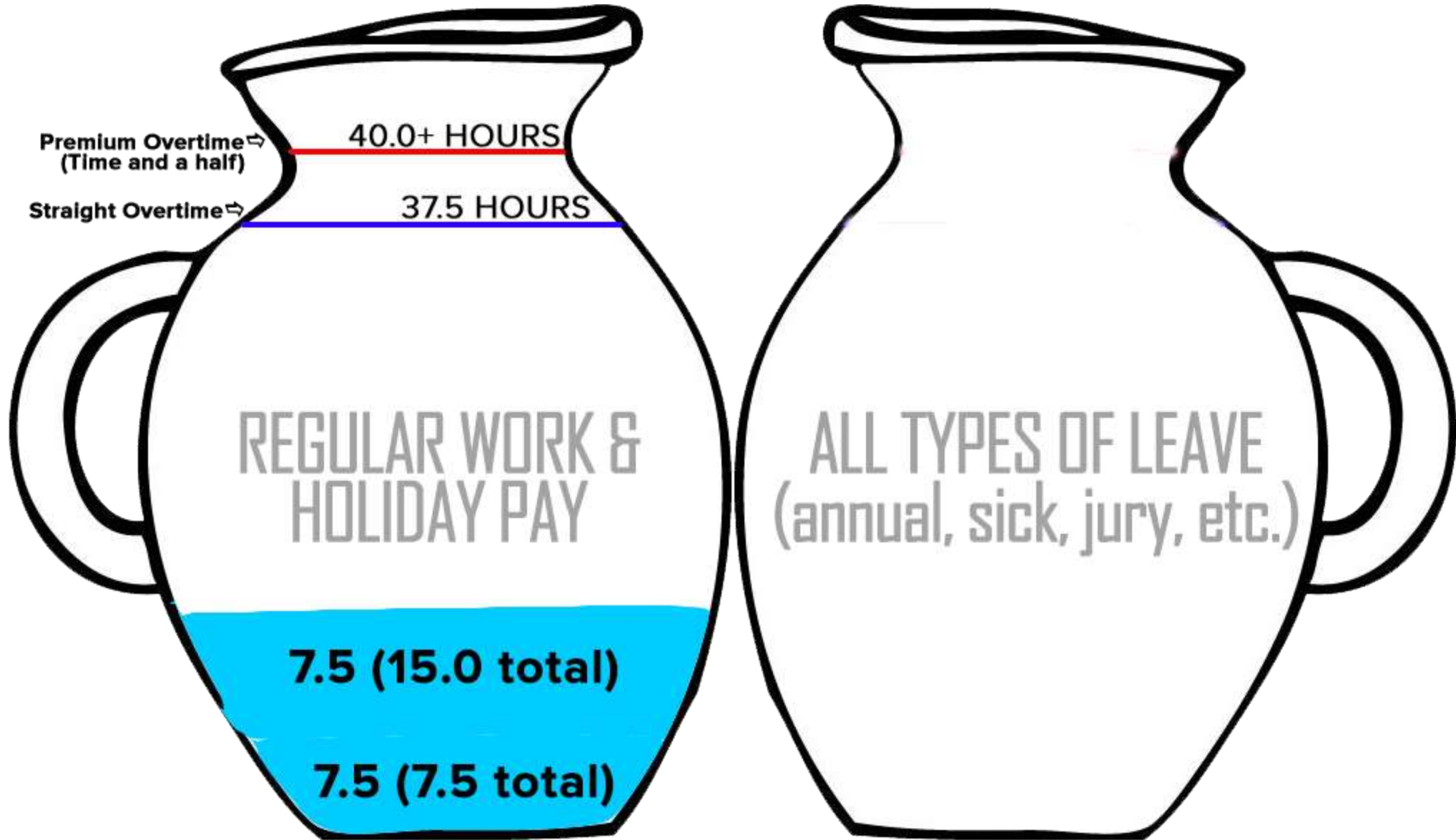
Straight Overtime

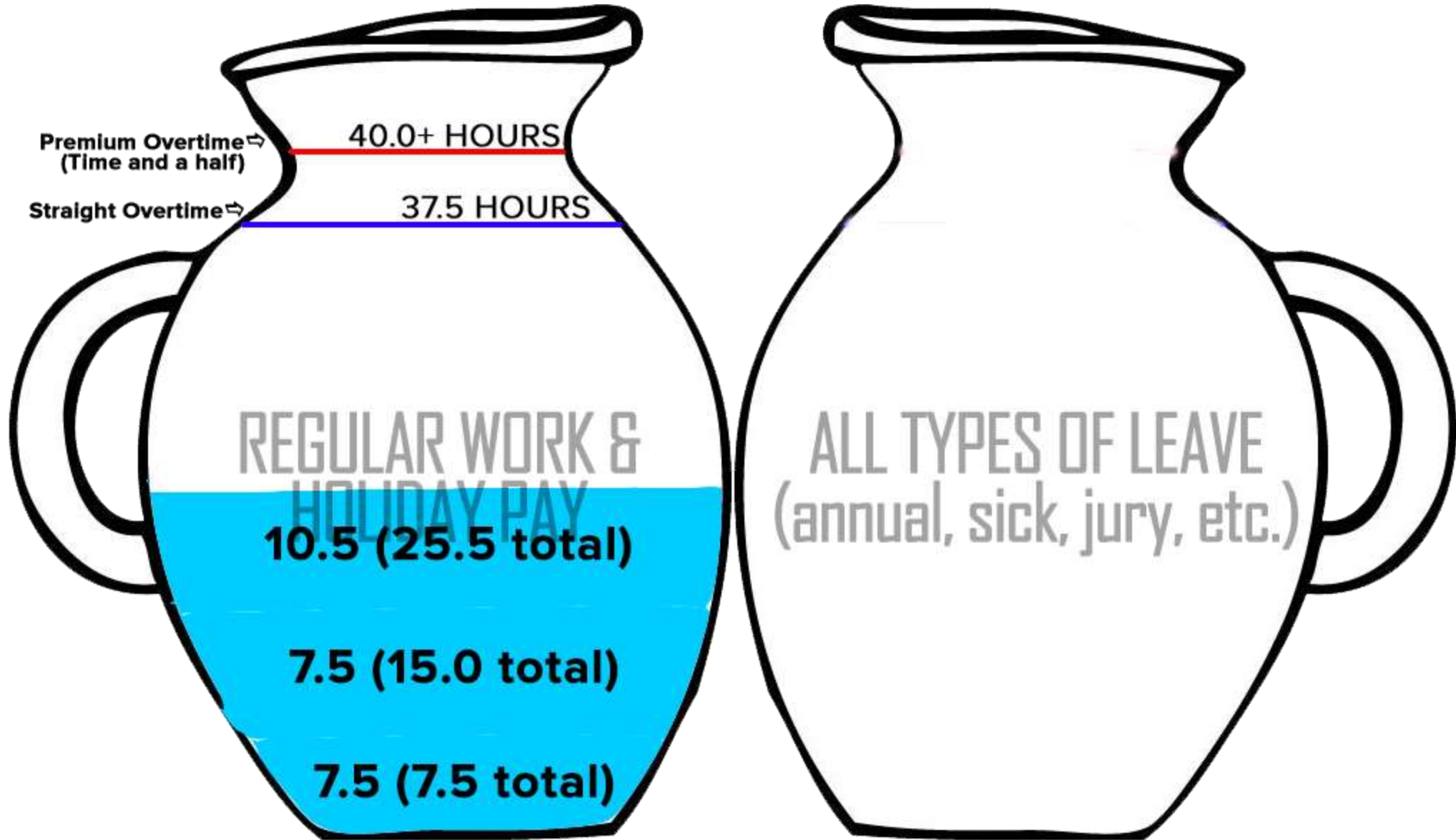
37.5 HOURS

REGULAR WORK & HOLIDAY PAY

ALL TYPES OF LEAVE (annual, sick, jury, etc.)







Premium Overtime →  
(Time and a half)

40.0+ HOURS

Straight Overtime →

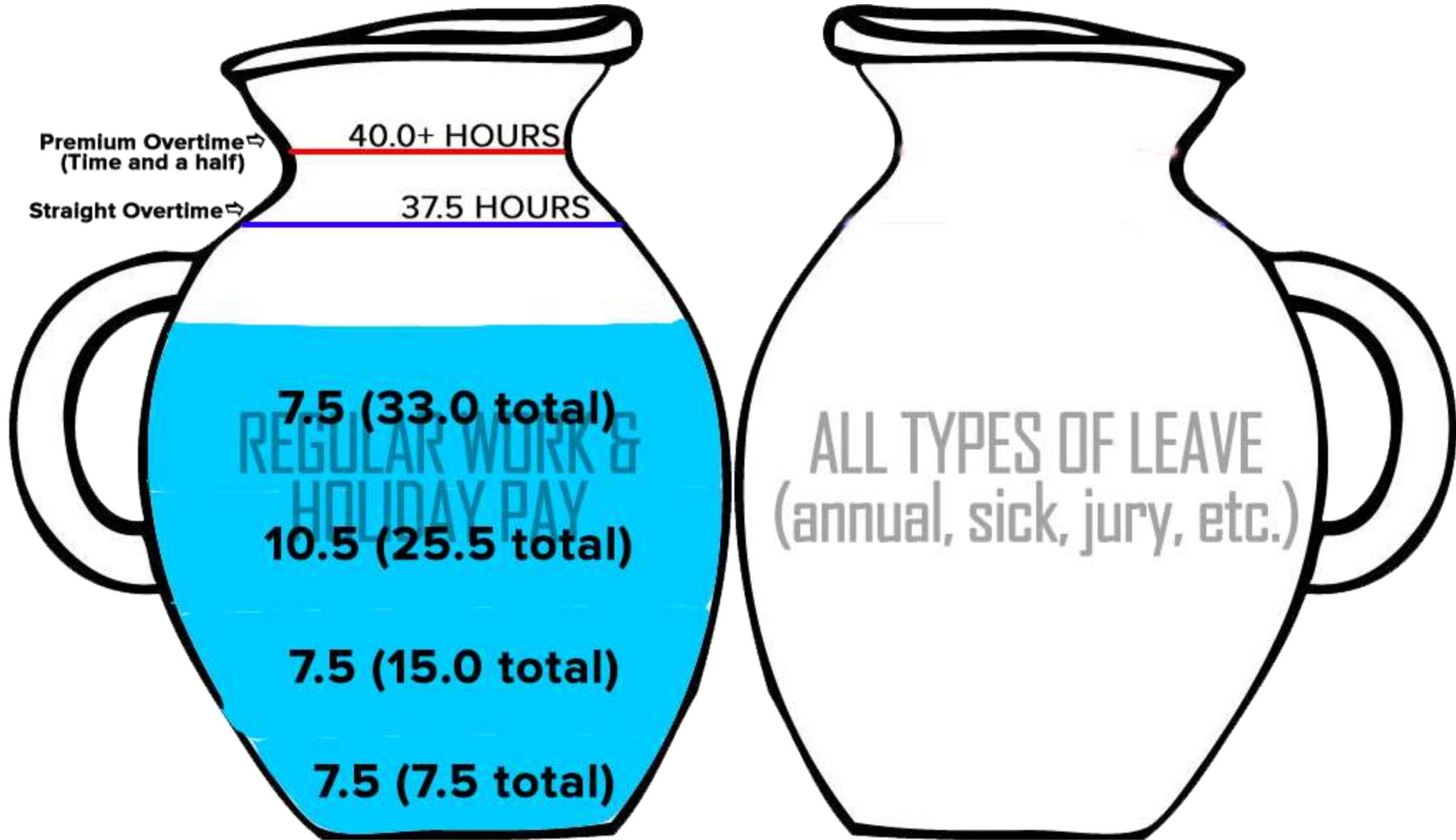
37.5 HOURS

REGULAR WORK &  
HOLIDAY PAY  
10.5 (25.5 total)

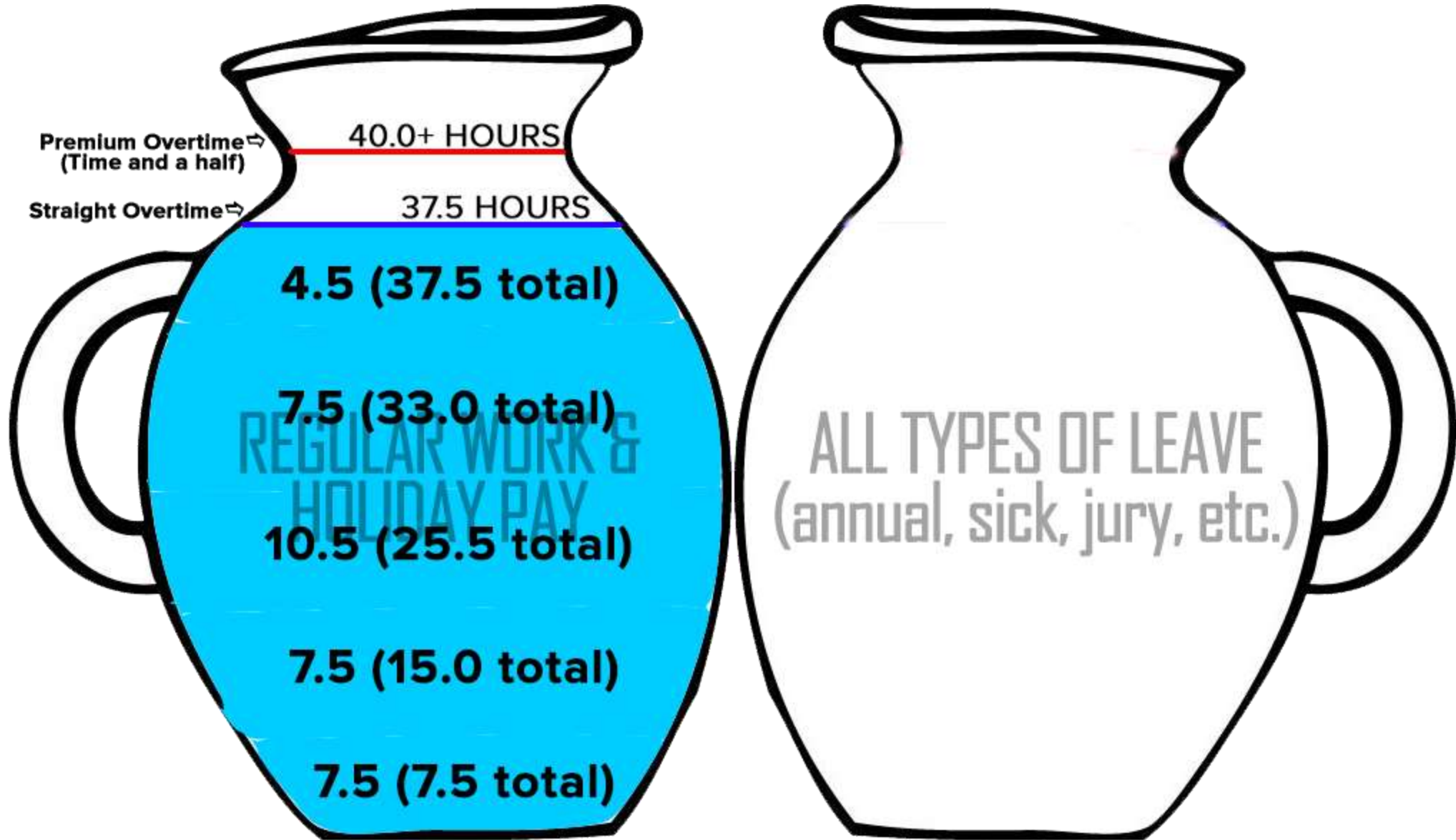
7.5 (15.0 total)

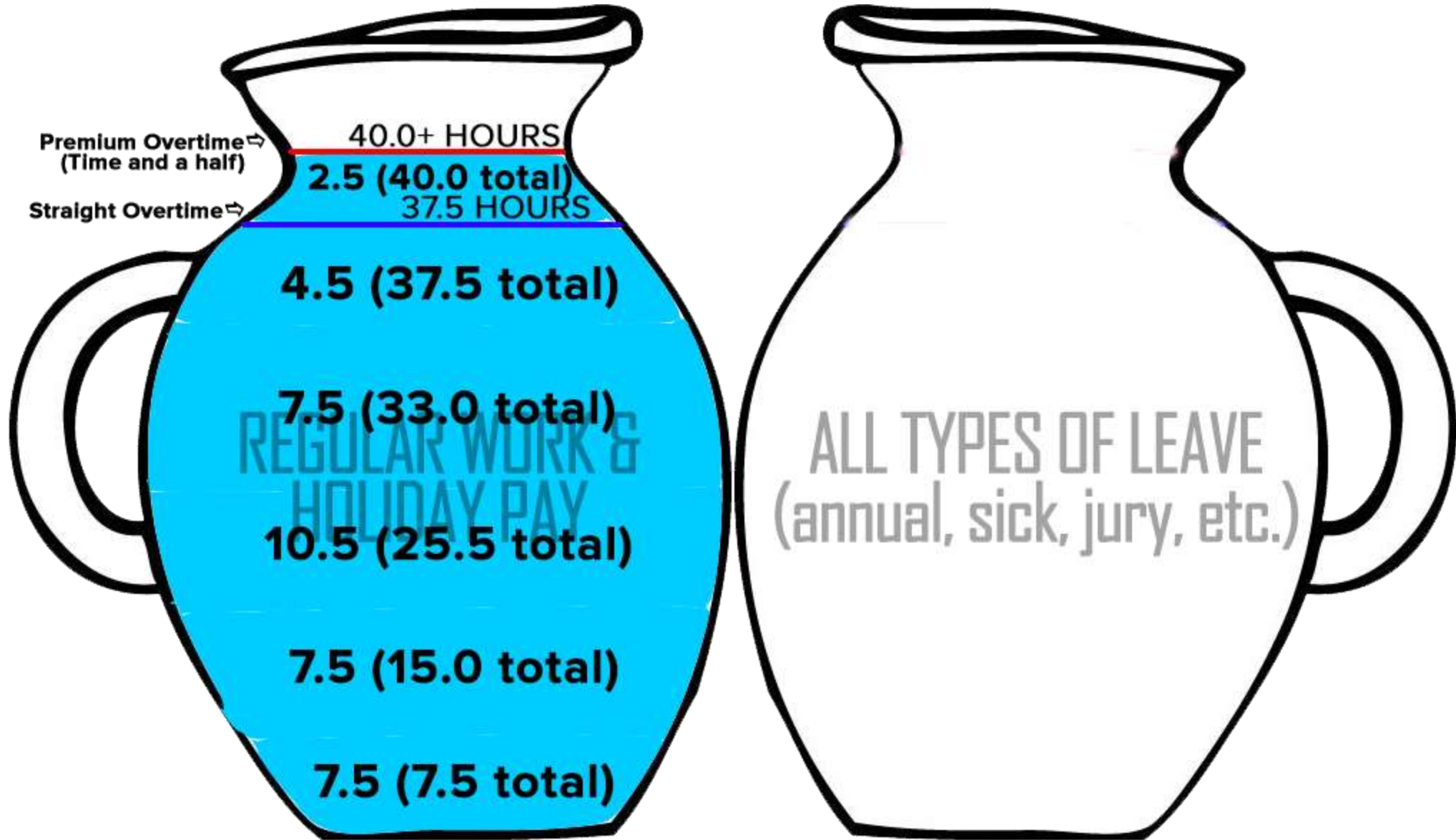
7.5 (7.5 total)

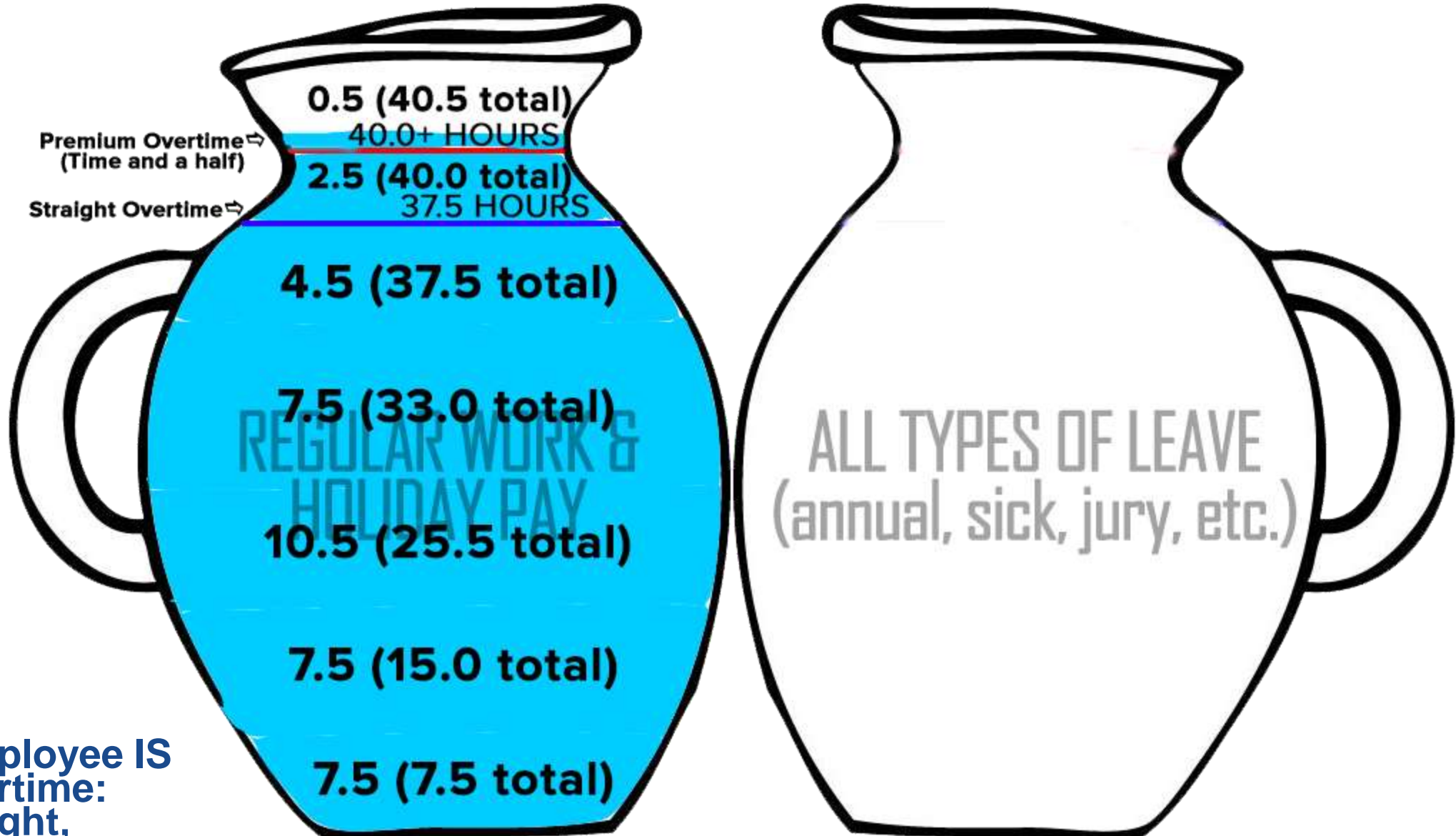
ALL TYPES OF LEAVE  
(annual, sick, jury, etc.)









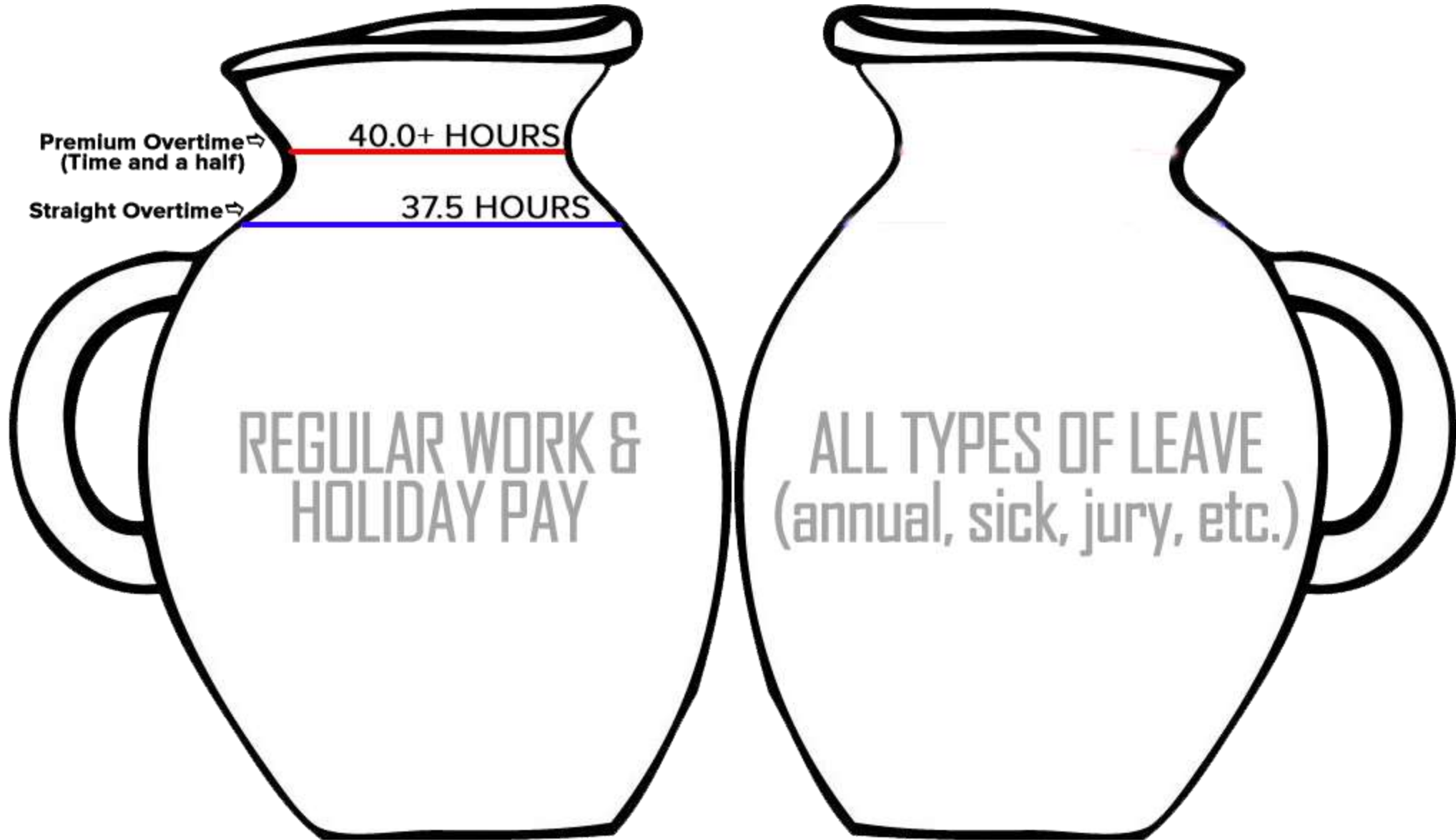


This employee IS  
due overtime:  
2.5 straight,  
0.5 premium.



## Example 3

- Barney, a non-exempt employee, worked 8am-4:30pm Monday & Tuesday, took a sick day Wednesday, worked 8am-8pm Thursday, and took an annual leave day on Friday.



Premium Overtime →  
(Time and a half)

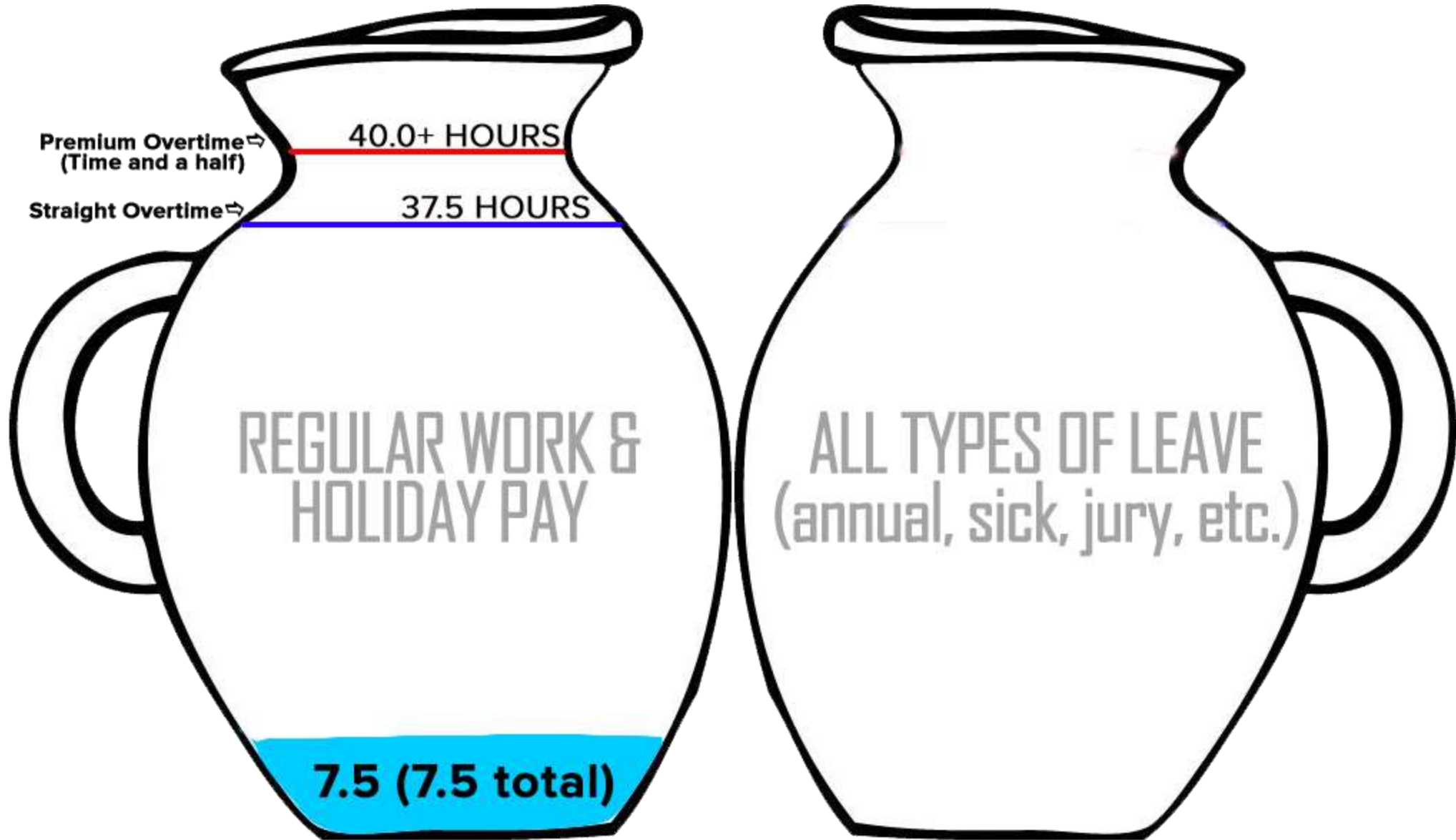
40.0+ HOURS

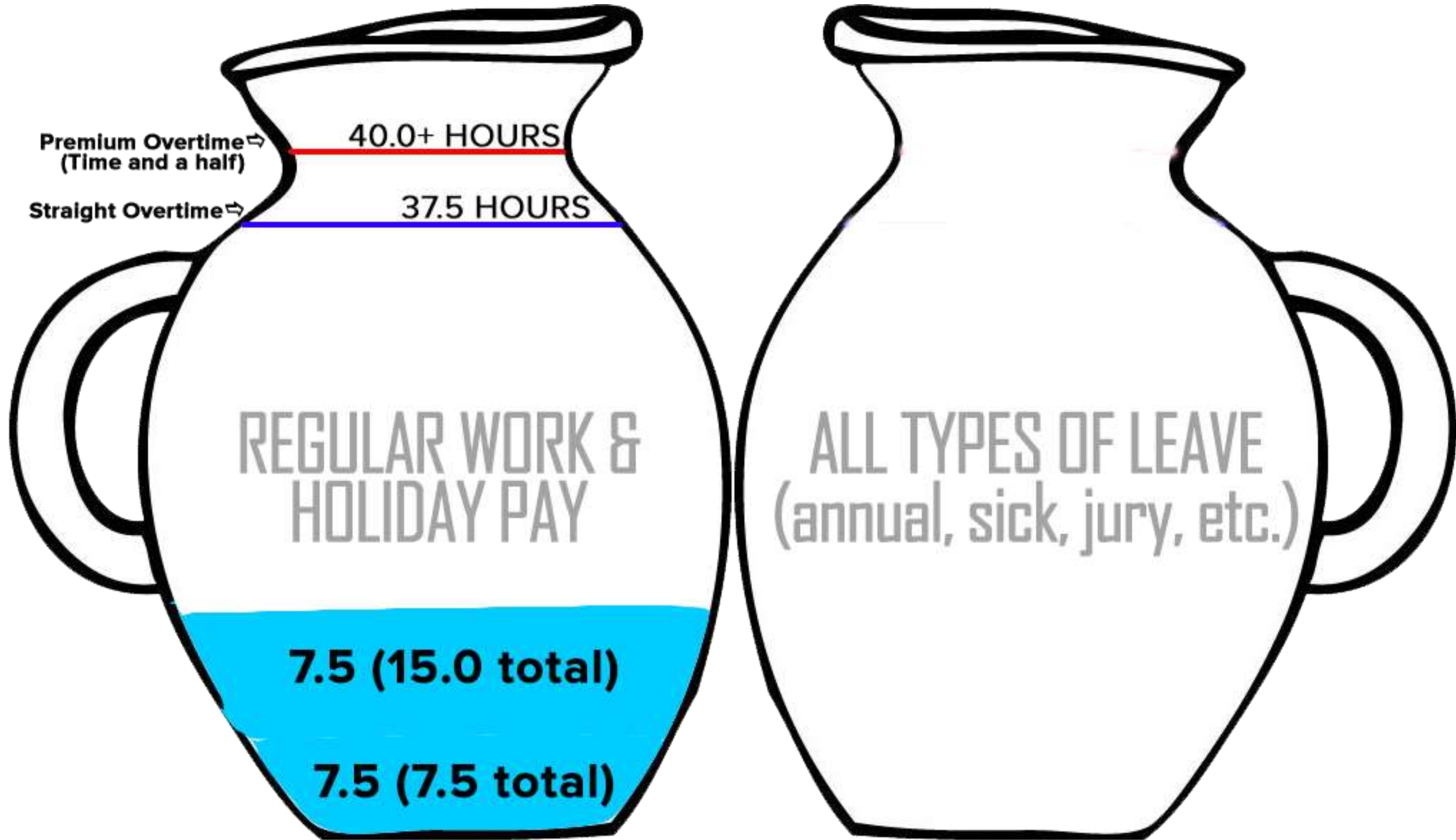
Straight Overtime →

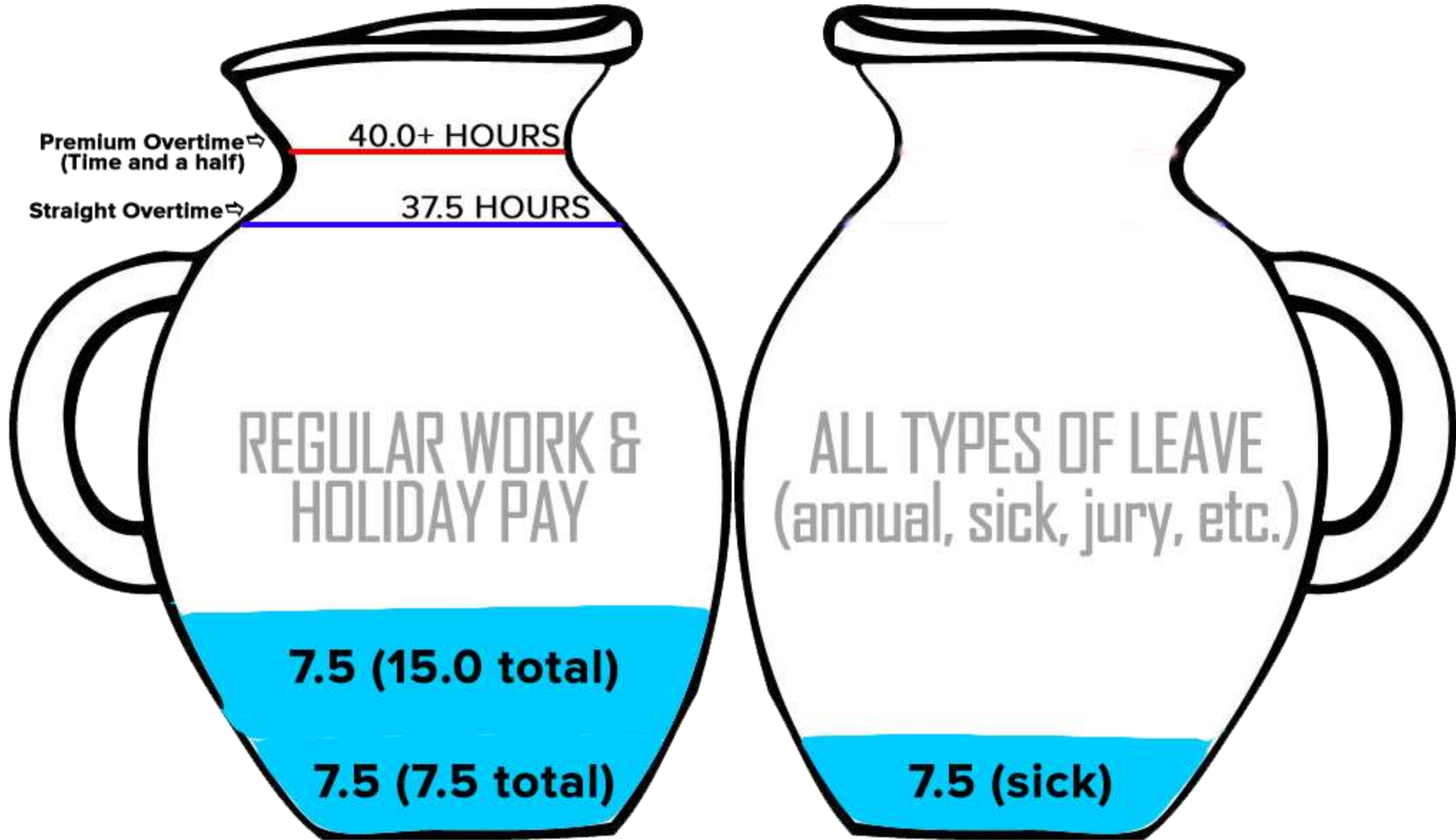
37.5 HOURS

REGULAR WORK &  
HOLIDAY PAY

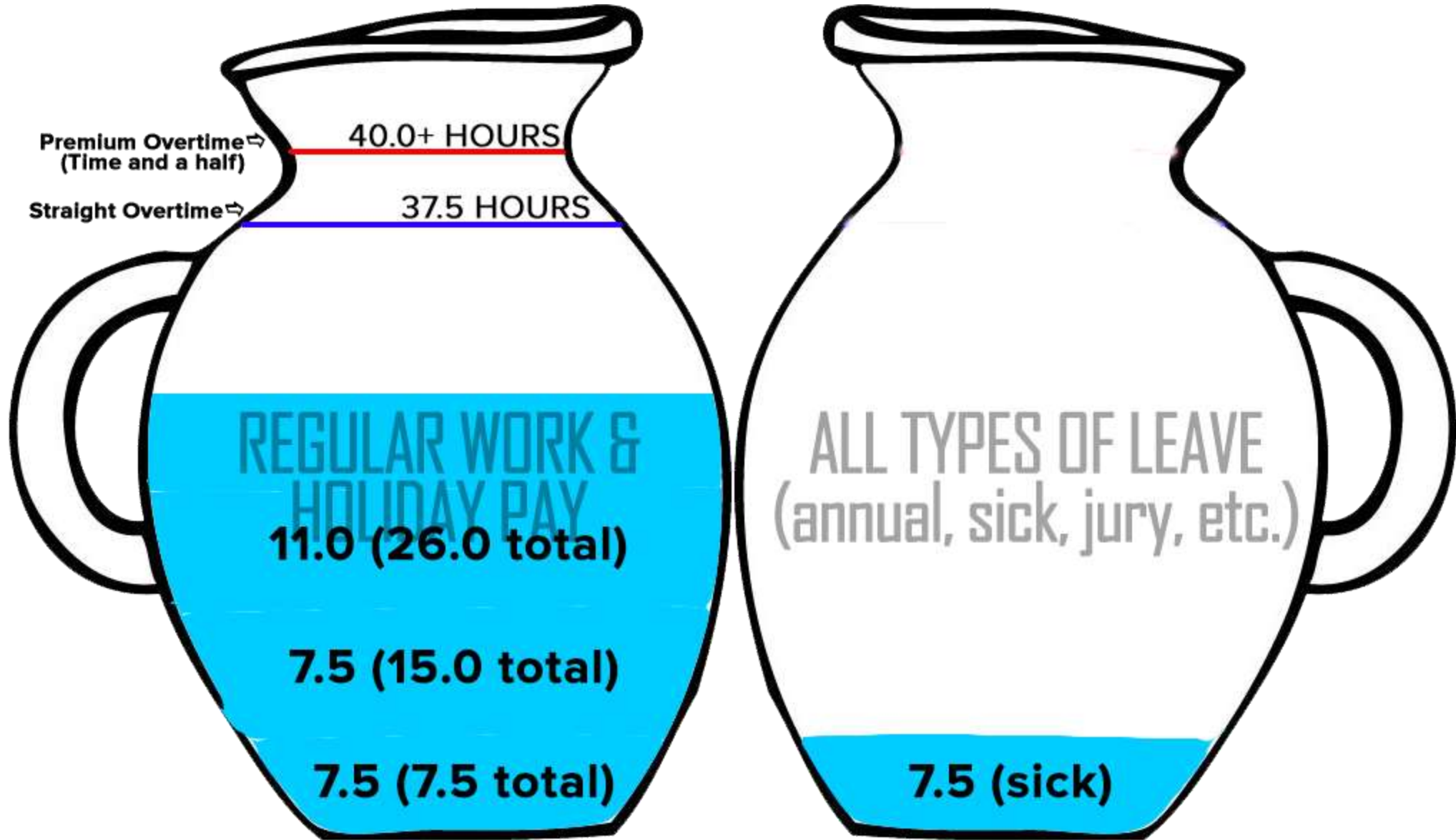
ALL TYPES OF LEAVE  
(annual, sick, jury, etc.)

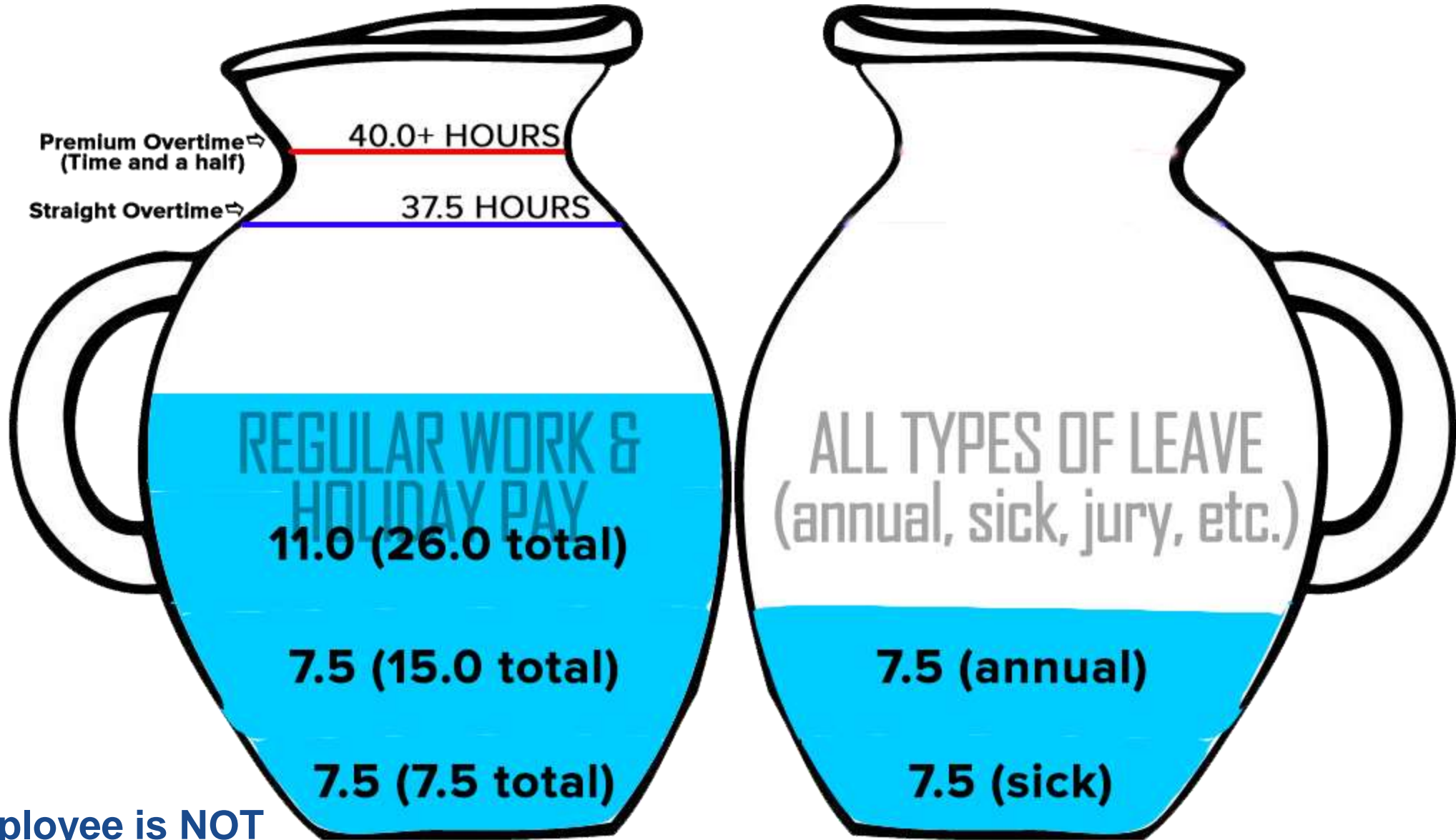










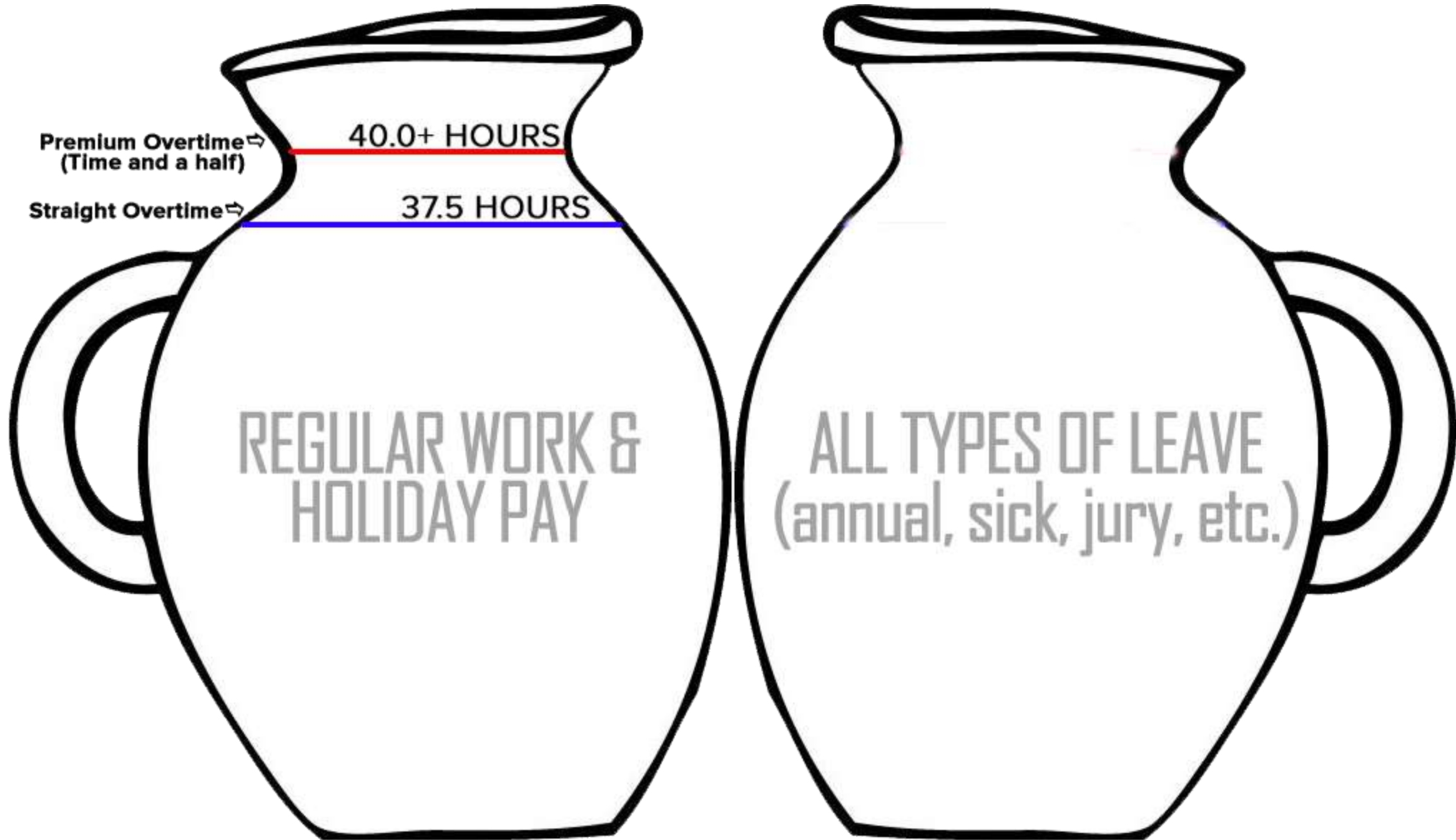


This employee is NOT due any overtime.



## Example 4

- Betty, a non-exempt employee, normally works a Monday-Friday schedule from 8am-4:30pm. However, this week she came in on Saturday and Sunday and worked 8am-4:30pm on a special project. She then worked her normal hours Monday-Wednesday. Then an ice storm blew through town, closing the University on Thursday and Friday. Betty was not identified as an emergency crucial employee.



Premium Overtime (Time and a half)

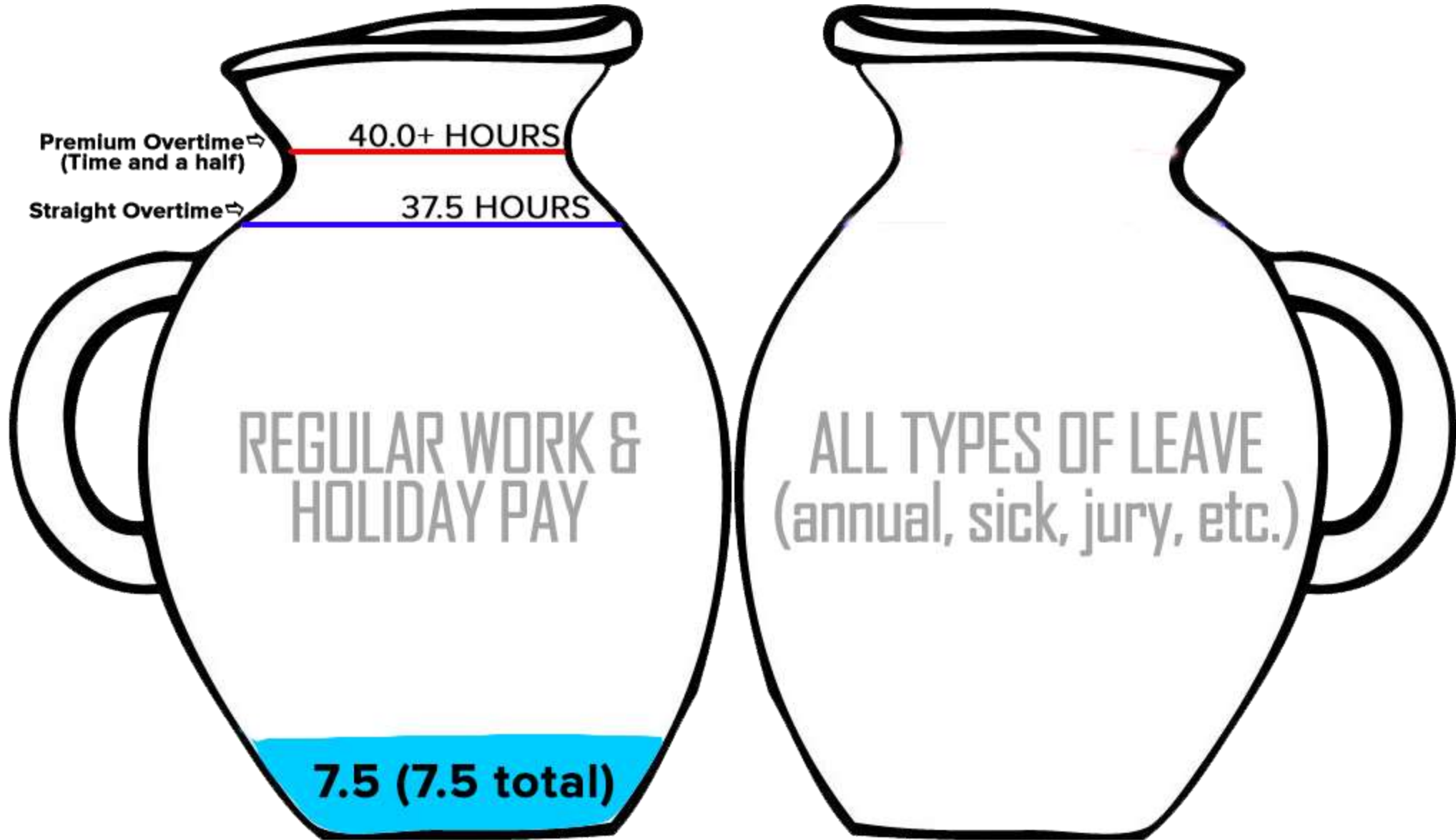
40.0+ HOURS

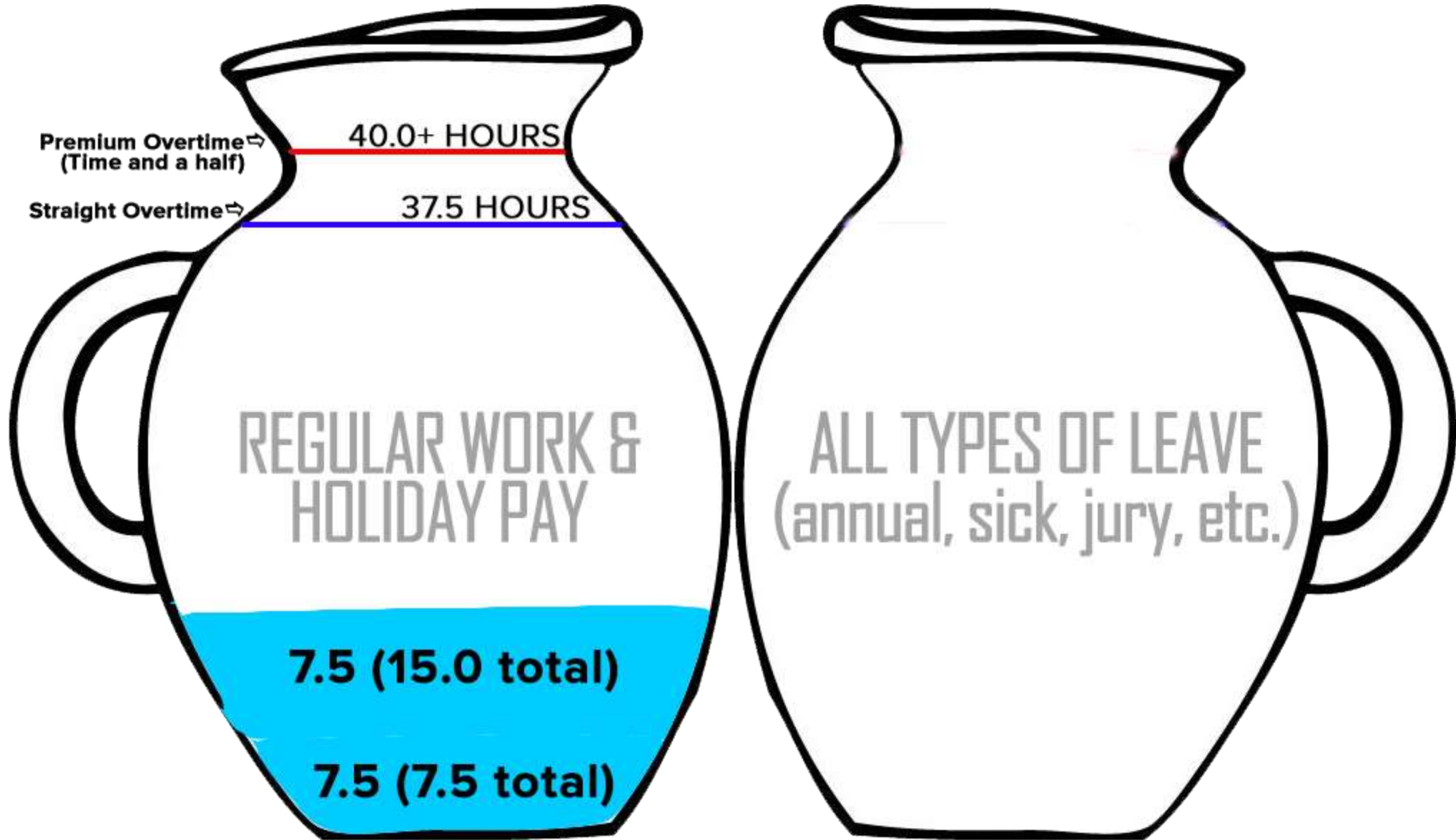
Straight Overtime

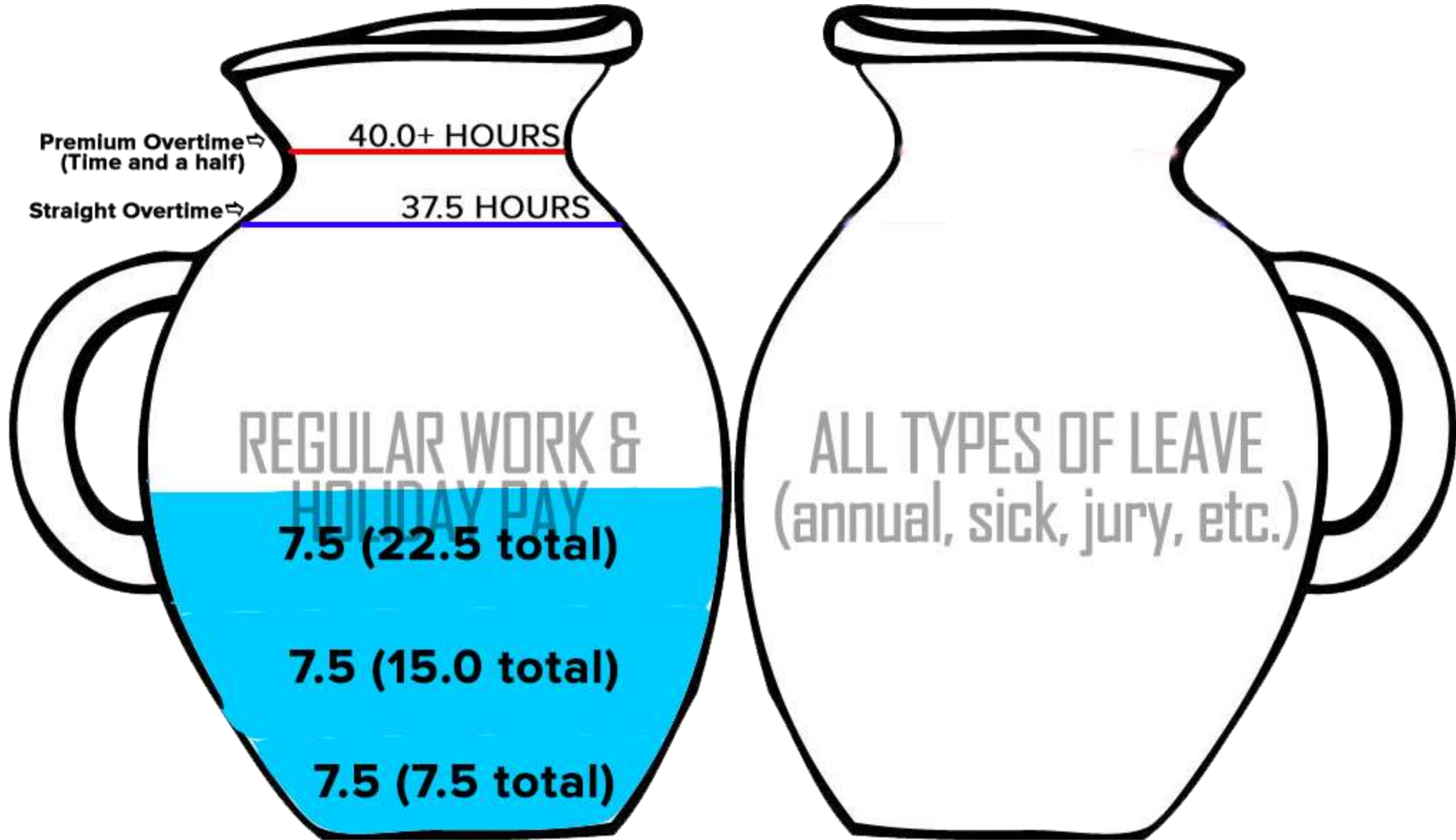
37.5 HOURS

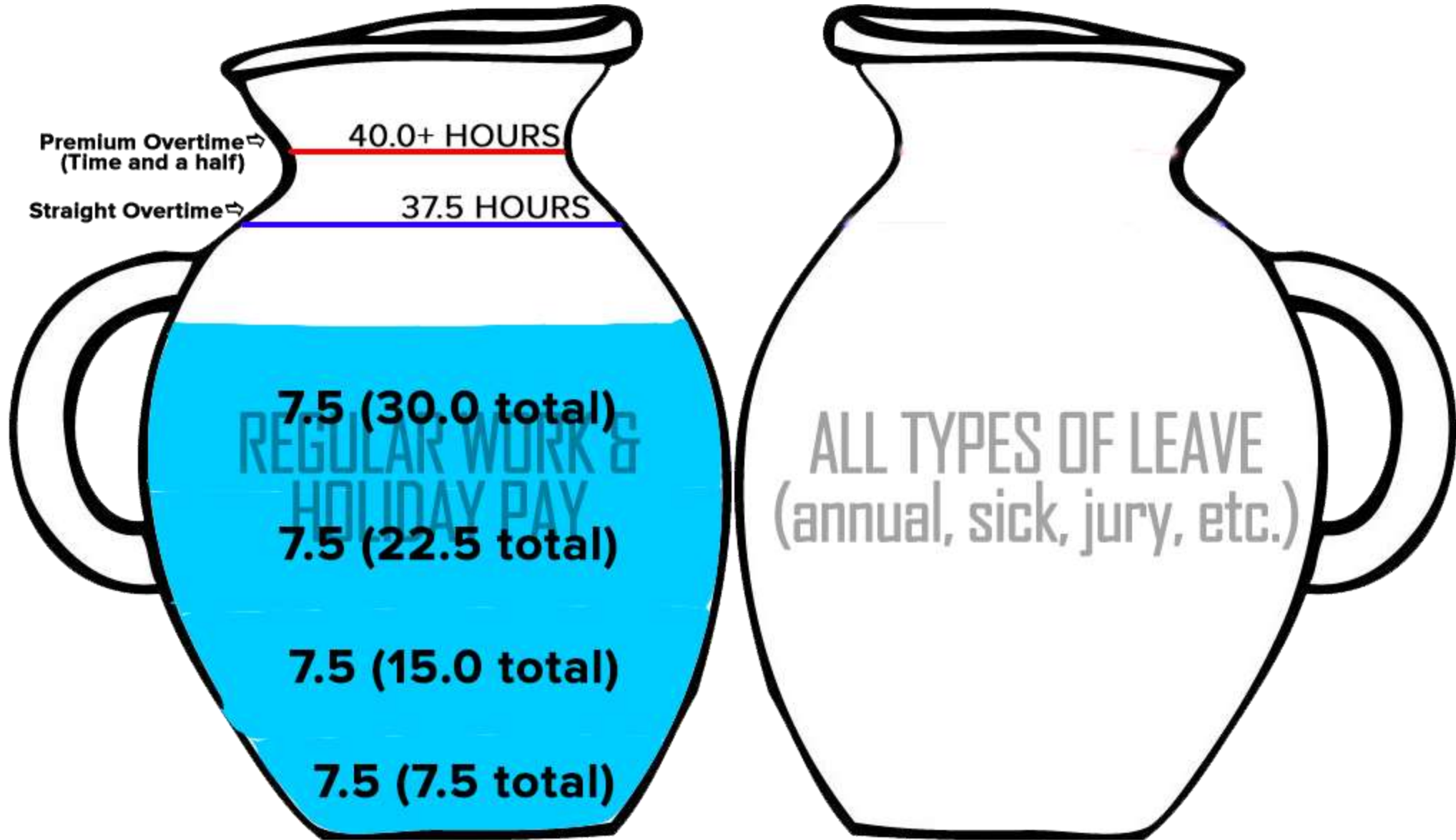
REGULAR WORK & HOLIDAY PAY

ALL TYPES OF LEAVE  
(annual, sick, jury, etc.)

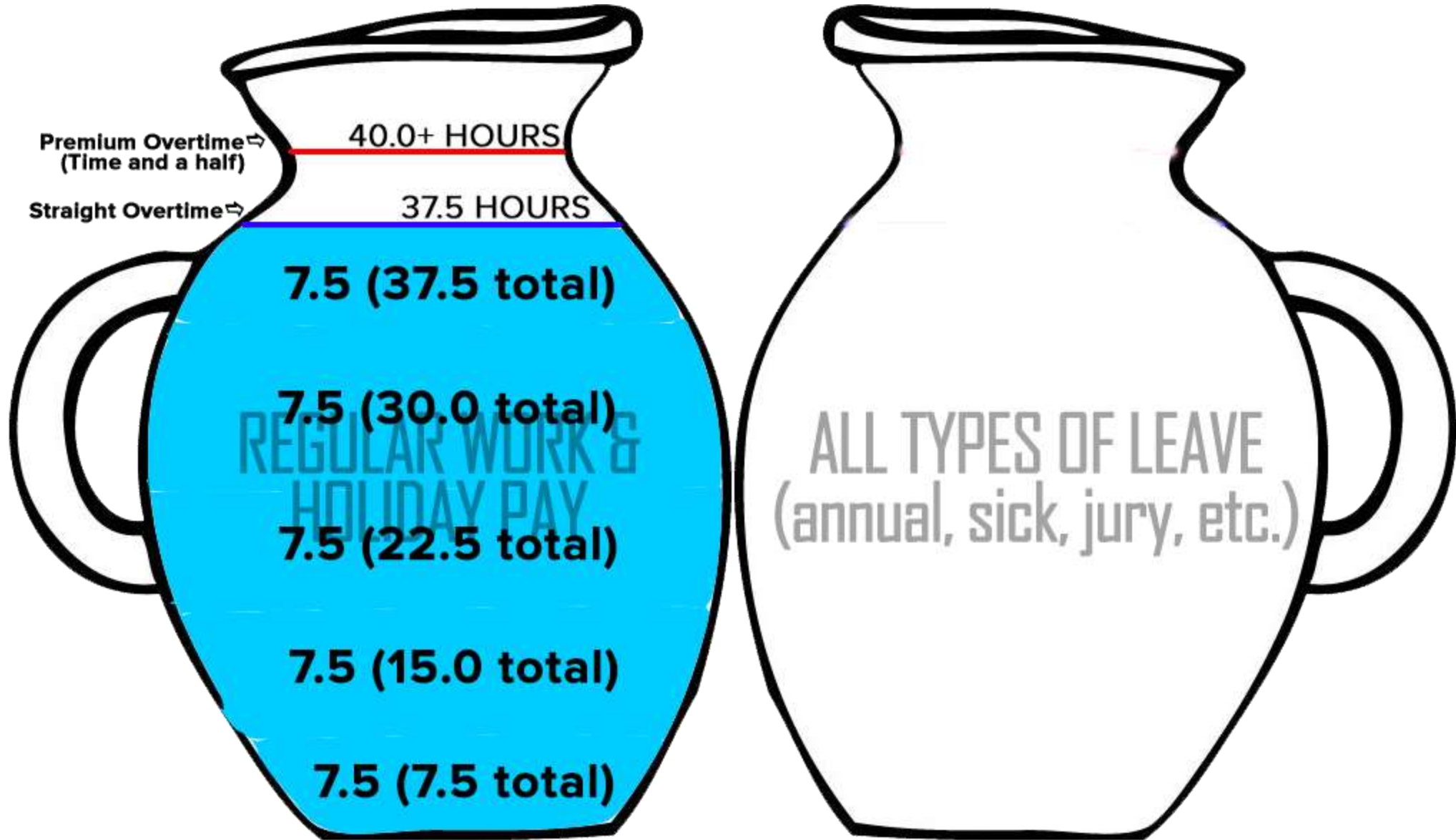


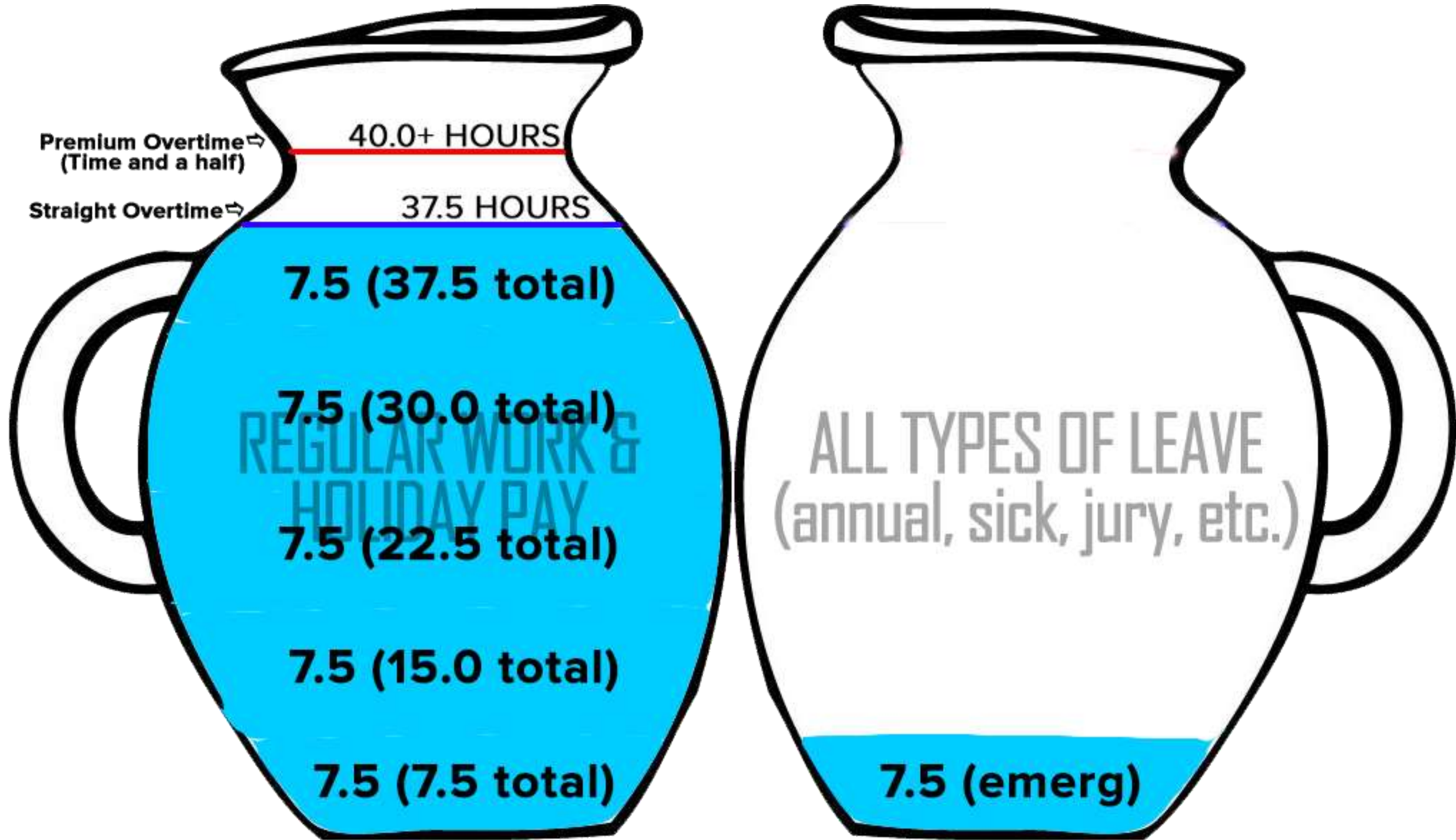


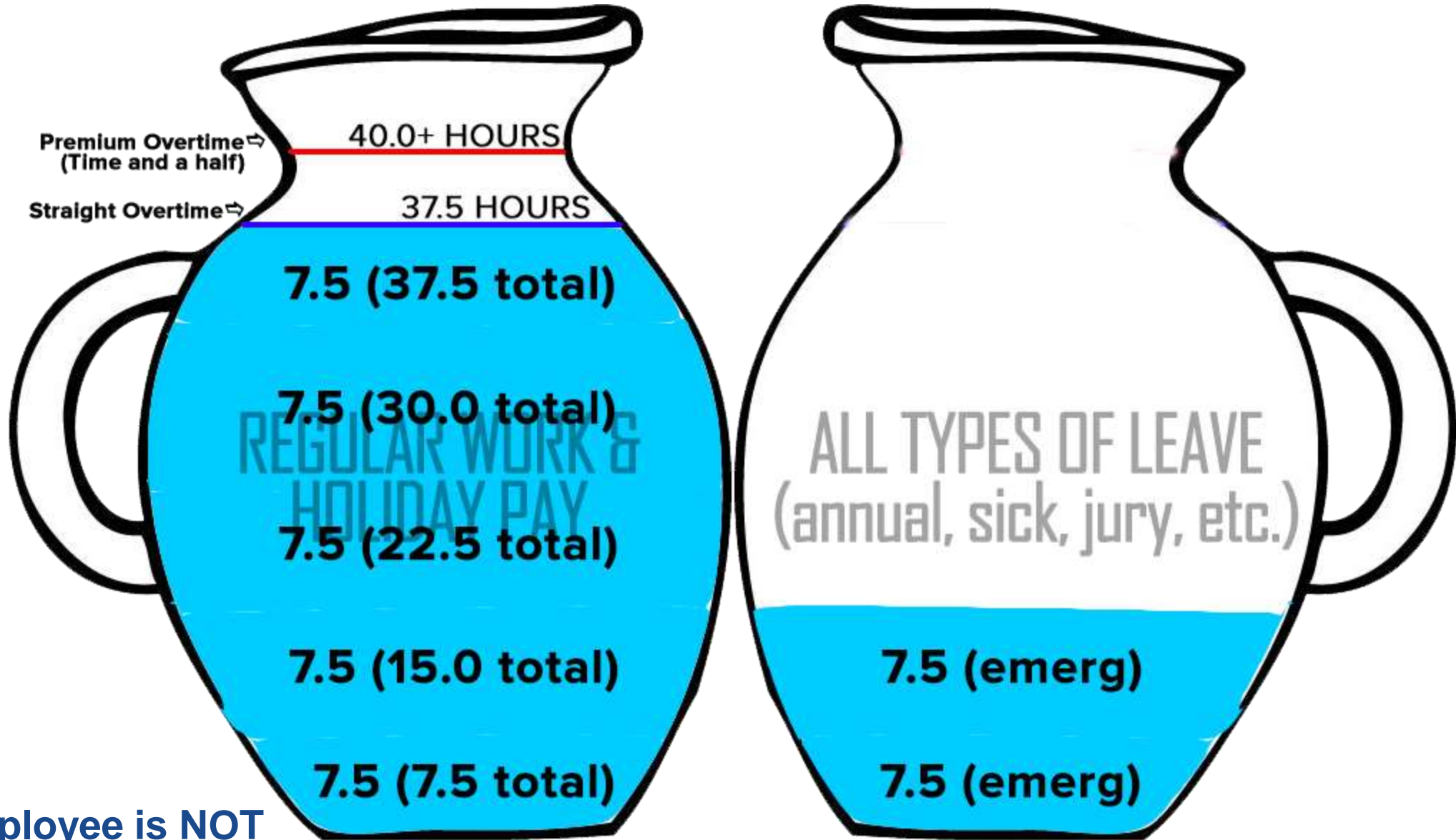












This employee is NOT due any overtime.



**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](mailto:hr@memphis.edu)



# Announcements & Deadlines

- Remember to review the University's current job openings at [workforum.memphis.edu](http://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

## **NEW CES FACULTY & STAFF**

## **EVENT GUIDELINES RESOURCE PAGE:**

- [memphis.edu/uc/departments-event-guidelines](https://www.memphis.edu/uc/departments-event-guidelines)
- Features multiple event components with links and emails to assist with on-campus event planning.
- Downloadable Faculty & Staff event checklist included on side menu.
- Student event guide for Registered Student Organizations available as well for those of you who are faculty sponsors of an RSO:  
<https://www.memphis.edu/uc/student-guidelines>





# Announcements & Deadlines

## CES DEPARTMENT EVENT GUIDELINES RESOURCE PAGE:

- [memphis.edu/uc/department-event-guidelines](https://memphis.edu/uc/department-event-guidelines)

Building Information   Scheduling   **Department Event Guidelines**   Student Event Guidelines   Resources

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**DEPARTMENT EVENT GUIDELINES**   Home > Maxine A. Smith University Center > Department Event Guidelines

FACULTY & STAFF EVENT CHECKLIST

**FORMS**

[POLICY MANUAL](#)

[SCHEDULING FACILITIES](#)

**TAKE ACTION**

[CONTACT US](#)

[EVENTS CALENDAR](#)

[ROSE THEATRE](#)

[STUDENT EMPLOYMENT](#)

EVENT COMPONENT	DEPARTMENT & CONTACT	RESOURCES	NOTES
Academic Building & Classroom Access	Reach out to specific department or Registrar's Office <a href="mailto:registrar@memphis.edu">registrar@memphis.edu</a> Space Planning & Utilization <a href="https://memphis.edu/space">memphis.edu/space</a>	<a href="#">Click HERE for VEMS Portal</a>	Access to spaces other than University Center (UC) or Rose Theatre (RTH) must be requested via <b>Virtual Event Management Software (VEMS)</b> with all details being coordinated through the departmental contact for that space. If a space is not available in VEMS, please contact the department overseeing the space.  If you are needing a key for a specific building, reach out to Physical Plant's Lock shop.
Admission or Registration	CES Scheduling Office <a href="mailto:scheduling@memphis.edu">scheduling@memphis.edu</a> Phone: 901.678.5000	CES Coordinators can assist. <a href="#">Click HERE for UC &amp; Rose Theatre Users Guide</a>	Additional fees apply for events charging admission. Must use TigerTix for ticketing. Use of platforms such as Eventbrite not permitted. No cash ticket sales.
Alcohol	Office of the President: LaTondra Amett <a href="mailto:larnett@memphis.edu">larnett@memphis.edu</a>	<a href="#">Click HERE for Alcohol Request Form</a>	Form <b>MUST</b> be submitted for approval <b>AT LEAST SEVEN BUSINESS DAYS</b> prior to event date.  <b>NOT PERMITTED FOR REGISTERED STUDENT EVENTS.</b>



# Announcements & Deadlines

- The Staff Satisfaction Survey from the Staff Senate will be open through March 22, 2024.
- This correlates to Goal #5 in the Ascend strategic plan.
- As an institution, we will be measuring employee satisfaction on an annual basis to better address employee morale & campus culture.
- If you have not already completed it, you may do so [here](#).



# Announcements & Deadlines

## **New/Revised Policies**

- IT6009: Information Technology Security Awareness Training Program
- AA3006: Insurance for International Students
- AA3035: Student Criminal and Disciplinary History: Pre-Admission and Post Admission Review Policy
- GE2054: Contact with Local Officials, State Officials, Federal Officials, Political Campaigns and Other Political Activities



# Announcements & Deadlines

## **Financial Planning Spring Budget Due Dates:**

Friday, March 15, 2024

- Revenue Projection Budget Revisions Due

Monday, March 25, 2024

- Capital / R&R / Facility Project Budget Revisions Due
- Expenditure and Position Budget Revisions Due

Friday, April 5, 2024

- BD4 Online Budget Revisions Due



# 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

- If you were a recipient of a Career Milestone Award last month, please remember you have points (dollars) to spend in Awardco at [memphis.awardco.com](https://www.memphis.awardco.com).
- Points can be spent throughout Amazon or in the UofM's own swag shop.



# Announcements & Deadlines

- Faculty performance appraisals evaluating performance in 2023 kicked off in WorkforUM on January 2, 2024.
- 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

- Staff performance appraisals in SAMS are due April 30, 2024 for all non-probationary staff employees.
- The rating choices on the University's staff performance appraisal tool (SAMS), located at <https://www.memphis.edu/performance>, have been updated for 2023-24 reviews. The three previously offered choices were increased to five:
  - **Outstanding:** Performance consistently exceeded job expectations and delivered exceptional results in all areas.
  - **Highly Effective:** Performance occasionally exceeded job expectations. Uniformly high quality of work.
  - **Effective:** Performance routinely met job expectations. Job well done.
  - **Marginally Effective:** Performance occasionally met job expectations but was inconsistent. Performance Plan likely necessary.
  - **Unacceptable:** Job expectations not met. Immediate action required via employment status decision or Performance Plan.



# Announcements & Deadlines

- These changes are the only ones made for the 2023-24 cycle, because employees must be evaluated on the specific factors established at the beginning of the evaluation period which started May 1, 2023. These currently include Service Excellence/Communication, Collaboration/Teamwork, Productivity, Initiative, Job Knowledge, and in some cases, Leadership and an Optional Factor.
- However, HR plans to update these factors upon which staff employees are rated with the 2024-25 cycle, and these changes will include new factors and verbiage that relates to the new Ascend strategic plan. In this year's training sessions for managers, it is being announced that the areas that staff employees will be evaluated on will be updated next year, and the same will be communicated to the campus at large. Training sessions are now available in Learning Curve.



# Announcements & Deadlines

## **Upcoming HR Events: More Information Coming Soon**

- MPLOY
- Take Our Daughters and Sons To Work Day
- Registration links forthcoming



# Announcements & Deadlines

## **Records Inventory Due May 31, 2024**

- Trainings in [Learning Curve](#) under University Records Management Training



# Announcements & Deadlines

## **Next Effective Search Committees training:**

- April 11, 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](mailto:i9@memphis.edu).
- Other questions? [i9@memphis.edu](mailto:i9@memphis.edu)



# Announcements & Deadlines

- Career Services is hosting the Spring All Majors Career Fair on March 20 from 10am-3pm in the UC Ballroom.
- Open to all current students and alumni.





# 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: April 16, 2024 @ 2:30pm**

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