

An aerial photograph of a university campus during a vibrant sunset. The sky is filled with soft, colorful clouds in shades of purple, pink, and orange. The campus below is a mix of brick buildings, green lawns, and trees. A prominent tall brick tower is visible in the lower center. The overall scene is peaceful and scenic.

Welcome to Focus on Finance & HR!

May 18, 2021



Agenda

- Graduate Scholarship New Process
- Return to Campus Update
- Internal Audit Awareness Month
- Implications of Working Without a Social Security Number
- Tigerbuy User Interface Update
- Announcements & Deadlines



GRADUATE SCHOLARSHIP NEW PROCESS

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Current Operational Context of Grad Student Funding

- Through Summer 2021
- GA eContracts (Stipend & Tuition, Stipend Only)

The screenshot displays the EContracts portal interface. At the top, the University of Memphis logo and 'ECONTRACTS' title are visible. The navigation bar includes links for Home, Program Guides, Reference, and Search for Contracts. The user is logged in as James. The main content area is divided into three columns:

- Messages:** A section with a circular icon of three people. It contains a description and a list of contract statuses with counts:
 - 8 Incomplete GA contract(s).
 - 15 GA contract(s) pending exception approval.
 - 102 GA contract(s) pending Graduate School approval.
 - 3 GA contract(s) not accepted by the student.
- Applications (A-Z):** A list of application types:
 - Extra Compensation
 - Faculty Summer Compensation
 - Graduate Assistant Appointments** (highlighted in yellow)
 - Part-time Faculty Appointments
 - Shared Services Center Processing
 - Sponsored Internships MOU
- Applications Bookshelf:** A list of reports and appointment types:
 - Reports
 - Extra Compensation
 - Faculty Summer Compensation
 - Graduate Assistant Appointments
 - Part-time Faculty Appointments
 - Sponsored Internship MOU
 - Temporary Employee Appointments

- GAs receive scholarships “down to the in-state rate.” Centrally administered.

Student/Department Assistance as of Fall 2021



- Outcome of GA Working Group and PIP
- For Fall 2021 going forward.
- Three forms of Graduate Student Compensation Categories
 - Graduate Scholarships
 - Tuition, only.
 - Recipients are not employees.
 - Can have a service component (or not).
 - Amount of assistance determined by department/school/college.
 - Tuition/fee bill not covered by department assistance will be the responsibility of the given student.
 - Graduate Assistantships (GAs)
 - Tuition and stipend, GA eContract.
 - Employment contracts, exempt (monthly) or non-exempt (hourly).
 - Graduate Student Workers
 - Stipend, only, GA eContract.
 - Employment contracts, exempt (monthly) or non-exempt (hourly).
- Encouraged to move office help to capable undergraduate students.



Budget Sources

- Central Budget Allocation Moved to Colleges/Schools
 - Funds used to scholarship your GAs down to the in-state rate during the 2019_20 academic year have been released to your colleges/schools along with respective GA pool funds.
 - In addition to GA pool.
 - Implication: student and department will be paying tuition at the student's specific residency rate.
- Please remember to encourage prospective and current domestic GAs to apply for Federal Work Study (via FAFSA) if they have not already.

Current Tuition Assistance Form



- The current PDF/paper form (see below) has been transformed into a web form (for Graduate Students) by ITS.



Request for Departmental Tuition Waiver

Submit e-mail completed form to the bursar_ar@memphis.edu OR fax to (901) 678-0288 OR deliver to 115 Wilder Tower.

This form should be used to request tuition/fee waivers to be paid by department and/or grant index.

Please allow 3-5 business days from date received in University & Student Business Services for processing requests. Please check the [USBS Web site](#) for the fee payment deadlines for each term. Completed form can be faxed to 901-678-0288 or e-mailed to bursar_ar@memphis.edu. (Form should be scanned & attached to email.) For best results, printing should be done with landscape format.

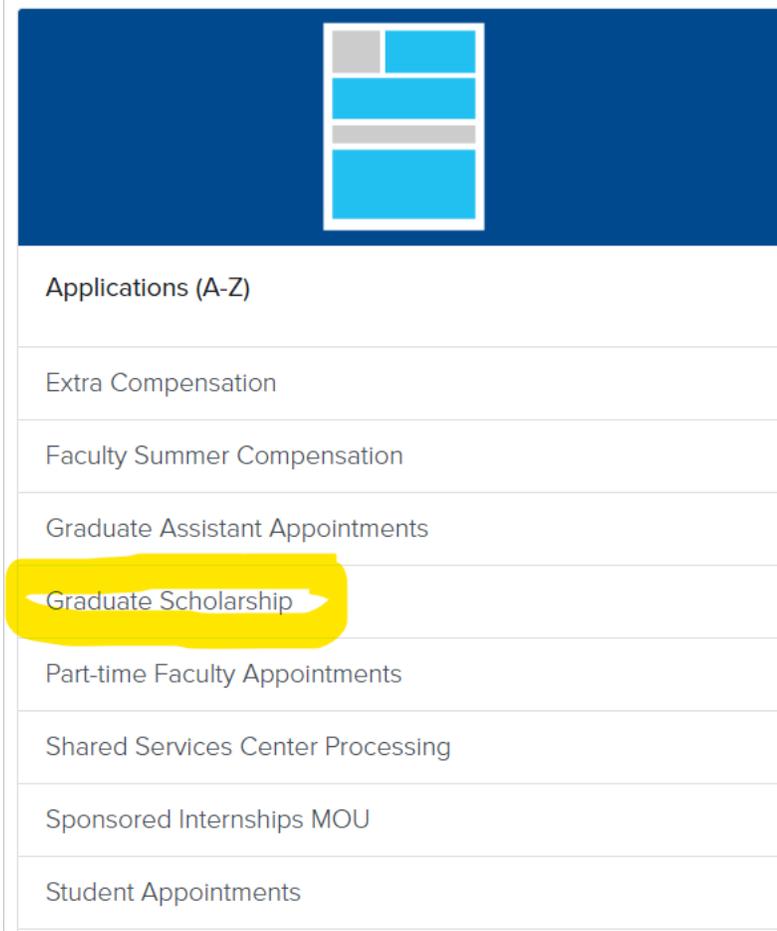
TO BE COMPLETED BY DEPARTMENT

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New Tuition Assistance Form

- “Graduate Scholarship” link on eContracts system



New Tuition Assistance Form



- [View New Form](#)



RETURN TO CAMPUS UPDATE

Kristil Davis

Director, Strategic HR Initiatives & Talent Management



Return to Campus

- On June 1, 2021, campus will resume operating at approximately 75% density.
- On July 1, 2021, campus will resume operating at 100% density.



Return to Campus

- For June 1, your department should review your original Return to Campus plans from 2020 and make revisions to them as appropriate.
- For example, some departments may have employees work staggered schedules or alternate workdays in the office. Keep in mind that departments should be staffed at all times the University is open for business, especially those departments that directly support students.



Return to Campus

- For July 1, all employees are expected to return to campus full-time.
- All existing AWAs will be considered expired as of June 30, 2021. A new form should be submitted if AWAs are being requested.



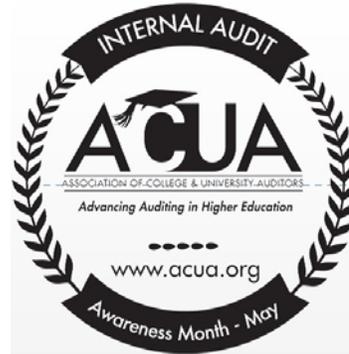
Return to Campus

- Keep in mind that requests of a medical nature for the employee may involve Americans with Disabilities Act (ADA) accommodations instead of Alternative Work Arrangements. More information about ADA is available [online](#).



Return to Campus

- Watch your campus communications for updates on mask and social distancing requirements once you are back on campus.
- A final reminder: you may need to remember to reactivate your campus parking permits before returning to campus.



INTERNAL AUDIT AWARENESS MONTH

Vicki D. Deaton
Chief Audit Executive

What is an Audit?



The word "audit" is traditionally defined as an examination of records or financial accounts to check their accuracy.

This definition implies that audits include only financial records and accounts.

An audit may best be defined as an appraisal of organizational processes in light of the goals and objectives of that organization and/or the goals and objectives of an external group (such as a regulatory agency).

What is Internal Audit?



According to the Institute of Internal Auditors (IIA) definition:

Internal auditing is an independent, objective assurance and consulting activity designed to add value and improve an organization's operations.

The Institute of Internal Auditors International Standards for the Professional Practice of Internal Auditing and Code of Ethics



- ▶ Independence
- ▶ Professional Proficiency
- ▶ Scope
- ▶ Performance of Audit
- ▶ Management
- ▶ Code of Ethics

Classic Myths About Internal Auditing



1. Internal auditors are accountants by training.
2. Auditors are nitpickers and fault-finders.
3. Internal auditors follow a cycle in selecting their audit “targets” and use standard checklists so they can audit the same things the same way each time.
4. Internal audit is the organization’s “police function.”



Who Are Internal Auditors?

Internal auditors are explorers, analysts, problem-solvers, reporters, and trusted advisors. They come from diverse areas such as finance, operations, IT, and engineering.

Still, people often confuse internal auditors with accountants or external auditors (entities the organization engages to provide an annual review of the financial statements).

Accounting vs. Internal Auditing



	Accounting	Internal Auditing
Area of Focus	<ul style="list-style-type: none">• Financial analysis• Transaction processing• Budgeting• Record keeping	<ul style="list-style-type: none">• Internal Controls• Compliance• Effectiveness and efficiency of operations• Governance structure• Risk management• Determining accuracy of financial reporting
Method of Working	<ul style="list-style-type: none">• Transaction processing• Cyclical financial reporting and budgeting	<ul style="list-style-type: none">• Project based• May include committee work and ongoing risk assessments
Certifications	CPA, CMA, <i>etc.</i>	CPA, CIA, CISA, CFE, <i>etc.</i>

Internal Auditors vs. External Auditors



	Internal Auditors	External Auditors
Area of Focus	<ul style="list-style-type: none">• Risk management• Corporate governance• Organizational objectives• Operational efficiency and effectiveness• Compliance with laws and policies• Safeguarding assets• Accurate financial statements	<ul style="list-style-type: none">• Accurate financial statements• Going concern
Scope	<ul style="list-style-type: none">• Backward-looking and forward-looking	<ul style="list-style-type: none">• Backward-looking or historical data• Compliance with accounting and other regulations
Backgrounds & Skills	<ul style="list-style-type: none">• Communication skills• Information technology• Data mining and analytics• Accounting skills	<ul style="list-style-type: none">• Accounting background and skills

Types of Auditors

External Auditors

- Hired by an organization
- Often financial statement or IT focus
- 25,000' view
- Produce a report with an opinion

Regulatory Auditors

- From a government agency or grantor
- May be called auditors, inspectors, compliance officers
- Ensure compliance with regulations
- Report, score card, or dashboard

Internal Auditors

- Work for the organization
- Risk-based audit plan
- Variety of audits based on industry
- Report or memo with recommendations

Internal Audit at the UofM



- ▶ Required by Tennessee Code
- ▶ Mission

The mission of Internal Audit is to provide independent, objective assurance and consulting services designed to add value and improve University operations. We help the University accomplish its objectives by systematically evaluating the effectiveness of risk management, control, and governance processes and recommending improvements when needed.

Internal Audit at the UofM



➤ Charter

The UofM Internal Audit Charter is approved by the UofM President, the CAE, and the Audit Committee. The Charter aligns with the Institute of Internal Audit (IIA) standards.

➤ Structure

- ▶ University employees
- ▶ Dual reporting responsibility to the President and to UofM Audit Committee of the Board of Trustees



Internal Audit Tasks at UofM

- ▶ Review functions and processes to determine if they support goals and objectives of UofM
- ▶ Investigate reports of fraud, waste, or abuse
- ▶ Investigate reports of conflict of interest
- ▶ Serve on various committees to provide advice
- ▶ Report results of all work to the Audit Committee

Internal Audit Responsibilities



- Offer insight and advice
- Evaluate risks
- Assess controls
- Ensure accuracy
- Improve operations
- Promote ethics
- Review processes and procedures
- Monitor compliance
- Assure safeguards
- Investigate fraud
- Communicate results and recommend action

Different Types of Internal Audit Projects

- ▶ Compliance Audits
- ▶ Operational Audits
- ▶ Consultations
- ▶ Investigations

Internal Audits May Be



- Risk-based Audits
- Required Audits
- Follow Up Audits

Risk-based Auditing

- ▶ Goal:
 - ▶ To identify areas in the University that have significant risks and to evaluate those areas to determine if those risks are being adequately managed.
 - ▶ Help keep bad things from happening
 - ▶ Help assure good things can happen

Evaluating Risks and Controls



- ▶ Help management understand:
 - Where their risks are
 - Are controls in place
 - Do the controls work
 - Are additional controls needed
 - Any unnecessary controls
 - Are the controls cost-effective
 - Are the risks worth taking

Audit Process

Planning

- Preliminary research
- Entrance Meeting
- Process discussions
- Information gathering
- Identification of scope items

Fieldwork

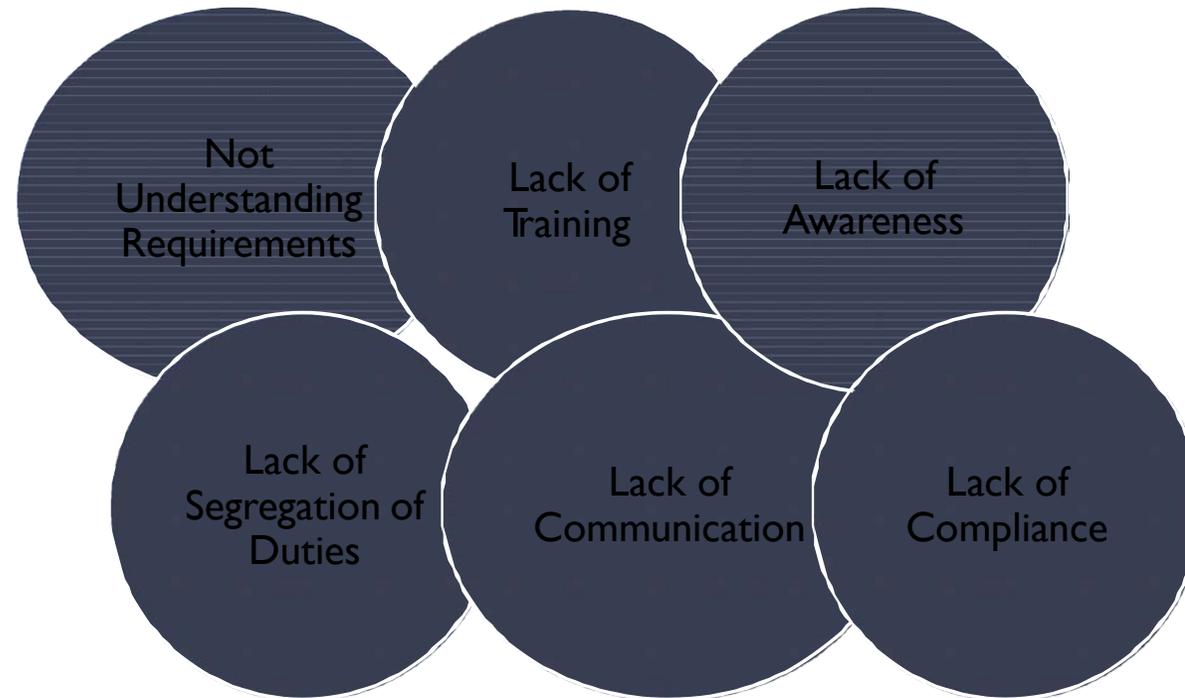
- Interviews
- Process reviews
- Document reviews
- Testing and verification
- Discussion of audit issues/findings

Reporting

- Develop draft audit report
- Exit meeting
- Management responses
- Final report distribution

CONTINUOUS COMMUNICATION

Common Causes of Audit Issues



Value of Internal Audit



- Find out what's working and what's not
- Bring organization-wide perspective
- Keep an eye on the organizational culture
- Look at the organization objectively
- Improve compliance
- Offer advice
- Advocate improvements and efficiencies
- Raise red flags
- Fraud prevention

Contacting Internal Audit



- ❖ If you want to contact us, we are available via...
UoM_Audit@memphis.edu or vddeaton@memphis.edu
- ❖ Or if you would like to visit us, we are located at 271 Administration Building.
- ❖ Options for reporting fraud at the University include:

Notify a University official

Contact Internal Audit at UoM_Audit@memphis.edu

Submit online at www.memphis.edu/audit



IMPLICATIONS OF WORKING WITHOUT A SOCIAL SECURITY NUMBER

Angela Wheeler-Lester
I-9 Coordinator, Human Resources



SSNs Are Important!

- All employees SHOULD have a Social Security Number so that wages can be filed with the IRS and the Social Security Administration.
- HR is seeing an increase in employees beginning work without an SSN on file.
- E-contracts and I-9 forms can still be processed without an SSN on file, but the work should not begin until one is on file.



Implications of No SSN

- E-contracts cannot be fully processed, meaning the job cannot be associated with the employee in Banner.
- Employees are not paid.
- Once an SSN is obtained, this creates extra work for HR and Payroll to retroactively pay the employee.
- The employee also has a slight risk of not being able to obtain an SSN even after work has been performed. This is rare but a serious issue when it occurs.



Watch Your Warnings

- Pay attention to the warnings on the e-contracts as you complete them. If you see that a hire does not have an SSN on file, advise them to visit the Social Security Administration as soon as possible. **DON'T ASSUME SOMEONE ELSE WILL HANDLE THIS.** Graduate assistants in particular need reminders for this.



SSA Contact Information

- The Social Security Administration's nearest location to campus is:

1330 Monroe Ave.
Memphis, TN 38104

Please note as of today, face-to-face services are still not being provided.

- Website: <https://www.ssa.gov>
- Locator for Other Locations: <https://secure.ssa.gov/ICON/main.jsp>
- Phone: 1-866-336-2212 (Monroe location)



Other Contact Information

- Human Resources
a.wheeler-lester@memphis.edu
901-678-3338
- International Students Office
theworld@memphis.edu
901-678-5918



TIGERBUY USER INTERFACE UPDATE: COMING IN JULY 2021

Kerri Reece

Procurement Card Administrator, Procurement & Contract Services

New User Interface



Sneak peek

The screenshot displays a modern web application interface for managing purchase orders. On the left is a dark sidebar with navigation icons for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Reporting, Administer, Setup, and Menu Search. The main content area shows a 'Purchase Order' for 'P0287131 Revision 0'. The top navigation bar includes a search function, currency (0.00 USD), and notification icons. Below the header, a breadcrumb trail shows 'Purchase Order' with a dropdown arrow, followed by ': P0287131 Revision 0'. A secondary navigation bar offers tabs for Status, Summary (active), Revisions (1), Confirmations (1), Shipments, Receipts, Invoices, Comments, Attachments, and History. The main content is divided into three columns: 'General Information' (PO/Reference No. P0287131, Revision No. 0, Priority Normal, Supplier Name Staples Contract and Commercial Inc), 'Shipping Information' (Ship To: Procurement Services, Memphis, TN), and 'Billing/Payment' (Bill To: University of Memphis, Memphis, TN). A 'Completed' summary box on the right shows a total of 210.40 USD. Below this, there are sections for 'Related Documents' (Requisitions: 143278432) and 'What's next?' (Workflow, Show skipped steps, Submitted 5/5/2021 12:21 PM).

New User Interface



Simple

Advanced

Go to: [Non-Catalog Item](#) | [Favorites](#) | [Forms](#) | [Shop](#) | [Quick Order](#) Browse: [Suppliers](#) | [Categories](#)

Advanced Search

Everything

Demo / Training in June's FOF meeting

Find Results That Have:



All of These Words

Supplier

Part Number (SKU)

Manufacturer Name

Commodity Code



Other Options



Exact Phrase

Exclude Words

Any of These Words



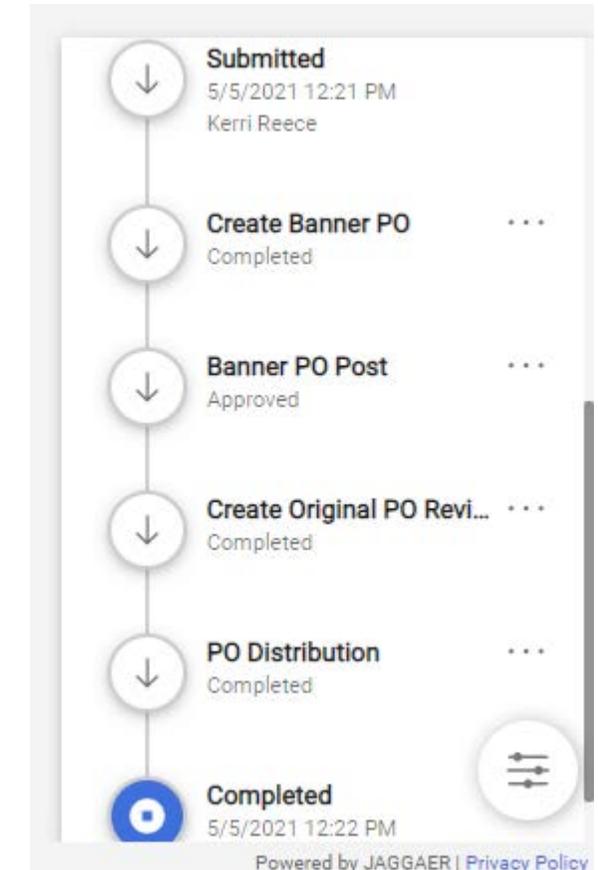
New User Interface

Purchase Order ▼ : P0287131 Revision 0 🖨️

Status Summary Revisions **1** Confirmations **1** Shipments Receipts Invoices Comments Attachr

Records found: 1

Confirmation No	Notice Date	Note from Supplier
0191489559	5/4/2021	



Testers wanted!

Email Kerri Reece: kreece@memphis.edu



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](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

- **GOOD NEWS REMINDER!**
- May 2021 will be a Health Insurance Premium Holiday period, meaning health insurance premiums will NOT be deducted from UofM employees' May paychecks.



Announcements & Deadlines

- As we approach the end of the fiscal year, employees are reminded to review their annual leave balances.
- Balances in excess of the maximum (as specified on the chart) will be transferred to sick leave at the close of the fiscal year, unless the employee is on terminal leave, in which case the full amount of accrued annual leave shall be carried forward. Employees should review their annual leave balances now to determine how many hours would need to be used prior to the June 30 roll date.
- Exempt (executive, administrative, professional, and twelve-month faculty employees) may carry forward 315 hours (42 days) to the next fiscal year. Any hours above this amount will be rolled over to sick leave.

Non-Exempt Employees Years of Service	Maximum Accumulation Carried Forward to Next Fiscal Year
0–5	225.0 hours
5–10	270.0 hours
10–20	292.5 hours
20 or more	315.0 hours



Announcements & Deadlines

Annual Records Inventory Due June 30

- New, all electronic process
- For details, register for training in Learning Curve



Announcements & Deadlines

- Be sure to keep your Work Location Status updated in the top middle section of the MyMemphis Employee tab.
- You may choose from Working on Campus, Working Remotely, or Hybrid (Both).
- This applies to ALL employees, including temps, GAs, part-time faculty, and student workers.

Announcements & Deadlines



REGULAR FACULTY/STAFF ONLY		
Working on Campus	657	27.4%
Working Remotely	793	33.1%
Hybrid (Both)	939	39.2%
No Answer Received	8	0.3%
TOTAL	2,397	100%

REGULAR FACULTY/STAFF + TEMPS & PTF		
Working on Campus	708	27.2%
Working Remotely	873	33.6%
Hybrid (Both)	997	38.3%
No Answer Received	24	0.9%
TOTAL	2,602	100%

ALL EMPLOYEES (INCLUDING TEMPS, PTF, STUDENT WORKERS, GAs, etc.)		
Working on Campus	911	27.7%
Working Remotely	1,080	32.9%
Hybrid (Both)	1,177	35.8%
No Answer Received	118	3.6%
TOTAL	3,286	100%

YOU GOTTA HAVE HEART



Thanks to everyone who participated in the 2021 Mid-South Heart Walk! Thanks to your support, we raised more than \$12,000!





Announcements & Deadlines

- Part-time faculty and graduate assistant e-contracts for credit instruction should now use service dates 21 days before the start of classes and 21 days after the end of classes.
- PTF e-contracts populate these dates automatically, but GA e-contracts do not, so please keep this in mind as you enter your fall contracts.



Year End 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 Accounting
- Submit invoices for FY21 accruals



Year End To Do List!

- Review FGRODTA – Transaction Detail Report (ePrint Report)
- Ensure FY21 fixed asset purchases are properly tagged
- Submit transfer vouchers for FY21 corrections



Announcements & Deadlines

May 2021 Accounting Training

- Accounts Payable: Check Request Form
May 25, 2:30pm
- General Accounting: Accounting Basics
May 26, 2:30pm

June 2021 Payroll Training

- Payroll: Form W-4
June 17, 11am
- Register in [Learning Curve!](#)



Announcements & Deadlines

- WorkforUM Training
July 28 at 9:30am (in person??)
Sign up in [Learning Curve](#)!
- E-Contract trainings for June have also been added to [Learning Curve](#).

Announcements & Deadlines

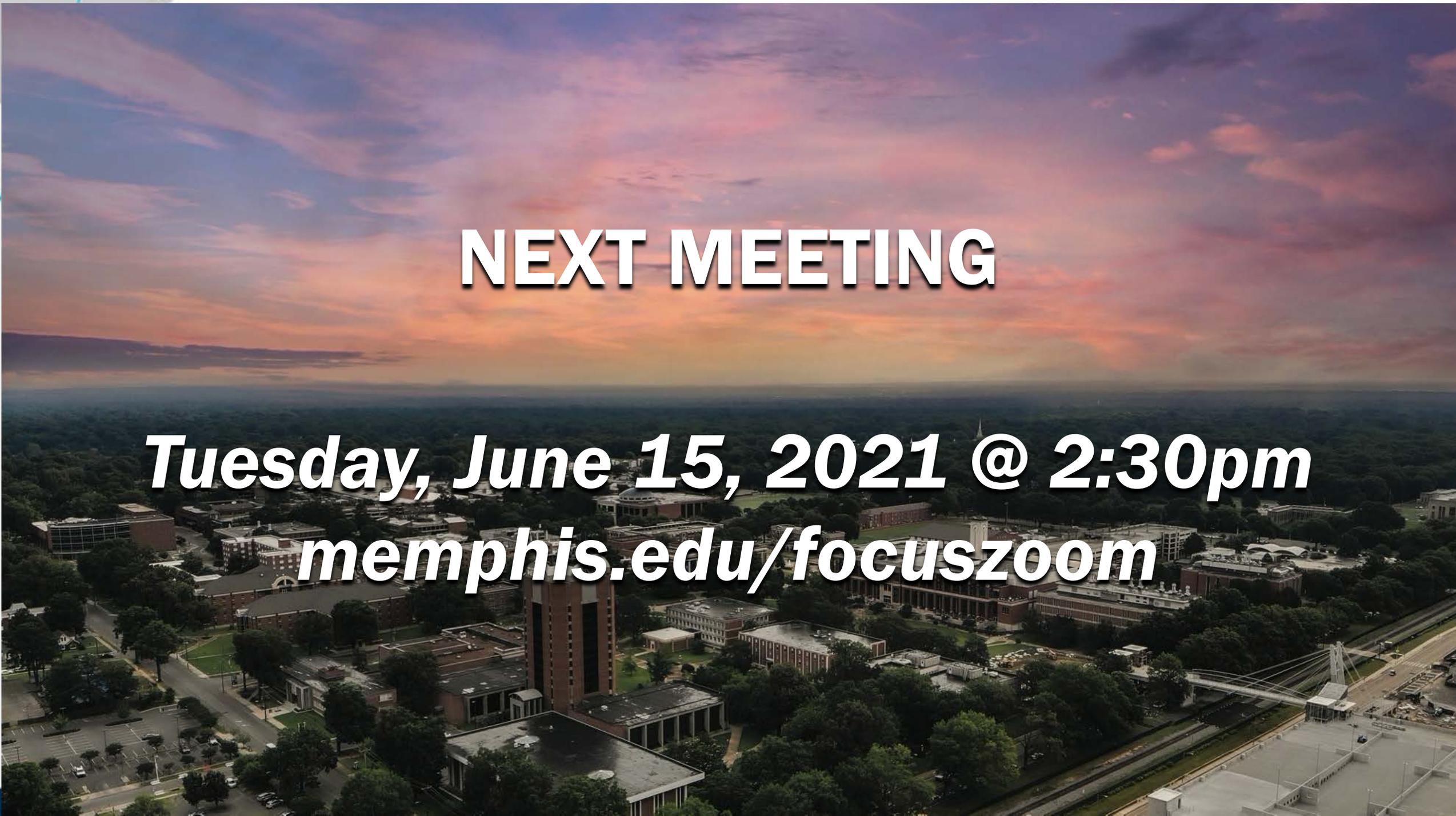


- Other Finance & HR Trainings can be held via Zoom, dependent upon demand.



Announcements & Deadlines

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

An aerial photograph of the University of Memphis campus during a vibrant sunset. The sky is filled with soft, colorful clouds in shades of orange, pink, and purple. The campus buildings, including a prominent tall brick tower, are visible below, surrounded by green trees and parking lots. The overall scene is peaceful and scenic.

NEXT MEETING

Tuesday, June 15, 2021 @ 2:30pm

memphis.edu/focuszoom

An aerial photograph of the University of Memphis campus during a vibrant sunset. The sky is filled with soft, colorful clouds in shades of orange, pink, and purple. The campus buildings, including a prominent tall brick tower, are visible below, surrounded by green trees and parking lots. The overall scene is peaceful and scenic.

THANK YOU FOR ATTENDING!

[memphis.edu/focus](https://www.memphis.edu/focus)