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
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
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?
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

<table>
<thead>
<tr>
<th>Decal</th>
<th>Description</th>
<th>Book Value</th>
<th>Net Value</th>
<th>Make</th>
<th>Model</th>
<th>Serial Number</th>
<th>Acq Date</th>
<th>Location</th>
<th>Locn</th>
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</thead>
<tbody>
<tr>
<td>01324000</td>
<td>EXT60128101-DTP Cross/Point 108</td>
<td>10,223</td>
<td>7,931</td>
<td>Extron</td>
<td>DTP CrossPoint 108</td>
<td>AIWRQ8</td>
<td>04/10/17</td>
<td>Administration 107</td>
<td>100024</td>
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<tr>
<td>01334400</td>
<td>Media Site ML820 Recorder</td>
<td>9,755</td>
<td>7,723</td>
<td>Mediasite</td>
<td>ML-820</td>
<td>003-5990020</td>
<td>03/14/17</td>
<td>Administration 107</td>
<td>100024</td>
</tr>
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</table>

- Correction Samples

<table>
<thead>
<tr>
<th>Decal</th>
<th>Description</th>
<th>Book Value</th>
<th>Net Value</th>
<th>Make</th>
<th>Model</th>
<th>Serial Number</th>
<th>Acq Date</th>
<th>Location</th>
<th>Locn</th>
</tr>
</thead>
<tbody>
<tr>
<td>013094400</td>
<td>Atomic Layer Deposition System</td>
<td>80,700</td>
<td>44,365</td>
<td>Ensure Scientific Group</td>
<td>Atomic Layer</td>
<td>ABC123456</td>
<td>01/13/15</td>
<td>Manning Hall 420</td>
<td>101186</td>
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<td>013094500</td>
<td>Dual Tube Furnace</td>
<td>47,930</td>
<td>25,962</td>
<td>MTI Corporation</td>
<td>Dual Tube Furnace</td>
<td>56584</td>
<td>12/03/14</td>
<td>Manning Hall 420</td>
<td>101186</td>
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<tr>
<td>013094600</td>
<td>correct accot code I0565734</td>
<td>9,100</td>
<td>4,853</td>
<td>Edwards 366 Vacuum</td>
<td>*</td>
<td>XY2255</td>
<td>11/11/14</td>
<td>Manning Hall 420</td>
<td>101186</td>
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<td>013094700</td>
<td>Potentiostat/Galvanostat</td>
<td>5,538</td>
<td>2,907</td>
<td>Gamry Instruments</td>
<td>Potentiostat/Galvanost</td>
<td>Q15-269</td>
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<td>013201500</td>
<td>DLR Raman Microscope, a confocal</td>
<td>49,500</td>
<td>31,762</td>
<td>Thermo</td>
<td>**</td>
<td>714-0299000</td>
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<td>013556000</td>
<td>Experiments Kit with 25mm2</td>
<td>16,025</td>
<td>13,621</td>
<td>Amptek</td>
<td>Experimenter's kit</td>
<td>1)</td>
<td>01/08/18</td>
<td>Manning Hall 221</td>
<td>101669</td>
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</table>

* Advanced Series 4567
** Fisher IV -777
1) 967XYW26GHMN
## Items in Department – Not on Inventory

### Before adding item to the list:
- **Make sure that it costs more than $5,000** (assets that are less than $5,000 are not included in Inventory Confirmation)
- Verify asset through FFIMAST (System Status Code - if "D" or "C", asset has been previously disposed/cancelled, do not add it to the list)
- Verify asset through FFIMAST (Organization - asset could belong to other ORG and need to be transferred using WT, do not add it to the list)

<table>
<thead>
<tr>
<th>Purchase Order #</th>
<th>Decal #</th>
<th>Description</th>
<th>Asset Type</th>
<th>Make</th>
<th>Model</th>
<th>Serial Number</th>
<th>Location Code</th>
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<tbody>
<tr>
<td></td>
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</tbody>
</table>
**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”.

<table>
<thead>
<tr>
<th>Asset Tag</th>
<th>014153000</th>
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</thead>
<tbody>
<tr>
<td><strong>MASTER INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Origination Tag</td>
<td>T00.146377</td>
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<tr>
<td>Permanent Tag</td>
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<tr>
<td>Primary Tag</td>
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<tr>
<td>Subordinate Type</td>
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<tr>
<td>Origination Tag Date</td>
<td>2/14/2020</td>
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<tr>
<td>Permanent Tag Date</td>
<td>1/3/2020</td>
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<tr>
<td>Last Adjustment Date</td>
<td></td>
</tr>
<tr>
<td>Origination Tag Cancel Date</td>
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</tr>
<tr>
<td>System Status Code</td>
<td>J</td>
</tr>
<tr>
<td>Source Journal Voucher</td>
<td></td>
</tr>
<tr>
<td>Asset Type</td>
<td>FR</td>
</tr>
<tr>
<td>Furniture</td>
<td></td>
</tr>
</tbody>
</table>
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).
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.
FFIPROC – Fixed Asset Procurement Query

Additional information may be found using the Banner INB FFIPROC page by purchase order #, serial #, description or other parameters.
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 list of location codes can be viewed at https://umwa.memphis.edu/programguides/search-locations.php
Resources

• Questions / Issues
  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=UHpUMVZwNllRc1U5TWdIMENhTTdTUT09
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.
# Report of Lost or Stolen Property

**Lost or Stolen University Property Policy**

*Date:*

## Instructions:
1. Complete Sections A. B. and C. and submit to University Police Services via email to umpolice@memphis.edu.
2. Forward a copy to the Accounting Office via email to acctpolice@memphis.edu.
3. Complete a separate form for each missing asset.

## Asset Information

<table>
<thead>
<tr>
<th>Name/Description of Asset</th>
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<tbody>
<tr>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>University Serial No.</th>
<th>Make</th>
<th>Model</th>
<th>Serial Number</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Department</th>
<th>Org Code</th>
<th>Approximate Value</th>
<th>Original Cost (if known)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Date Discovered/Missing</th>
<th>Last Known Location of Asset</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Circumstances of Loss

- Select one: 
  - Lost/missing
  - Stolen
  - No

If yes, forward this form to ITS at umpolice@memphis.edu with "Lost Computer" in the subject line of the email.

**Was an external police report filed?**

- Yes (complete fields below)
- No

**State of Police Department**

**Case No.**

**Additional information regarding loss of asset:**

- 

## Remarks

**Prepared by:**

**Department/Activity Head**

**Date**

**Dean/Division Head**

**Date**

## University Police Services (Not Daily)

**Received by:**

**Date**

**Action taken:**

- 

**Investigation Pending**
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.)
REGULAR WORK & HOLIDAY PAY

40.0+ HOURS

37.5 HOURS

7.5 (7.5 total)

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

Premium Overtime (Time and a half)
Straight Overtime
REGULAR WORK & HOLIDAY PAY

7.5 (15.0 total)
7.5 (7.5 total)

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

Premium Overtime (Time and a half)

40.0+ HOURS

Straight Overtime

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

REGULAR WORK &
HOLIDAY PAY

Premium Overtime
(Time and a half)

40.0+ HOURS

37.5 HOURS

7.5 (30.0 total)

7.5 (22.5 total)

7.5 (15.0 total)

7.5 (7.5 total)

Straight Overtime
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.
Regular Work & Holiday Pay

Premium Overtime (Time and a half)

40.0+ Hours

Straight Overtime

37.5 Hours

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

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

7.5 (7.5 total)
REGULAR WORK & HOLIDAY PAY

- 7.5 (15.0 total)

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

- 7.5 (7.5 total)

Premium Overtime (Time and a half)

- 40.0+ HOURS

Straight Overtime

- 37.5 HOURS
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.)
Premium Overtime (Time and a half)
40.0+ HOURS

Straight Overtime
37.5 HOURS

7.5 (33.0 total)
10.5 (25.5 total)
7.5 (15.0 total)
7.5 (7.5 total)

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

4.5 (37.5 total)

7.5 (33.0 total)

10.5 (25.5 total)

7.5 (15.0 total)

7.5 (7.5 total)

All Types of Leave (annual, sick, jury, etc.)
40.0+ HOURS
2.5 (40.0 total)
37.5 HOURS
4.5 (37.5 total)
7.5 (33.0 total)
10.5 (25.5 total)
7.5 (15.0 total)
7.5 (7.5 total)
REGULAR WORK & HOLIDAY PAY
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.
REGULAR WORK & HOLIDAY PAY

40.0+ HOURS

PREMIUM OVERTIME (Time and a half)

37.5 HOURS

STRAIGHT OVERTIME

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

7.5 (7.5 total)

ALL TYPES OF LEAVE
(annual, sick, jury, etc.)
Premium Overtime (Time and a half)

40.0+ HOURS

Regular Work & Holiday Pay

7.5 (15.0 total)

Straight Overtime

37.5 HOURS

All Types of Leave (annual, sick, jury, etc.)

7.5 (7.5 total)
REGULAR WORK & HOLIDAY PAY

11.0 (26.0 total)
7.5 (15.0 total)
7.5 (7.5 total)

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

7.5 (sick)
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)

Straight Overtime

40.0+ HOURS

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

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

7.5 (7.5 total)
REGULAR WORK & HOLIDAY PAY
7.5 (15.0 total)
ALL TYPES OF LEAVE
(anual, sick, jury, etc.)
7.5 (7.5 total)
Premium Overtime (Time and a half)
40.0+ HOURS

Straight Overtime
37.5 HOURS

REGULAR WORK & HOLIDAY PAY
7.5 (22.5 total)
7.5 (15.0 total)
7.5 (7.5 total)

ALL TYPES OF LEAVE (annual, sick, jury, etc.)
Premium Overtime (Time and a half)
40.0+ HOURS

Straight Overtime
37.5 HOURS

7.5 (30.0 total)
7.5 (22.5 total)
7.5 (15.0 total)
7.5 (7.5 total)

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

7.5 (37.5 total)
7.5 (30.0 total)
7.5 (22.5 total)
7.5 (15.0 total)
7.5 (7.5 total)

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

Premium Overtime
(Time and a half)

37.5 HOURS

Straight Overtime

7.5 (37.5 total)

7.5 (30.0 total)

7.5 (22.5 total)

7.5 (15.0 total)

7.5 (7.5 total)

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

7.5 (emerg)
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
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!

• Subscribe to our WorkforUM Twitter feed at @umemphisjobs!

• Follow us on Instagram! @uofmhr
NEW CES FACULTY & STAFF
EVENT GUIDELINES RESOURCE PAGE:

- [memphis.edu/uc/department-event-guidelines](http://memphis.edu/uc/department-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](https://www.memphis.edu/uc/student-guidelines)
## CES DEPARTMENT EVENT GUIDELINES RESOURCE PAGE:

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

• 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!
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

• 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