FOCUS ON FINANCE & HR

APRIL 19, 2022
Today’s Agenda

- FMLA Leave on Time Sheets/Leave Reports
- FY22 Year-End Close
- Softdocs Adjustment Time Sheet Demo
- Adobe Fill & Sign (LinkedIn Learning)
- Announcements & Deadlines
FMLA Leave on Time Sheets & Leave Reports

• Beginning in April 2022, time sheets (4/9) and leave reports (4/1) for regular employees will include a new line item for “FMLA Leave.”

• This new line item is **ONLY** to be used by employees who are officially recognized by Human Resources as being on an approved FMLA leave on or after April 1. (Hint: If you don’t have a FMLA Designation Notice/E-Mail, it’s not FMLA!)

• IMPORTANT: Employees may NOT use this line item without HR having approved their FMLA status. HR will be notified if this happens!
FMLA Leave on Time Sheets & Leave Reports

• Those employees who ARE on approved FMLA leave should ONLY enter their hours used on this new FMLA Leave line item; do NOT enter entries on the Sick Leave or Annual Leave line items in these cases. (This will cause double-dipping.)

• FMLA Leave has been automatically programmed to deduct appropriately from the employee’s sick and then annual leave balances.

• This new line item should only be used by employees who start an approved FMLA leave on or after April 1 (or 9), 2022.

• Employees who were already on FMLA Leave prior to April 1, 2022 should not change the method in which they are already reporting their leave.
FMLA Leave on Time Sheets & Leave Reports

• Employees on Paid Parental Leave (PPL) should continue to report their hours on the Paid Parental Leave line item. PPL should NEVER be reported as FMLA Leave.

• HR is implementing this new process as part of an improved method of tracking FMLA eligibility and leave usage within Banner.

• If you have any questions about this new FMLA Leave line item on your timesheets/leave reports OR if you have FMLA questions in general, please e-mail hrbp@memphis.edu.
**Time and Leave Reporting**

Select the link under a date to enter hours or days. Select Next or Previous to navigate through the dates within the period.

I certify that the time and/or leave entered represents a true and accurate record of my time and/or leave. I am responsible for any changes made to this record using my ID.

---

**Leave Report**

**Title and Number:**
Assoc Dir Funct Online Sol -- 009361-00

**Department and Number:**
Human Resources -- 520000

**Leave Report Period:**
Mar 01, 2022 to Mar 31, 2022

**Submit By Date:**
Apr 10, 2022 by 04:30 PM

<table>
<thead>
<tr>
<th>Earning</th>
<th>Total Hours</th>
<th>Total Units</th>
<th>Tuesday Mar 01, 2022</th>
<th>Wednesday Mar 02, 2022</th>
<th>Thursday Mar 03, 2022</th>
<th>Friday Mar 04, 2022</th>
<th>Saturday Mar 05, 2022</th>
<th>Sunday Mar 06, 2022</th>
<th>Monday Mar 07, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Leave</td>
<td>0</td>
<td></td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Sick Leave</td>
<td>0</td>
<td></td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Inclement Weather</td>
<td>0</td>
<td></td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Bereavement Leave</td>
<td>0</td>
<td></td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Military Leave</td>
<td>0</td>
<td></td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Jury Duty</td>
<td>0</td>
<td></td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Voting Leave</td>
<td>0</td>
<td></td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>FMLA Leave</td>
<td>0</td>
<td></td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Vaccine Admin Leave</td>
<td>0</td>
<td></td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
</tbody>
</table>

**Total Hours:** 0

**Total Units:** 0
Questions?
FY22 Year-End Close

Shan Arnold, Assistant Controller
Accounting Office
FY22 Year-End Close To Do List

• Complete all travel claims
• Settle travel and supply advances
• Settle purchase card claims
• Review and request de-obligation of non-travel purchase orders (Goods/Services)
• Travel purchase order do not roll to the new fiscal year
• Ensure that all invoices for Goods and Services are forwarded to Accounts Payable
• Submit invoices for FY22 accruals
FY22 Year-End Close To Do List

- Review FGRODTA – Transaction Detail Report (ePrint Report)
- Ensure FY22 fixed asset purchases are properly tagged
- Submit transfer vouchers for FY22 corrections
## FY22 Year-End Close Unrestricted Deadline

<table>
<thead>
<tr>
<th>Activity</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book Airfare Reservation via Travelenium for Travel in FY-22</td>
<td>Monday, June 06, 2022</td>
</tr>
<tr>
<td>Cancel, Adjust, De-obligate Remaining Balances on FY22 Purchase Orders Non-Travel Purchase Orders- <a href="mailto:procurement@memphis.edu">procurement@memphis.edu</a> Travel Purchase Orders- accounts <a href="mailto:payable@memphis.edu">payable@memphis.edu</a></td>
<td>Friday, June 17, 2022</td>
</tr>
<tr>
<td>Time Sheet for BW13 Biweekly Payroll (June 4th - June 18th)</td>
<td>Friday, June 17, 2022</td>
</tr>
<tr>
<td>Completed FY22 Purchase Order by Receipting Goods and Services in Tigerbuy for All Vendors, including Staples. Send Receipt # and Invoice to accounts <a href="mailto:payable@memphis.edu">payable@memphis.edu</a></td>
<td>Monday, June 20, 2022</td>
</tr>
<tr>
<td>Settle Cash and Travel Advances for FY-22 accounts <a href="mailto:payable@memphis.edu">payable@memphis.edu</a></td>
<td>Monday, June 20, 2022</td>
</tr>
<tr>
<td>Online Budget Revisions between Account Pools- Financial Planning <a href="mailto:fprevisions@memphis.edu">fprevisions@memphis.edu</a></td>
<td>Monday, June 20, 2022</td>
</tr>
<tr>
<td>Last Day to Submit Invoices, Travel / Cash Advance Claims and Reimbursements to Accounting for FY22 accounts <a href="mailto:payable@memphis.edu">payable@memphis.edu</a></td>
<td>Wednesday, June 29, 2022</td>
</tr>
<tr>
<td>Time Sheet for Split BW14 Biweekly Payroll (June 18th - July 1st)</td>
<td>Thursday, June 30, 2022</td>
</tr>
<tr>
<td>Submit FY22 Transfer Vouchers <a href="mailto:accounting@memphis.edu">accounting@memphis.edu</a></td>
<td>Friday, July 08, 2022</td>
</tr>
<tr>
<td>Submit Invoices for FY22 Accruals to Accounting <a href="mailto:accounting@memphis.edu">accounting@memphis.edu</a></td>
<td>Start Accepting Accruals Friday, July 01, 2022</td>
</tr>
<tr>
<td></td>
<td>End Date for Accepting Accruals Friday, July 15, 2022</td>
</tr>
</tbody>
</table>
Questions?
FY22 Year-End Close

LINDA HEIDE
MANAGER, GRANTS AND CONTRACTS ACCOUNTING
<table>
<thead>
<tr>
<th>Activity</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stop Grant Spending to Ensure Grant Billing for grants that ending June 30th. All purchase orders must be received, receipted, and paid by June 30th. Be mindful of spending down a grant in the last 90 days.</td>
<td>Friday, May 20, 2022</td>
</tr>
<tr>
<td>Completed FY22 Purchase Order by Receipting Goods and Services in Tigerbuy for All Vendors, including Staples. Send Receipt # and Invoice to accounts <a href="mailto:payable@memphis.edu">payable@memphis.edu</a></td>
<td>Friday, May 27, 2022</td>
</tr>
<tr>
<td>Settle Cash and Travel Advances for FY-22 accounts <a href="mailto:payable@memphis.edu">payable@memphis.edu</a></td>
<td>Friday, May 27, 2022</td>
</tr>
<tr>
<td>Cancel, Adjust, De-obligate Remaining Balances on FY22 Non-Travel Purchase Orders- <a href="mailto:procurement@memphis.edu">procurement@memphis.edu</a> Travel Purchase Orders- <a href="mailto:accounting@memphis.edu">accounting@memphis.edu</a></td>
<td>Friday, June 17, 2022</td>
</tr>
<tr>
<td>Online Budget Revisions between Account Pools- Financial Planning <a href="mailto:fprevisions@memphis.edu">fprevisions@memphis.edu</a></td>
<td>Monday, June 20, 2022</td>
</tr>
<tr>
<td>Submit Receipts for May 2022 Purchase Card Expenses</td>
<td>Thursday, June 30, 2022</td>
</tr>
<tr>
<td>Last Day to Submit Invoices, Travel / Cash Advance Claims and Reimbursements to Accounts Payable for FY22 accounts <a href="mailto:payable@memphis.edu">payable@memphis.edu</a></td>
<td>Thursday, June 30, 2022</td>
</tr>
<tr>
<td>Submit FY22 Transfer Vouchers- <a href="mailto:accounting@memphis.edu">accounting@memphis.edu</a></td>
<td>Friday, July 08, 2022</td>
</tr>
</tbody>
</table>
Questions?
Adjustment Time Sheet Demo

• Beginning April 19, the online Adjustment Time Sheet underwent a facelift and has been moved to the University’s new Softdocs vendor platform.

• The adjustment time sheet is used to correct time submissions for non-exempt (biweekly paid) employees whose timesheets have already been approved but need corrections.

• NOTE: Need changes to an approved exempt (monthly paid) employee’s leave report? Submit a Monthly Employee/Faculty Leave Record Adjustment form to hrdata@memphis.edu. (Available on B&F Forms Website)

• Let’s do a sample Adjustment Time Sheet so you can see how the new form works.
Enter the Payroll Year: 2022  
Select the Pay Period: B  
Start Date: 03/26/2022  
End Date: 04/08/2022  

Enter the Banner ID: U100379898  
Employee Name: Jason Williams  
Select the Position-Suffix: 003339 - 00  

Position Title: Custodian  
Org Number: 424020  
Department Name: Custodial Services Residence Life

**Detailed Adjustment Hours**

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

<table>
<thead>
<tr>
<th>Date of Change</th>
<th>Earnings</th>
<th>Hours Changed ±(+)</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/04/2022</td>
<td>Holiday Pay [150]</td>
<td>9.00</td>
</tr>
<tr>
<td>03/30/2022</td>
<td>Parental Leave [175]</td>
<td>2.50</td>
</tr>
</tbody>
</table>

**Total Hours**

<table>
<thead>
<tr>
<th>Regular</th>
<th>OTS</th>
<th>OT</th>
<th>Annual</th>
<th>Sick</th>
<th>Holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>9.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other</th>
<th></th>
<th>Total Hours: 11.50</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.50</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select Person to Approve form:

Approver/Proxy:  
Email: 
Demonstration
Questions?
Adobe Fill and Sign Demo from LinkedIn Learning

DANNY LINTON
Adobe Fill & Sign

• With the University moving away from the use of DocuSign later in 2022, many online form templates are moving to Softdocs.
• But what about the times when you need a PDF form signed one-time-only, and don’t need a template that will be used over and over?
• For these one-offs, consider using Adobe Fill & Sign, which is available via your Acrobat Reader software.
• Let’s watch a quick 5-minute video from the University’s LinkedIn Learning account that explains how Adobe Fill & Sign works.
• Remember, LinkedIn Learning is available for free under your MyMemphis Employee tab and offers thousands of training opportunities for FREE.
View Video in LinkedIn Learning
Questions?
Announcements & Deadlines
Announcements & Deadlines

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

• Don’t forget to review the University’s current job openings at workforum.memphis.edu.

• Follow the Division of Business & Finance on Twitter at @uofmemphisbf!

• Subscribe to our WorkforUM Twitter feed at @umemphisjobs!

• Follow us on Instagram! @uofmhr
Announcements & Deadlines

- **Todd Deese**, who many of you might have worked with in the Registrar’s Office, has moved to the Graduate School and is now the Director of Graduate School Services.

- This is the role previously held by Jim Kierulff, so Todd will be working with many of you as you process upcoming GA e-contracts.

- Speaking of which...
• ...the Graduate Assistant E-Contract process has been overhauled and will look, feel, and function differently beginning with Fall 2022 appointments.

• Additional sessions of GA E-Contract training have been added to Learning Curve to accommodate the expected extra demand.

• If you are responsible for any GA contracts for your department, please plan to attend a session in June!
Announcements & Deadlines

Staff Performance Appraisals in SAMS:

• Due April 30, 2022 and should reflect the standard appraisal period of May 1, 2021 thru April 30, 2022 in most cases.

• Online Training is now available in Learning Curve. Look for “Staff Appraisals Made Simple.” You may also access this online training directly via this link.

• The SAMS system is available online at memphis.edu/performance.
Announcements & Deadlines

Attention AIG/VALIC ORP Members

• AIG Retirement Services (formerly known as VALIC) will cease to be an active provider in the ORP and 403(b) Plan on September 1, 2022.
• New employees electing the ORP plan will only select from TIAA & Voya as retirement options upon hire.
• Existing AIG/VALIC members will be contacted by the State to transfer their accounts to a different ORP vendor.
• Non-respondents will automatically be transferred to TIAA.
Announcements & Deadlines

• REMEMBER: to access the Finance Program Guide, HR Program Guide, or Learning Curve, users must be using an on-campus computer OR be connected remotely to the University’s VPN.

• Otherwise, these sites or anything else on the B&F web server will not load as expected.
Announcements & Deadlines

• Procurement Deadline!

• The Deadline for current year (FY22) Change Order Requests is **Monday, May 16.**

• Please review Purchase Orders with an open encumbrance in Banner and enter a Change Order Request in Tigerbuy to cancel, adjust or de-obligate encumbrances; however, we request that you enter your Change Order Request as soon as possible to avoid delays.
Announcements & Deadlines

Separation & Clearance:

• Please remember to immediately complete online separation notices for any employees you have that are departing the University!

• Not doing so can lead to an audit finding because the employee would still have access to University systems.

• [https://umwa.memphis.edu/sep-clear](https://umwa.memphis.edu/sep-clear)
University Records Management Training

Dates:
- Thursday, May 5 at 10am
- Friday, May 20 at 10am
- Wednesday, June 8 at 10am
- Thursday, June 16 at 2:30pm
- Friday, June 24 at 11am

Sign up in Learning Curve!
2022 E-Contract trainings already scheduled are:

- Part-Time Faculty
- Temporary Employees
- Student Workers
- Extra Compensation
- Graduate Assistants (REMEMBER! Changing this fall! Everyone should attend!)
- Faculty Summer Compensation handled by the Provost’s Office
- Sign up in Learning Curve!
Announcements & Deadlines

Quarterly WorkforUM trainings have been scheduled in Learning Curve for 2022:

- April 27
- July 27
- October 26

- Sign up in Learning Curve!
Announcements & Deadlines

Upcoming Finance trainings:

- Web Time Entry
  May 17, 2022
  10:30am

- Accounting Basics
  June 24, 2022
  10:00am

- Sign up in Learning Curve!
Values in Action (VIA)

- New workshop series where employees will learn how to incorporate the University’s Values in their daily actions. Sessions will be hosted on Zoom at midday, so you can watch and learn while enjoying your lunch.
- Latest sessions are available directly at https://www.memphis.edu/hr/via.php.
- April 22 @ Noon: Women and Heart Disease
- May 13 @ Noon: How to Better Manage Stress
- June 13 @ Noon: Understanding Sexuality & Gender Diversity
Announcements & Deadlines

Form I-9 Information:

• Appointments not needed during regular business hours.

• Visit 143 Administration Building M-F 8-4:30.

• Questions? i9@memphis.edu
Announcements & Deadlines

ARE YOU FEELING OVERWHELMED?

The State of Tennessee’s Employee Assistance Program can help.

- The EAP is available for all benefits-eligible employees and their dependents, 24/7/365.
- You do not have to be enrolled in health insurance to take advantage.
- The EAP can help with work-related, personal and/or financial issues.
- You may receive five EAP visits per situation per year at no cost to you.
- All conversations are confidential.

For authorization, call or visit: 855-HERE4TN or Here4TN.com
Announcements & Deadlines

TOPICS FOR FUTURE MEETINGS
Announcements & Deadlines

• Need someone added to the Focus on Finance & HR mailing list?

• Don’t forward to them—forward to us!

• hr@memphis.edu
NEXT MEETING

Tuesday, May 17, 2022
2:30 p.m.

Web: memphis.edu/focus
Meetings: memphis.edu/focuszoom