



# FOCUS ON FINANCE & HR

September 16, 2025



# Purpose of Meeting Reminder

- Please share this presentation's information with your departments! Include in your department/college staff meetings.
- **SPREAD THE WORD!**  
If this information goes no further than you, then these meetings will not achieve their stated purpose.
- Materials are posted each month at **[memphis.edu/focus](http://memphis.edu/focus)** to assist with your sharing of information.





# AGENDA

- Mobile Credentials
- Annual Benefits Open Enrollment
- SOAR Project Updates
- Vehicle Accident Reporting
- Announcements & Deadlines



# Mobile Credentials



**Cody Fletcher**  
Project Manager Strategic Operations, Office of CFO

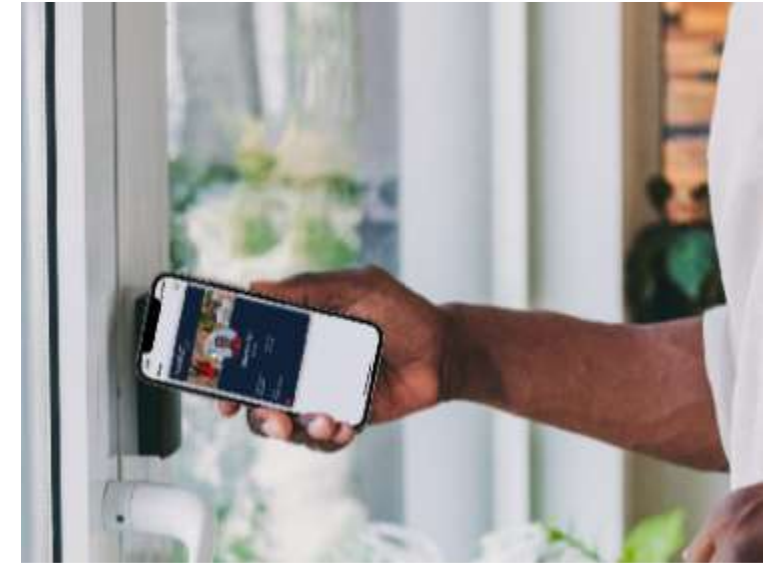
# Mobile Credentials

- The University has implemented Transact mobile credentials (UofM Mobile ID).
- A mobile credential is a digital access key stored securely in a user's digital wallet on their smartphone or smartwatch.
- Allows users to tap their phone/watch to unlock doors, pay for items at dining/vending locations, enter the Rec Center, check out library materials, etc.
- Benefits include cost savings through reduced physical card production, enhanced security like remote revocation, improved convenience for students and staff, and better sustainability by minimizing plastic waste.
- The UofM Mobile ID will serve as the default and preferred campus ID moving forward.
- Currently updating Campus Card policy to reflect introduction of UofM Mobile ID and other rules.



# Mobile Credentials

- Physical ID cards will no longer be issued routinely, but are available for cases of exemption from the UofM Mobile ID.
- New physical ID card fee has been implemented. Current fee is \$20.
- Users may pay the fee on their own to obtain a physical ID card or departments may pay the fee at their discretion.
- Old ID cards no longer work for door access and will be officially retired in the next year.
- Questions/technical support can be sent to [campuscard@memphis.edu](mailto:campuscard@memphis.edu) or by visiting the Campus Card office in person at 115 Wilder Tower.





# Mobile Credentials



QUESTIONS?

# Annual Benefits Open Enrollment



**Amanda Clarkson**

**Director, Employee Benefits, Employee Relations, & Data Management**





# Benefits Open Enrollment Period

- Open Enrollment October 3-17 for active employees (October 3-31 for retirees).
- HR Open Enrollment info website [online now](#).
- Benefits Fairs:
  - Central Campus: October 8th from 10-2 at the UC Ballroom
  - Lambuth Campus: October 9th 11-2 at the VJ Wisdom Parlor
- Flu shots will be offered at the Main Campus Benefits Fair (UC - Iris Room) via The Shot Nurse 11:30am-1:30pm.
- Six informational sessions via Teams ([see website](#)).



# Benefits Enrollment Overview

- Health insurance premiums will increase for active employees. Premium increases will vary depending on the health plan, network and tier you choose.
- For the BlueCross Network P and Cigna Open Access Plus networks, the surcharge will increase.
- Medical flexible spending account and limited purpose FSA contribution and carryover amounts are changing for 2026.
- Vision vendor and premiums will remain the same.
- Cigna Pre-paid premium will remain the same.
- Basic term life/basic AD&D coverage will stay the same.



# Here's What's New!

- **Smile!** The Delta Dental Preferred Provider carrier will change to MetLife.
- **Important!** Carrum Health is a benefit provided by Partners for Health. You now have access to expert care at little to no cost to you! More information can be found at <https://info.carrumhealth.com/partnersforhealth/>.
- **Important!** The Optum provider for HSA and FSA will change to TASC vendor for 2026. All members will receive new debit cards in December. The TASC website is <http://www.stateoftntasc.com/>.





# Changes you need to know

- **NEW!** Starting January 1, 2026, employees will pay 25% coinsurance for medications prescribed for weight loss and 30% coinsurance for in-network specialty medications.
- A separate maximum out-of-pocket amount will be added for Specialty Medications obtained through pharmacy benefits. The amount will vary based on employee tier and plan selected.
- HSA, FSA, and Limited FSA annual limits will be increasing.
- EyeMed vision insurance expanded plan now includes frames once every calendar year.



# Dental Changes Overview

- MetLife DPPO in-network deductibles will change.
- Dental DPPO plan rates will stay the same for employee only and employee + spouse.
- Rates will increase by 25% per month for the employee +child(ren) and 20% per month for the employee + spouse + child(ren) tiers.
- The 2026 DPPO changes will eliminate waiting periods for all enrolled members.
- The Orthodontia plan benefit lifetime maximum will increase to \$1,500.
- Two routine office exams and two problem focused exams will be covered each calendar year.



# What Do I Need to Do?

- Visit [memphis.edu/edison](https://memphis.edu/edison).
- Review current benefits using the [2026 Eligibility and Enrollment Guide](#).
- View the YouTube videos to learn more about your benefits at [partnersforhealthtn.gov](https://partnersforhealthtn.gov).
- Visit the [HR Open Enrollment website](#) for information and [plan-by-plan instructions](#).
- If you do nothing, 2025 benefits will carry over to 2026 with changes as noted.



# Benefits Open Enrollment



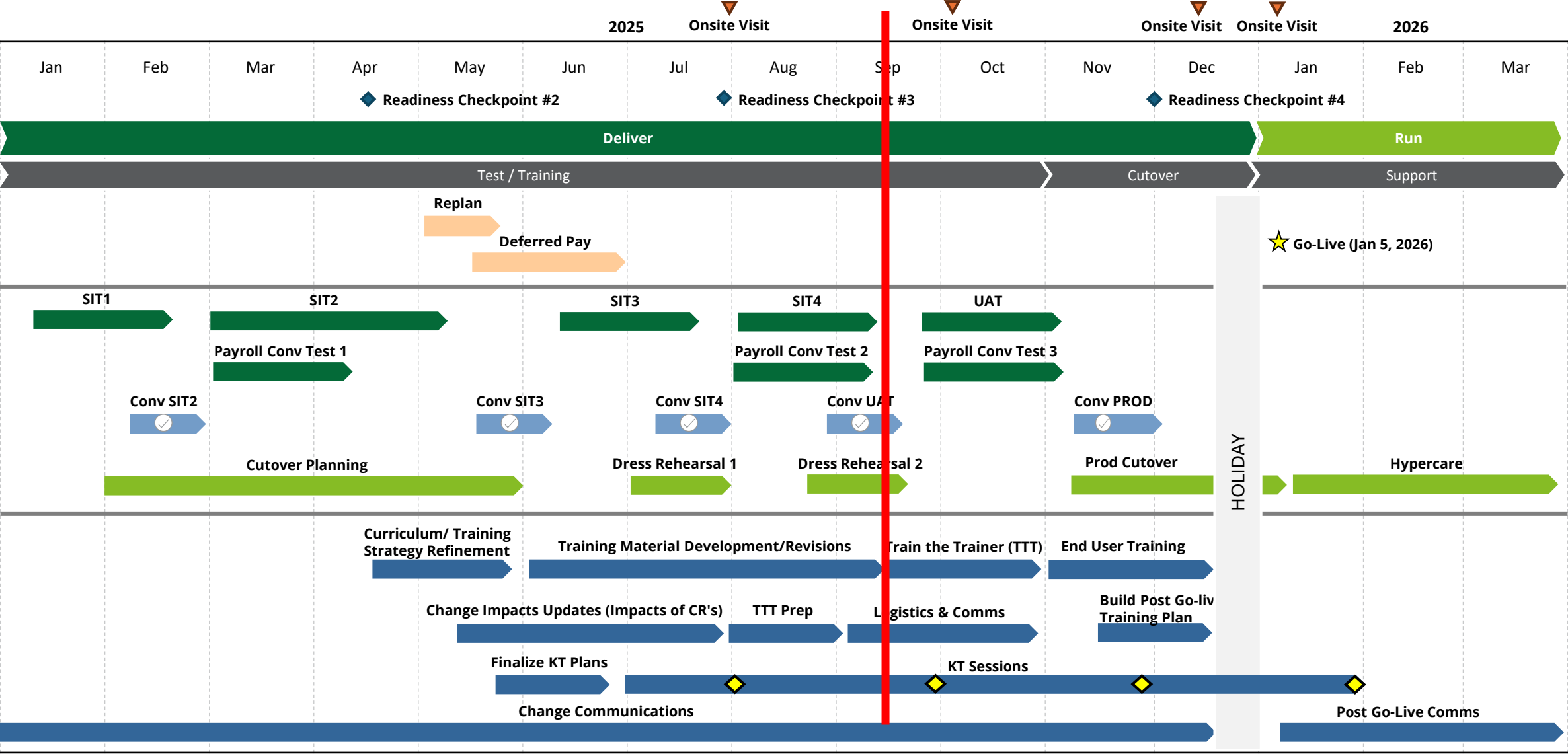
QUESTIONS?

# SOAR Project Updates



**Shundra White Helton**  
ITS, SOAR: Organizational Change Management Lead

# Revised SOAR Schedule







# **SOAR ANNOUNCEMENTS**



# Payroll Change Effective October 1st – Pay Cards

Beginning October 1, 2025, payroll checks will be distributed via pay card or direct deposit. **Traditional paper checks will no longer be issued.**

Employees who do not have direct deposit will automatically be issued a digital pay card for the first payroll (BW21 or MN10), and a physical card will be mailed to them by the bank afterwards. Digital pay cards will be issued through an app (Dash Paycard) downloaded on the employee's phone or personal device.



# Payroll Change Effective October 1st – Pay Dates

To comply with State of Tennessee regulations, starting in October 2025 biweekly and monthly payroll earnings will be available on the exact pay date as indicated on the [payroll schedules](#). This is a change from the current timing, where payroll payments can appear earlier than the actual scheduled pay date.

For exempt (monthly paid) employees, payments will appear in their accounts on the last working day of the month. For non-exempt (biweekly paid) employees, payments will appear in their accounts every other Friday. The only exception to these schedules is when there is a holiday, in which case the payments will be available before the holiday.





# Cutover Announcement: eContract Submissions

eContract submissions in Banner will end on

**Wednesday, November 19th**

to allow for final approvals to be achieved, for Shared Services to enter the EPAFs for Banner, and to accommodate the Thanksgiving holiday break

# SOAR Survey

## Overview

The SOAR Survey analyzes, at a point in time, stakeholder awareness, understanding, and willingness to adopt new processes and technologies.

- Progress is tracked against prior assessments and allows the Organizational Change Management (OCM) team to identify areas that need attention, prioritize and address concerns, and report results to project leadership.
- Used to identify broad trends by varying corners of UofM. It does not collect or address concerns of individuals.

**\*Coming late October 2025**



## SOAR Survey 3: Spring 2025

- Significant to moderate increases across **awareness dimension** and **engagement effectiveness across all groups since last survey.**
- **Average Score:** Ranging from **3.3 – 3.6**, *for non-SOAR team members.*
- **Participation:** ~20% of campus community



## Upcoming: SOAR Survey 4 October 2025

- ★ **SOAR Survey 4 will be available soon!**
- ★ Let your voice be heard and help us better connect with the campus community as we get closer to Go-Live.
- ★ Help us increase our participation - *we want to hear from you!*

# Campus Engagement



## SOAR Website

- Regular updates including FAQs, announcement, and resources
- [www.soar.memphis.edu](http://www.soar.memphis.edu)  
*Launched March 2024*



## Newsletter & Announcements

- Communications to keep the UofM community informed  
*Launched March 2024*



## Community Wide Events

- Town Halls
- Roadshows
- Roundtables  
*Launched May 2024*



## Readiness Surveys

- Questionnaires that provide insight around levels of stakeholder awareness, support, and readiness  
*Launched June 2024*



## Change Champion Network

- Community members who disseminate program information to stakeholders  
*Launched Fall 2024*



## Foundational Readiness Sessions

- Sessions that provide users with early learning on a specific business process  
*Launched Summer 2024*



## User Acceptance Testing (UAT)

- Designed to test the system and gather user feedback  
*Launch Fall 2025*



## End User Training

- Courses that provide users with the knowledge and skills to be successful in the system  
*Launch October 2025*

# Campus Engagement – August & September



## **August – September**

- Change Champion (August 21, September 18)
- Newsletter distributed via email on 8/22/25
- Pay Cards & Pay Dates email communication distributed 8/19/25
- CAS Departmental Meeting (9/3/25)
- Deans Council Meetings (9/3/25, 9/9/25)
- Faculty Senate EC, Full Committee (9/23/25, 9/30/25)
- FOFHR (9/16/25)
- Train the Trainer Sessions begin (9/17/25)
- SOAR Newsletter (9/24/25)

## **September Town Hall – September 25, 2025 @ 2:30pm ([Registration available](#))**

A recording of this Town Hall will be available on the [SOAR Mediasite](#) channel.

*Interested in understanding more about SOAR? Invite the SOAR team to a departmental/team meeting.  
[Visit our Request a Meeting link.](#)*



# Reporting Vehicle Accidents



Danny Linton, Human Resources

# Reporting Vehicle Accidents



# Reporting Vehicle Accidents



QUESTIONS?

# Announcements & Deadlines



**Danny Linton, 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? Don't forward to them—forward to us!
- [hr@memphis.edu](mailto:hr@memphis.edu)



# Announcements & Deadlines

## Introducing our newest employees:

- **Accounting:**
  - Crystal Givens, University Controller
  - Latrena Jones, Assistant Controller
  - Sandra Fung, Assistant Manager, General Accounting
  - Monica Cartwright, Accounts Payable Specialist
- **Human Resources:**
  - JC Griggs, Senior HR Business Partner
  - Arnetta Lee, Employee Benefits Specialist
  - Sylvia Roberts, Data Management Associate



# Announcements & Deadlines

## October Budget Key Dates

- Revenue Projections: Due Friday, September 26, 2025
  - Financial Planning Office will be available for individual meetings the weeks of September 15th and 22nd [budget@memphis.edu](mailto:budget@memphis.edu)
- Expenditure Projections: Due Friday, September 26, 2025
  - Departments can process Online Budget Documents until Friday, October 3, 2025
- Position Budget Revisions: Due Monday, September 24, 2025
  - Current & Base Budget Revisions to be included in Fall Budget
- Capital/R&R/Facility Projects: Due Friday, September 26, 2025



# Announcements & Deadlines

## Expenditure Online Budget Revisions:

- Please remember that any online budget revisions must be entered and moved through the approval queues by the end of day, on Friday, October 3, 2025, to be included in the October budget submission.





# Announcements & Deadlines

## Divisional Carryforward balances:

- The FY25 carry forward funds will soon be posted into Banner Finance to account code 74000 - operating. It is important to remember to shift carryforward funds, as well as any unallocated funds to the budget pools/account codes where the funds will be spent – be sure and incorporate spring semester spending as well.
- The “best practice” is to look at historical spending as compared to both your base and current year budgets (which includes carryforward funds) and submit budget revisions to properly align your budget. Base alignment will greatly reduce the number of budget revisions that will be required in the future.



# Announcements & Deadlines

## Fall Budget – Benefit Fringe Rate:

- Benefits FY26 Fringe Rate
- 36.82% Salaried Employees
- 42.17% Hourly Employees
- 6.93% Temp Employees – With and Without Insurance
- 0.97% Student / GA Biweekly
- 4.96% Student / GA Monthly



# Announcements & Deadlines

## **New bereavement policy changes:**

- Three (3) days paid leave for an employee's siblings, grandparents, grandchildren, foster parents, parents-in-law and any other member of the family who resides within the home.
- Five (5) days paid leave for an employee's parents or stepparents.
- Ten (10) days paid leave for an employee's spouse, children, stepchildren and foster children.

The days off provided under this policy do not have to be consecutive but must be taken within sixty (60) working days of the death.

Employees may be required to provide proof of death to support their bereavement leave request which may include death certificate, obituary, funeral program or statement from the funeral home.



# Announcements & Deadlines

## Updates on Exchange Visitor Program and Employment-Based Immigration-Related (Visa) Requirements

- The University's Office of Legal Counsel provided additional guidelines for international programs and federal immigration requirements.

## Transition of J Exchange Visitor Program

- Effective September 15, 2025, responsibility for the University's J Exchange Visitor Program will move from the Office of Legal Counsel to the Division of International Affairs, which already manages the F-1 and J-1 student programs. Departments and visitors will now work directly with the Study Abroad Office ([tigersabroad@memphis.edu](mailto:tigersabroad@memphis.edu)). Current J exchange visitors and their departmental sponsors have been sent a direct communication regarding this transition.





# Announcements & Deadlines

## Reminder: H-1B Petitions for January Hires

- To ensure timely processing, any H-1B sponsorship requests for January hires must be submitted to Legal no later than October 1st. Last-minute requests have strained resources in prior cycles, and Legal is unable to file for hires in a timely fashion when deadlines are missed. Please work with your departments to plan ahead.
- Please share these updates with your department administrators as appropriate. The Office of Legal Counsel (OLC) will remain available to support you as these changes continue to unfold.
- Link to OLC website: <https://www.memphis.edu/legal>



# Announcements & Deadlines

## JUST A REMINDER FROM EARLIER!

- The last day to enter e-contracts in the old system is November 19, 2025.
- The last day to approve e-contracts in the old system is November 26, 2025.
- Part-Time Faculty contracts for the Spring 2026 semester will be shifting from the biweekly to the monthly payroll. We are currently exploring the best way to handle entering these contracts and will communicate further decisions.
- There will be a moratorium period on e-contracts between November 27, 2025 and January 5, 2026, while the University transitions from Banner to Oracle.



# Announcements & Deadlines

## GE2016 - Notification of External Audits and Review

- The University is subject to external audits, program reviews, and similar activities by various agencies and other organizations, such as fiscal monitoring, desk audits, etc. It is the responsibility of the primary contact person for the program or activity being reviewed to notify Internal Audit and other offices as appropriate. Other offices would in most cases include the Tennessee Comptroller of the Treasury, Office of Grants and Contracts Accounting, and the Office of Legal Counsel depending on the circumstances.
- After the external audit or review is complete, the primary contact will usually receive notice of the results in writing. The primary contact (or designee) should forward a copy of the results to Internal Audit and also to the Office of Grants and Contracts Accounting if the external audit or review involves funding for a sponsored project. Internal Audit under this policy include reporting occurrences of external reviews and audits to the Audit Committee, Tennessee Comptroller of the Treasury Division of State Audit, and others as the circumstances may dictate.
- Email address: [uom\\_audit@memphis.edu](mailto:uom_audit@memphis.edu)
- Website: <https://www.memphis.edu/audit/external.php>



# Announcements & Deadlines

- Please be reminded that any employee not working onsite during normal business hours must have an approved Alternative Work Arrangement (AWA) form on file with Human Resources.
- Form located [here](#).



# Announcements & Deadlines

- Research Payment New web page
- [https://memphis.edu/accounting/research\\_payment.php](https://memphis.edu/accounting/research_payment.php)





# Announcements & Deadlines

- As we move closer to Oracle go-live, we have limited additions & changes to the Chart of Accounts to allow for a smooth transition to the new system.
- We are not creating new E&G Funds, Account Codes or Program Codes in Banner.
  - Grants and Foundation Funds will still be created as needed
  - Activity Codes can still be created
  - Indexes can still be created
- New PI Orgs can no longer be requested for new faculty effective October 1, 2025



# Announcements & Deadlines

- Check your org charts!
- <https://www.memphis.edu/hr/orgcharts.php>
- It is imperative that reporting structures are accurate as we phase into Oracle.
- Need to make changes? Use the Request to Change Position Supervisor action in WorkforUM.
- Remember, we track positions to positions, not people to people.

# Announcements & Deadlines

## Social Security Administration Update

- Employees must make an appointment to get a new Social Security card, replacement, or name change.

Scan the QR code to get started. You may be able to start or complete your request online.

- 1 Open the camera app on a smart phone or tablet.
- 2 Point the camera at the QR code.
- 3 Tap the browser that appears.

A square QR code with a black and white pixelated pattern, used for scanning to access online services.



# Announcements & Deadlines

- LinkedIn Learning is available for free to all employees!
- Create your own goals and learning paths or assign them to your team.
- Over 15,000 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've learned.
- Available in the [MyMemphis](#) portal.
- Keep in mind that 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

## 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 Human Resources as soon as possible to start 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 should I do if I am injured on the job?

- If no medical treatment is recommended, the registered nurse will document the call for you and your supervisor and enter an incident report in the reporting system.
- If medical treatment is recommended, the nurse will direct you to the nearest State approved medical provider.
- **You and your supervisor will need to complete the First Report of Injury or Illness form. This form should be submitted to the Environmental Health and Safety Office. Please complete within 24 hours of the injury. If the accident is not reported within 48 hours, the employee's department will be assessed a fine by the State Comptroller's Office.**



# Announcements & Deadlines

## Separation & Clearance

- Please remember to immediately complete an online separation notice for any employee in your area that is departing the University prior to their departure date!
- 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 separation/clearances closer to the date of separation so that leave balances can be accurately calculated for payouts.
- <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.
- **December 2025 leave reports will be due early (December 21<sup>st</sup>) due to shift to Oracle.**
- **All outstanding leave reports for all months must be completed in order to transition away from Banner.**



# Announcements & Deadlines

## Next Online Training for *Effective Search Committees*:

- October 9, 2025, 10am
- Sign up in [Learning Curve](#)!



# Announcements & Deadlines

## 8<sup>th</sup> Annual Excellence Awards

- November 11, 2025, at 10am
- University Center Ballroom





# Announcements & Deadlines

## 2025 Career Milestone Awards

- Did you celebrate a Career Milestone in 2023 or 2024? Don't forget to select your gift!
- [memphis.awardco.com](https://memphis.awardco.com) (login with Single Sign On)
- Select from University of Memphis merchandise or shop Amazon through the Awardco platform!
- 2025 Career Milestone Recipients will be celebrated on March 6th, 2026. Save the date!



# 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.
- HR is also offering I-9 online appointments by contacting [i9@memphis.edu](mailto:i9@memphis.edu).
- Other questions? [i9@memphis.edu](mailto:i9@memphis.edu)



# Announcements & Deadlines

- Remember to review the University's current job openings at [workforum.memphis.edu](http://workforum.memphis.edu).
- Follow the Division of Business & Finance on X (formerly Twitter) at [@uofmemphisbf](https://twitter.com/uofmemphisbf)!
- Subscribe to our WorkforUM X (formerly Twitter) feed at [@umemphisjobs](https://twitter.com/umemphisjobs)!
- Follow us on Instagram! [@uofmhr](https://www.instagram.com/uofmhr)



# See you next month!

**Next Meeting: October 21, 2025 at *memphis.edu/fofhr***  
**Recordings & presentations available at *memphis.edu/focus***