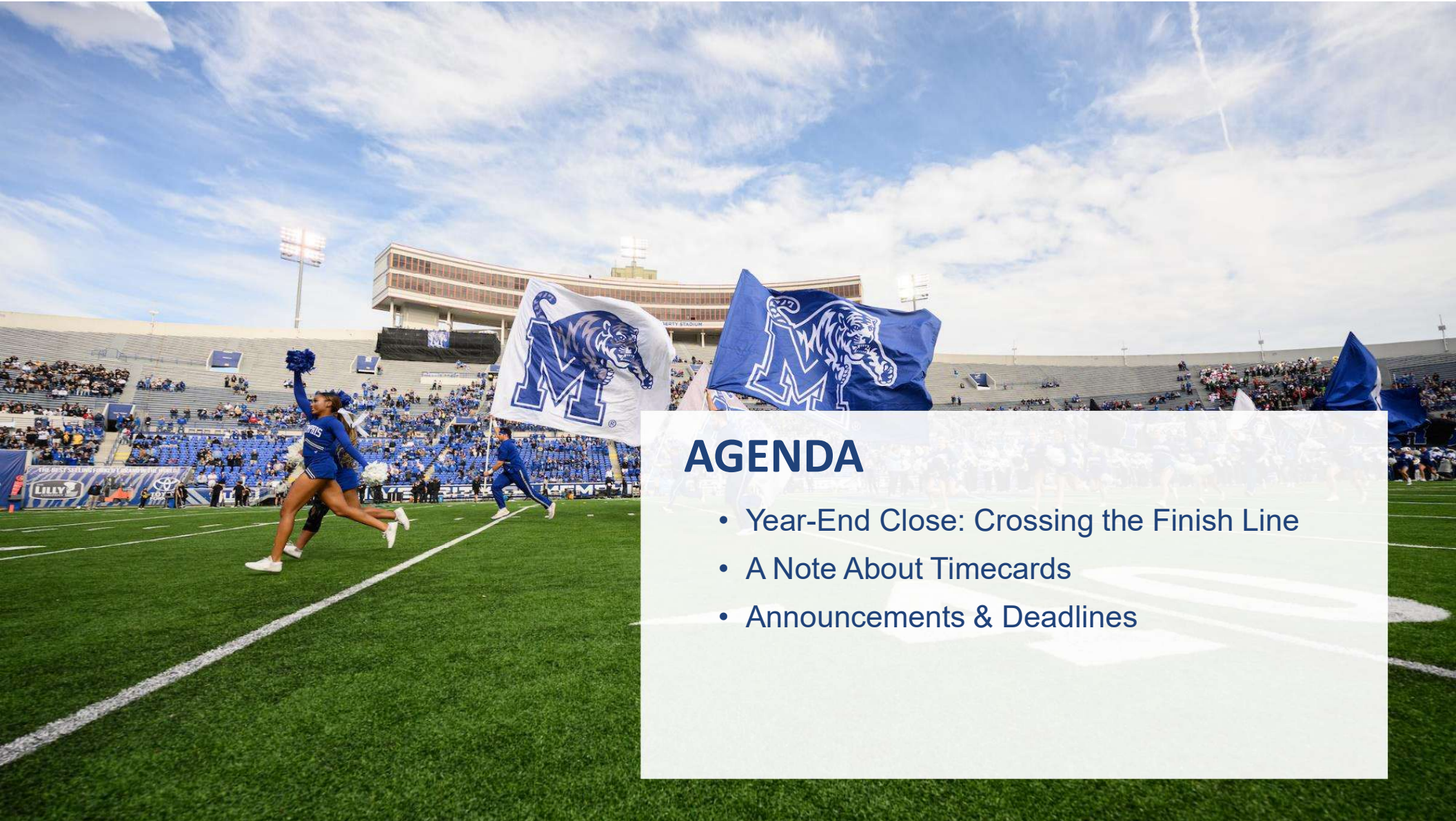




FOCUS ON FINANCE & HR

June 16, 2026



AGENDA

- Year-End Close: Crossing the Finish Line
- A Note About Timecards
- Announcements & Deadlines

Year-End Close: Crossing the Finish Line



Crystal Givens, Finance



Year-End Close Dates

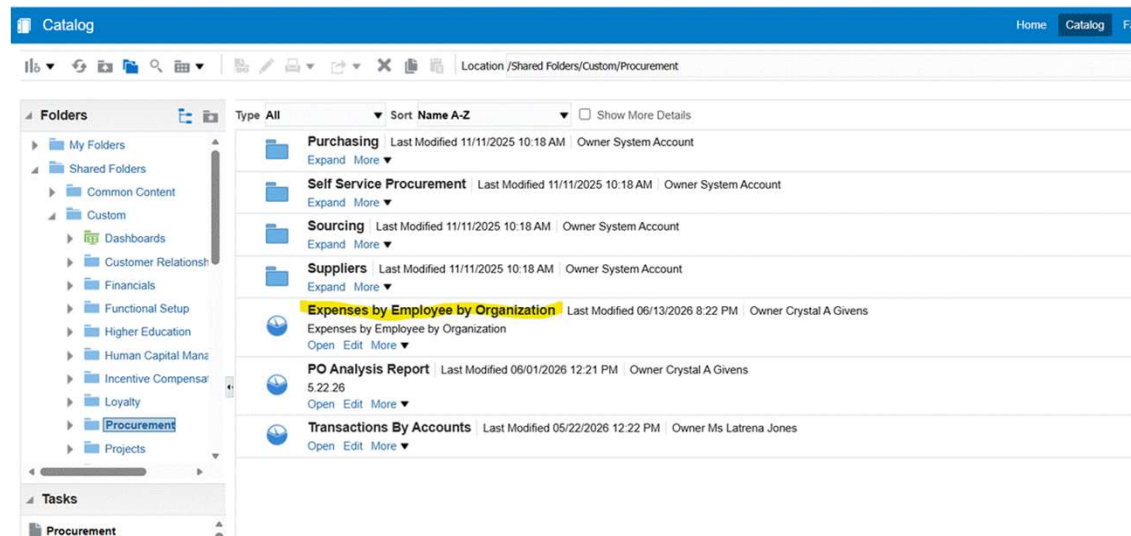
Who Can Help	What This is About	What You Need To Do	Due By
Procurement	Pcard Reconciliation	Load receipts into Oracle - Reconcile your Pcard expenses	Friday, July 3, 2026
Accounts Payable	Oracle Expenses	Oracle Expenses (formerly Chrome River) upload receipts and file expense reports for Travel and Non-Travel claims (Travel trips with end dates in June will be charged against FY26 funds)	Friday, July 3, 2026
Accounts Payable	Invoices	Early submission is strongly encouraged so the Accounts Payable team can process invoices timely. If invoices are sent directly to your department, please submit the request for payment to apinvoice@memphis.edu by the deadline date. Ensure you include the approved invoice, purchase order number and COA (chart of accounts) on the invoice.	Tuesday, July 7, 2026
Grants Accounting	Person Costing/Labor Redistribution	Complete Labor Redistributions	Wednesday, July 8, 2026
Grants Accounting	Cost Transfers	Complete Grant Related Cost Transfers	Wednesday, July 8, 2026
Accounting	Journals	Submit final FY26 journal entries into Oracle	Friday, July 10, 2026



Oracle Expenses

How to run the Expenses by Employee by Organization query in Oracle

- In Oracle navigate to Tools, Reports and Analytics, Browse Catalog, on the folder menu, click Shared Folders, Custom, Procurement, then click “Open” for the report called “Expenses by Employee by Organization”





Oracle Expenses

How to run the Expenses by Employee by Organization query in Oracle

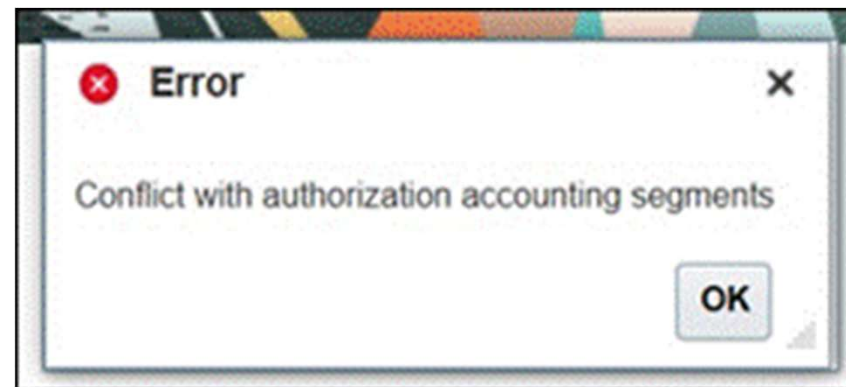
- Select at least one parameter – for example, the organization number.
- Click Ok
- The data can be exported or viewed on screen.

The screenshot shows a web interface for the 'Expenses by Employee by Organization' query. It features a blue header bar with the query name and a refresh icon. Below the header, there are two dropdown menus: 'Employee Name' and 'Organization', both currently set to '--Select Value--'. To the right of these dropdowns are 'OK' and 'Reset' buttons. At the bottom left of the form area, there are links for 'Edit - Refresh - Copy'.

Common Expense Report Errors

Conflict with authorization accounting segments

- This means the expense report line does not exactly match the authorization line
 - Mismatches with COA, template, or type





Common Expense Report Errors

How and where to notate purchasing card reconciliations on the expense report so Purchasing can identify it

- When creating the expense report, remember to enter any one of the following in the "Purpose" field:
 - "Pcard" or "PCard" or "P-Card" or "Purchasing Card"

The screenshot shows a web form titled "Create Expense Report" with a help icon. The form includes the following fields and controls:

- Report Name:** A text input field.
- Attachments:** A dropdown menu currently set to "None".
- * Purpose:** A text input field containing "Pcard, PCard, P-Card, Purchasing Card". This field is highlighted with a yellow background.
- Affiliation:** A dropdown menu.
- * Start Date:** A date input field with a calendar icon, showing the format "mm/dd/yyyy".
- * End Date:** A date input field with a calendar icon, showing the format "mm/dd/yyyy".

Below the form fields is a section titled "Expense Items" with a toolbar containing the following buttons and controls:

- Actions:** A dropdown menu.
- + Create Item:** A button with a plus sign.
- Add Existing:** A button.
- Apply Project:** A button with a dropdown arrow.
- Apply Account:** A button with a dropdown arrow.

Finance Reminders

Visit the Accounting website

<https://www.memphis.edu/accounting/>

- Click the Year-End Information link
- There are four documents listed:
 1. **Start Here:** FY26 Year-End Close: What You Need to Know (FAQ)
 2. How to Access Year-End Oracle Account Analysis Report
 3. **UPDATED:** FY26 Year-End Close Deadlines
 4. FY26 Cubical Checklist



https://www.memphis.edu/accounting/yearend.php

Accounting

Staff Directory | Areas | Travel | Effort Certification | Research Participant Payments | Links | Finance Program Guide

Home > Accounting > Year-End Information

TAKE ACTION

- Resources & Presentations
- Year-End Information**
- Forms
- Contact Us

Year-End Information

- **FY26 Year-End Close: What You Need to Know (FAQ)**
This is the starting point for users. It provides context, answers common questions, and helps users understand how other documents.
- **How to Access Year-End Oracle Account Analysis Report**
This document provides step-by-step instructions on how to access the report referenced in the FAQs.
- **FY26 Year-End Close Deadlines**
This is the authoritative list of required steps and deadlines. Users generally refer to this throughout April-July.
- **FY26 Cubical Checklist**
A printable, one-page quick checklist designed for users to post at their desks as a reminder of key steps and dates.

Finance Reminders

Financial Responsibility Certification

Complete Now!



The Annual Financial Responsibility Certification is part of our continuing endeavor to strengthen the University's internal controls and help ensure financial integrity. Through this process, users are expected to reauthorize their Oracle Finance access. Please follow the link below, which will allow you to review and confirm your access.

[Financial Responsibility Certification](#)
Deadline | May 29

Should you have any questions about the Financial Responsibility Certification, please contact [Crystal Givens](#), University Controller.



Finance Reminders

Contacting Accounts Payable for invoice and payment inquiries

- Effective now through August 31st
- Submit a (PTP) ticket
- Allow 2-3 business days for a response
- For URGENT requests, do not submit a ticket – instead email Christie Barfield, Accounts Payable Manager at csransom@memphis.edu



HOME > ORACLE FUSION

Oracle Fusion

Welcome!

Welcome to the Help Desk ticketing section for Oracle Fusion. This section is intended for users to submit questions and concerns to support offices for assistance.

Instructions for submitting a ticket:

Select the option that is most appropriate for your question or concern. Do not submit duplicate tickets for the same request, as this may slow down response time.



Please read:
Data Security Policy

- Access, Roles & General Issues
- HR/Payroll (HCM)
- Accounts Payable/Purchasing/Ordering/Expenses (PTP)
- Grants and Projects (PGM)
- Content Requests (OGL)
- Financial Planning (EPM)
- General Ledger/Accounting (RTR)



QUESTIONS?

A Note About Timecards



Amanda Clarkson, Human Resources



Timecards for Non-exempt Employees

- Non-exempt employees (those paid on the biweekly payroll) **must** submit a timecard in order to be paid
- For employees with multiple assignments, hours must be entered on the correct assignment
- Hours should NOT be entered beyond the projected end date of the assignment; hours on terminated assignments will NOT process in payroll
- All temporary and student type assignments have a projected end date; this tells the system the assignment will end on that date, but not till that date



Timecards for Non-Exempt Employees

- Check the projected end date for an assignment on the Employment Info page in Oracle

The screenshot shows the Oracle Employment Info page for a person. The page title is "Employment Info" and the job name is "GA Office and Administrative Support Occupations". The page is divided into three columns of information:

Working at Home No	Reporting Establishment	Union Member No
Derived Standard Working Hours 20 Weekly	Assignment Standard Working Hours	Working Hours 15 Weekly
Calculate FTE and headcount automatically Yes	FTE 0.75	Headcount
Annual Working Duration 1950 Hours	Standard Annual Working Duration 1950 Hours	Annual Working Ratio 1
Adjusted FTE 0.75	Start Time 08:30	End Time 16:00
Probation Period	Probation End Date	Notice Period
Worker Category	Assignment Category Masters Graduate Assistant Temporary Employee	Regular or Temporary Temporary
Full Time or Part Time	Hourly Paid or Salaried Hourly	Working as a Manager No
Basis for Seniority Calculation Days	Retirement Age	Retirement Date
People Group	Default Expense Account 10-110001-26000-71100-200-00000-00000-00000	Expense Check Send-to Address
Proposed Person Type	Proposed Start Date	Primary Assignment and Work Relationship Yes
Primary Assignment Yes	Primary Work Relationship Yes	Projected End Date 08/21/2026
Projected Termination Date	Graduate Student Role Classification	Teaching(Y/N) No
GA Work Type Graduate Assistant (other)	IPEDS Primary Function Code	IPEDS Primary Functions



QUESTIONS?

Announcements & Deadlines



Rose Pettijohn, Human Resources



Announcements & Deadlines

- Welcome to all first-time attendees at Focus on Finance & HR!
- Need someone added to the Focus on Finance & HR mailing list? Do not forward meetings to them—send their email to us!
- hr@memphis.edu

Announcements & Deadlines



Across the Board (ATB) Salary Increases

Regular Faculty and Staff Employees:

- 1.5% Increase
- Hired on or before the Spring semester (January 12, 2026)
- Staff and 12-Month Faculty: Effective July 1, 2026, based on the June 30, 2026 salary.
- Academic-Year Faculty: Effective August 1, 2026, based on the Spring semester 2026 salary.

Part-Time Faculty (PTF):

- Effective Fall 2026 semester
- Minimum per credit hour increasing to \$871
- Departments paying higher than the minimum per credit hour, should also increase their PTF by 1.5%.

*(ATB increases do **not** apply to affiliate faculty, GAs, student workers, temporary staff employees, employees on legal contracts/agreements that specify ineligibility, individuals on terminal leave status and departing academic year faculty in salary deferrals).*



Announcements & Deadlines

Leave Roll Reminder:

- Sick leave roll date is June 30th!
- Employees should review their annual leave balances now to determine how much leave would need to be used prior to the June 30th roll date.
- **Exempt Employees** (i.e. executive, administrative, professional, and 12-month academic faculty) may carry forward 315 hours (42 days) to the next fiscal year.
- Any hours above this amount will be rolled over to sick leave.



Announcements & Deadlines

Leave Roll Reminder (Continued):

- **Non-Exempt** staff may carry forward hours according to their years of service in accordance with the following chart:

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

- Any hours above these amounts will be rolled over to sick leave.



Announcements & Deadlines

Help Student Workers Get Paid

- Most student workers are eligible to work 37.5 hours in the summer.
- The direct hire form will give an error if you key 37.5 with nothing in the Comments field. Just explain that this is a summertime only situation in the Comments & it will accept it.



Announcements & Deadlines

Failed Funds Check

- If your PO, Authorization, or Requisition fails funds check, and you see a name from Financial Planning, know that it is an automated message.
- Oracle needs to add a name for these processes, so it will always have one; however, the person named is not notified that your request has failed funds check and, therefore, is not taking any actions in these cases.
- If this happens to you and you cannot figure out why, email budget@memphis.edu with screenshots and Financial Planning will be happy to assist you.



Announcements & Deadlines

Important Vendor Payment Process Update

- Previously the Vendor Payment Direct Deposit/ACH Authorization Form would be accepted to either add or update ACH information for suppliers.
- The policy is being updated and we will no longer accept this form.
- Going forward, a registered supplier can upload a letter/document from their bank, a document on company letterhead, or for individuals a voided check to the Procurement and Contract Services secure portal. This will then be added to the supplier account. A copy of the document will be uploaded to the supplier profile in Oracle Fusion.



Announcements & Deadlines

PAST DUE

- Staff performance appraisals were due April 30, 2026. If you did not complete yours, finish them before June 30th!
- Use the SAMS system at **memphis.edu/performance** to complete and submit these appraisals.
- Next year, performance appraisals will be completed in Oracle.



Announcements & Deadlines

Org Charts/Directory Maintenance Required

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



Announcements & Deadlines

Probationary Period Policy Changes

- Please be reminded that as of January 1, 2026, there is only one probationary period to be served per staff employee during their continuous University employment life cycle.
- Additionally, the probationary period is now three (3) months.
- The written policy itself is currently being revised to reflect these change.
- Because of this policy change, it is very important that supervisors orient and train their new employees and document expectations and any deficiencies.
- Questions? emplrelations@memphis.edu



Announcements & Deadlines

Form I-9 Information

- Visit 178 Administration Building, M-F 9:00am - 3:00pm for I-9 assistance. Appointments are not needed during these hours but can be made during that time frame.
- HR is also offering I-9 online appointments by contacting i9@memphis.edu.
- Other questions? Email i9@memphis.edu



Announcements & Deadlines

Research Participant Payment Update

- Reminder: the University has a new Research Participant Payment form available to use when an employee takes part in a research project as a participant.
- The money earned from this must be treated as wages, and this form will ensure that this happens.
- The form and related information are located at:
https://www.memphis.edu/accounting/research_payment.php.

Announcements & Deadlines



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

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



Announcements & Deadlines

What Happens After I Report the Injury?

- If no medical treatment is recommended:
 - The registered nurse will document the call.
 - An incident report will be entered into the reporting system for you and your supervisor.
- If medical treatment is recommended:
 - The nurse will direct you to the nearest State-approved medical provider.



Announcements & Deadlines

Required Forms and Deadlines

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

Announcements & Deadlines

Employee Injury Reporting



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



Announcements & Deadlines

Separation & Clearance

- In Oracle, employees may start their own online separation action by going to Me > Show More > Resign from Employment.
- The resignation action will route to the line manager and then to HR.
- Resignation letters may be attached to these actions.
- Keep in mind, it is HR's practice to process separation/clearances closer to the date of separation so that leave balances can be accurately calculated for payouts.



Announcements & Deadlines

Timecard Submission Requirements

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



Announcements & Deadlines

Save the date!

- Annual Benefits Enrollment, October 1st-16th, 2026
- Benefits Fair, Memphis, Wednesday, October 7th
- Benefits Fair, Lambuth, Thursday, October 8th





Announcements & Deadlines

Online Training for *Effective Search Committees*:

- This training must be taken by anyone assigned to a hiring committee.
- It is a self-paced training hosted by the Office For Civil Rights Compliance and Title IX.
- Available 24/7 in Oracle Learn, along with lots of other online trainings!
Me > Learning > Learning Catalog > Enroll

Announcements & Deadlines



Online Training for *Recruitment*:

- This training should be taken by anyone who initiates a posting to hire for their team and Line Manager.
- It will help you understand the process and procedure of creating a position posting and hiring a new team member.
- Both *Creating a Requisition and Managing Applicants* and *Creating an Offer Letter* are available as a self-paced online class.
- Available 24/7 in Oracle Learn, along with lots of other online trainings!
Me > Learning > Learning Catalog > Enroll

Announcements & Deadlines



Professional Development Opportunities

- LinkedIn Learning is available for free to all employees!
- Create your own goals and learning paths or assign them to your team.
- Over 40,000 technical and soft skills development opportunities are available!
- You can connect your personal LinkedIn account to your trainings taken at UofM to share what you have learned.
- Go to MyMemphis portal >Employee Tab >Training Opportunities.
- LinkedIn Learning is a great resource to use especially on days where the University is under a modified work schedule due to inclement weather or any other reason.

Announcements & Deadlines



Employee Recognition is Easy With an Updated Tiger Spotlight Award!

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



A Job Well Done



Successful Outcome for Every Student



Thank You



Ascending

Announcements & Deadlines



Employment Opportunities

- Review the University's current job openings at workforum2.memphis.edu.
- Current employees can view internal postings in the Opportunity Marketplace tile in Oracle.
- Follow the Division of Business & Finance on X at [@uofmemphisbf](https://twitter.com/uofmemphisbf)!
- Follow Human Resources on Instagram! [@uofmhr](https://www.instagram.com/uofmhr)



See you in September!

Recordings & presentations available at [memphis.edu/focus](https://www.memphis.edu/focus)