



# **FOCUS ON FINANCE & HR**

**November 15, 2022**

# Agenda

- Effort Certification Changes
- ITS Security Notes
- Travel Card
- New Ways to Get Your HR Information
- Announcements & Deadlines



# **EFFORT CERTIFICATION CHANGES**

**Heidi Kendall**

# Effort Certification Changes

The Process Improvement Executive Leadership Board requested that Process Improvement Teams determine how to better reflect Unrestricted Faculty Research in the University's Financial Statements. These teams were formed in the Spring/Summer of 2022.

- One team was tasked with setting up a process to charge Faculty salaries to Unrestricted Research based on employment contracts and Department expectations.
- The other team was tasked with determining the best approach for certifying research hours for the University as a whole.

# Effort Certification Changes

It was decided to utilize the Banner 9 Effort Certification module to document the Certification of Effort for the University. As a part of the change to the new Effort Certification software, the following changes will also occur:

- The University of Memphis will require faculty to certify effort related to unrestricted faculty university research in addition to any Federal requirement for Sponsored Programs.
- Starting in January 2023, Effort will be certified using the Banner Effort Certification module, starting with certification period from July through December 2022.
- Starting in February 2023, the Effort period will change to Monthly. The January 2023 Effort Period will be certified in February 2023.
- Starting with the Spring 2023 Effort Periods, if required Effort Certification is not performed in a timely manner – 45 days after the end of the monthly Effort Period, a new process will be in place to move any Non-Certified Effort back to the Department.

# Effort Certification Changes

The Effort Certification team is working on updating the University Policy BF4010 to incorporate these changes.

Training on the Banner 9 Effort Reporting module and details of the new university effort certification policy will be held after we return from the winter break. Specific dates and times will be communicated in the coming weeks.

- All faculty and monthly employees whose salary (or portion of salary) is charged to a grant or Faculty Research should attend training.
- All PI's and Academic Financial Managers should attend training.

# Effort Certification Changes

As with any Banner module, we are limited in some aspects as to what the system can do.

- Banner Effort Certification shows percentages, not dollar amounts, and we can't add dollar amounts.
- Banner Effort Certification shows only the Grant, Fund, and Org codes. It does not show Program, Account or Activity codes.
- Banner Effort Certification has an 'Add New Funding' button that can be selected on the Effort Certification that may allow you to make changes – but that doesn't really do anything towards certifying effort.
  - No one is notified, no process is initiated, and now your Certify button is unusable. We can not disable this button.
- Banner Effort Certification has a 'Request Changes' button. This is to be used to email someone to let them know that a Labor Redistribution needs to be done.
- **Any Effort Certification that needs to be changed can only be changed by having a Labor Redistribution completed before Banner will allow a Certification with the new percentages.**
- **Once an Effort Certification has been completed, the Effort Certification is considered Locked, and no Labor Redistributions can be started until the Effort Certification is Unlocked.**

# Effort Certification Changes

My Profile

Annual Leave in hours 322.50 Sick Leave in hours 525.50

Full Leave Balance Information

Pay Information	▼	
Latest Pay Stub: 10/31/2022	All Pay Stubs	Direct Deposit Information
Earnings	▲	
Benefits	▲	
Taxes	▲	
Job Summary	▲	
Employee Summary	▲	

My Activities

Enter Leave Report

Approve Time

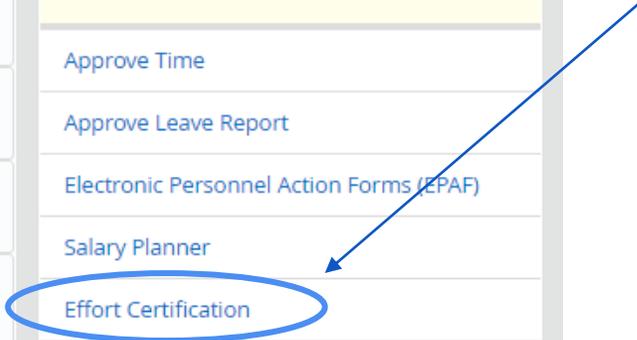
Approve Leave Report

Electronic Personnel Action Forms (EPAF)

Salary Planner

Effort Certification

Labor Redistribution



# Effort Certification Changes

Once you click on the Effort Certification Tab, this will be your view:

- All Certification periods that you have/will Certify will be listed. The Period Code will be a Sequential Number with the latest Report Period being the lowest number, so the latest Report Period will be on top
- Double Click on any part of the row to be certified in order to open the Certification.

Certify My Effort Proxy Super User

[Print](#) [Open](#)

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[Certify My Effort](#) [Review Or Certify Reports](#)

Certify My Effort

COA	Period Code	Report Period	Start Date	End Date	Status	Unlocked/ Locked	Comments
U	1	January 2022	02/01/2022	10/31/2022	Completed	Locked	
U	2	February 2022	02/28/2022	03/31/2022	Awaiting Certification	Unlocked	

# Effort Certification Changes

This is the view that the Certifier will see. It only shows percentages – no dollar amounts. If the percentage appears reasonable, the Certifier can click the Certify button.

The screenshot displays the 'Effort Report Overview' interface. At the top, there are navigation tabs: 'Effort Report' (selected), 'Pay Period Summary', 'Comments', and 'Routing Queue'. Below the tabs is a 'Sponsored' section containing a table with the following data:

Fund	Organization	Effort Category	Charge Type	Effort
114501 Chairs of Excellence Cost Share	214000 Psychology	EFFORT Sponsor Funded Effort	COST SHARE	90.00
200895 Chair Psychology	214000 Psychology	EFFORT Sponsor Funded Effort	DIRECT	10.00

Below the table, it states 'Total Sponsored Activity 100.00%' and 'Total : 100.00%'. At the bottom, there are four buttons: 'Request Changes', 'Certify' (circled in blue), 'Add New Funding', and 'Save'. On the right side, there is a sidebar with sections: 'Report Status' (showing '2 February 2022 February 28,2022 - March 31,2022 Awaiting Certification - Unlocked'), 'Important Dates' (listing 'Begin Pre-Review February 28,2022 Certification Period February 28,2022 to March 31,2022 Post Review End March 31,2022'), and 'Pay Dates' (listing 'MN - 2 February 01,2022-February 28,2022').

# Effort Certification Changes

When the Certify button is clicked, a popup appears with the Certification statement. To complete the Certification, the 'I Agree' button must be selected.

The screenshot displays an 'Employee Dashboard' with a breadcrumb trail 'Employee Dashboard • Effort Ce'. A 'Sponsored' section lists two funds: '114501 Chairs of Excellence Cost Sh' and '200895 Chair Psychology'. A modal window titled 'Certify' is open, containing the following text: 'I certify that I have performed the work and that the salary distribution for the period covered is reasonable in relation to the work performed. If someone is certifying for me, they certify that they have first hand knowledge of (or have used suitable means of verifying) work performed by me and that the salary distribution for the period covered is reasonable in relation to the work performed.' At the bottom of the modal are 'Cancel' and 'I Agree' buttons. In the background, a table shows 'Charge Type' and 'Effort' values: 'COST SHARE' at 90.00 and 'DIRECT' at 10.00. Below the table, it states 'Total Sponsored Activity 100.00%' and 'Total : 100.00%'. At the bottom of the dashboard are buttons for 'Request Changes', 'Certify', 'Add New Funding', and 'Save'.

Charge Type	Effort
COST SHARE	90.00
DIRECT	10.00

Total Sponsored Activity 100.00%

Total : 100.00%

# Effort Certification Changes

The Pay Period Summary lists the Pay Period and the percentages charged.

Effort Report **Pay Period Summary** Comments Routing Queue

**Monthly 2 2022** February 01,2022 - February 28,2022

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
214000 Psychology	CHAIR08 Chairs of Excellence	114501 Chairs of Excellence Cost Share	EFFORT Sponsor Funded Effort	89.8000	89.8000
214000 Psychology	CHAIR08 Chairs of Excellence	200895 Chair Psychology	EFFORT Sponsor Funded Effort	10.2000	10.2000

Effort Report Overview

**Report Status**

2  
February 2022  
February 28,2022 - March 31,2022

Awaiting Certification - Changes Submitted

Changed by Kendall, Heidi

**Important Dates**

Begin Pre-Review  
February 28,2022  
Certification Period  
February 28,2022 to March 31,2022  
Post Review End  
March 31,2022

**Pay Dates**

# Effort Certification Changes

Effort Report Pay Period Summary **Comments** Routing Queue

This is a good place for an Alternative Certifier to document their knowledge of the work performed. |

Remaining character : 3898

Add Comment

## Previous Comments

Kendall, Heidi

Anyone who has access to the employee's Effort Certification can make a comment. However, the Comments are viewable by all who can view, and cannot be erased once the Add Comment box is clicked.

Posted on Nov 09, 2022 04:22:44 PM

Effort Report Overview ^

## Report Status

2

February 2022

February 28,2022 - March 31,2022

Awaiting Certification - Unlocked

Comments Exist

## Important Dates

Begin Pre-Review

February 28,2022

Certification Period

February 28,2022 to March 31,2022

Post Review End

March 31,2022

## Pay Dates

# Effort Certification Changes

QUESTIONS?



# **ITS SECURITY UPDATE**

**Jarrold Taylor**

# Physical Security Tips

- Clean desk = secure desk
- Lock away any documents or devices with sensitive information
- No tailgating in secured/restricted areas
- Don't plug in found USB drives! Turn in any devices to the ITS Service Desk ([umtech@memphis.edu](mailto:umtech@memphis.edu)).

# ITS Security Update

**QUESTIONS?**



# **TRAVEL CARD**

**Grace Ballard**

# New Card

## You have completed your pre-approval in Chrome River, what's next?

- A report is generated to Procurement that has your preapproval request on it.
- A new card is ordered through US Bank
- Your total pre-approval request amount will be loaded onto the new card, including per diem and mileage (can not use travel card for per diem or mileage).
- Card admin will document your Chrome River pre-approval with “new travel card ordered on \_\_\_\_\_ date”
- Card arrives to Procurement Office within 4-7 business days after your pre-approval has been approved in Chrome River

# New Card

- Once the card arrives and is prepared for the cardholder, an email will be sent letting you know the card is ready for pick up
- Agreement to use the travel card must be submitted or signed when getting the new card
- If you are on Lambuth Campus, we can send the card to you when Payroll sends their checks, bi-weekly. This must be requested by the cardholder.
- Once you have the card in your possession, you will need to activate the card

# Activating New Card

- Your new card has a sticker on the front, call or go online to activate your new card
- You will need the phone number you provided in your pre-approval when activating
- If it ask for a PIN or SSN when setting up your card, US Bank is referring to the last 4 digits of your UID number, no SSN were provided to US Bank

**Note: When using US Bank travel card to make transactions, you should not be asked for a PIN.**

# Using New Card

- Once activated, you should be able to begin making transactions immediately
- Be sure to use the address that is on the paperwork received with your new card: **3720 Alumni Ave Memphis, TN 38111**. It is very important you use this address when making transactions. If not, transactions are likely to be declined.

# Existing Travel Card

- If you requested a travel card for a prior trip and used all the funds and expect to travel again in the future, hold on to the card that was issued to you
- You can request more funds be added to the card for each travel event you have planned
- Requests for more funds are completed through the Chrome River pre-approval process
- Once report for additional funds has been received by the Procurement Card Admin, the funds will be added to the card and documented in Chrome River that your funds have been added
- Funds should be available within 24-48 hours of adding to the account

# Reconcile

- Upload transaction receipts into Chrome River, either on computer or by app on phone
- Once all transactions have a receipt, you will need to verify the correct receipt is with the corresponding transaction
- Once you have everything uploaded, you will complete/submit your expense report
- Anything that is owed to the university will be deducted from any reimbursement you may receive
- Anything the University owes you (per diem and mileage) will go ACH to your designated account for direct deposit reimbursements

# Other

- This card can be used multiple times
- Complete a pre-approval for each travel with requested amounts and select “add funds to existing travel card” in the Chrome River pre-approval process
- If you plan on departing from the University and you have a card, please let Procurement know that you are ending employment on \_\_\_\_ date. Please be sure, if you are leaving before the close of a statement, that you have provided your dept/reconciler/approver with the appropriate receipts for reconciling at the end of the month or you have already uploaded all receipts to Chrome River

# Questions?

## For Travel Card questions:

- Email:

[cardsupport@memphis.edu](mailto:cardsupport@memphis.edu) or [purchasing@memphis.edu](mailto:purchasing@memphis.edu)

## For Chrome River questions:

- Email:

[sharedservices@memphis.edu](mailto:sharedservices@memphis.edu)



# **NEW WAYS TO GET YOUR HR INFORMATION**

**Danny Linton**

# Group E-Mails on Staff Directory

- The [HR Staff Directory](#) includes our group e-mail accounts.
- Use these to directly contact the group you need...you will receive faster service.

**HR Service Center**  
Your first point of contact  
Group E-Mail Account: [hrservicecenter@memphis.edu](mailto:hrservicecenter@memphis.edu)



**Charlena Brassell**  
HR Service Center Associate  
678.3573 | [E-Mail](#)



**Kiana Holley**  
HR Service Center Associate  
678.3573 | [E-Mail](#)



**Elantra Owens**  
HR Service Center Associate  
678.3573 | [E-Mail](#)

# HR Services Website

- The [HR Services](#) page links to virtually all informational pages that exist on HR's site.
- Topics are divided by which HR area “owns” that subject. You may either read through the lists or use your browser's Search function to find a keyword.

# HR Glossary

- What's the ACA? The CDHP? Don't know your FMLA from your FOAPAL?
- The new [HR Glossary](#) is a great resource for new employees who need help understanding some terminology that they may not already know. It may even be helpful for some seasoned employees, too!

The screenshot shows the HR Glossary page on the University of Memphis website. The header includes the University of Memphis logo and navigation links for Staff Directory, HR Services, Holidays, HR Glossary (highlighted), Newsletters, Posters, Calendars, Policies, and HR @ Lambuth. The main content area features a breadcrumb trail (Home > Human Resources > HR Glossary) and a title 'HR Glossary'. Below the title, a paragraph states: 'Listed below is a helpful glossary of terms often used at the UofM in relation to Human Resources. This glossary can be helpful to onboarding employees who are new to the University's lingo.' A bulleted list defines the following terms:

- **ACA:** The Affordable Care Act, which provides rules that make some employee groups eligible for medical benefits when they had previously been considered ineligible. More information about the ACA and how it affects employees at the UofM is available [online](#).
- **Banner:** The University's largest computer system, also known as an ERP system. Includes multiple modules used across the UofM, including Banner Finance, Banner HR, Banner Student, Banner Advancement, etc.
- **Banner ID:** Also known as a U Number, U#, or UID, the Banner ID is a specific identifier for one person (employee or student) and/or vendor within the Banner system. An example would be U00001234. The Banner ID is not to be confused with a UUID (see below).
- **CDHP:** Short for Consumer-Driven Health Plan. The CDHP health insurance option offers lower premiums and lower out-of-pocket maximums, but have higher deductibles. CDHPs include the use of a Health Savings Account (HSA) to use for qualified healthcare expenses, including deductibles and retirement savings. The State of Tennessee provides seed money for these HSAs.

The left sidebar contains links for TAKE ACTION, WORKFORUM, FOCUS ON FINANCE & HR, FORMS, CONTACT US, and FOLLOW US ONLINE (with social media icons for Instagram and Twitter).

# B&F Systems Training

- [Learning Curve](#) offers 24/7 online training introducing employees to the various systems maintained and supported by Business & Finance. Look for **B&F Systems Overview Training**.
- This can help new employees understand what Banner, TigerBuy, WorkforUM, and many other systems are and do.

# NEO Post-Orientation Tasks

- Finally, remember that all new employees are expected to complete a list of “to do” tasks in the MyMemphis portal’s Employee tab after they attend orientation.
- Although intended for newbies, oldies can use these links as needed!

## New Employee Post-Orientation Tasks

*The following list of tasks, though intended for new employees, can also be used as needed by existing employees.*

[Review/Update Form W-4](#)

[E-Mail Account Setup](#)

[Campus ID Card](#)

[Complete Assigned Benefits & Beneficiary Tasks in State of TN Edison System](#)

[Review Parking Information](#)

[Review Payroll Information](#)

[Complete Online Confidentiality Acknowledgement](#)

[Complete Title VI Training](#)

[Complete Discrimination & Harassment Prevention Training](#)

[Complete FERPA Tutorial](#)

[Complete IT Security Awareness Training](#)

[Workplace Safety Training \(if not already completed\)](#)

[Complete Student/Customer Service Training \(Staff & Temporary Employees only\)](#)

Using your memphis.edu account, complete:

[Direct Deposit New Employee Payroll & Employee Reimbursement Authorization](#)

# **New Ways to Get Your HR Info**

**QUESTIONS?**



# **ANNOUNCEMENTS & DEADLINES**

**Danny Linton**

# 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

- Remember to review the University's current job openings at [workforum.memphis.edu](http://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

- Welcome back Terrice Watson to the UofM!
- Terrice is now the AVP for Research Administration & Compliance in Business & Finance.

# Announcements & Deadlines

- The UofM will be implementing the following mid-year compensation adjustments:
  - .5% one-time salary supplement which will be paid this month, November 2022
  - .5% across-the-board base salary increase, which will be effective January 2023
- This one-time payment and the across-the-board compensation adjustments apply to 12-month faculty and staff hired on or before July 1, 2022, and to all 9-month and 10-month faculty hired on or before September 1, 2022.
- Employees must be actively employed on the date of payment to be eligible.

# Announcements & Deadlines

- Effective November 2022, the leave reports for all academic department chairs will roll up to the Dean's level of their College for approval.
- For areas where there is no Chair-to-Dean rollup, the leave report will roll up to the Provost.
- A further reminder that no employee should EVER approve his/her own timesheet or leave report!

# Announcements & Deadlines

- Employee Self Service will be getting a facelift in 2023 as the UofM rolls out the Employee Dashboard link on the MyMemphis Employee tab.
- This will allow employees to better access employee, time, and position information.
- Time sheets/leave reports will look different in this new version, though they essentially function the same. Watch for updated help guides coming soon.

# Announcements & Deadlines

## Separation & Clearance

- Please remember to immediately complete online separation notices for any employee you have that are departing the University!
- Not doing so places the University at risk because the employee would still have access and can 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.
- <https://umwa.memphis.edu/sep-clear>

# Announcements & Deadlines

- Reminder that new, different, and sometimes higher premiums for January 2023 benefits will be deducted from employee paychecks in December 2022.
- Expect your check to look a little different this December!

# Announcements & Deadlines

- Faculty performance appraisals for 2022 will kick off in WorkforUM on January 4, 2023. Faculty appraisals for 2021 will close (forever) on December 16, 2022.
- Staff performance appraisals in SAMS are due April 30, 2023 for all non-probationary staff employees. Trainings related to this topic will return in the new year.

# Announcements & Deadlines

Next WorkforUM training:

- January 25, 1:30pm
- Sign up in [Learning Curve!](#)

# Announcements & Deadlines

Next Effective Search Committee training:

- December 8, 10am
- Sign up in [Learning Curve!](#)

# Announcements & Deadlines

## Coming in 2023:

- HR is spearheading a new initiative for the new year called “Empowering Management.”
- This series of trainings will function as a “toolkit” for managers & supervisors about a wide variety of issues such as performance appraisals, hiring, University policies, FMLA...basically everything any good manager should know!
- Be on the lookout for more information in 2023!

# Announcements & Deadlines

## **In support of R1:**

- Certification in global hiring (US Immigration Employment Credential)
- HR new research recruiting position

# Announcements & Deadlines

- Human Resources will again be providing Total Compensation Statements in January delineating the value of all compensation and benefits each regular employee of the University received in 2022.
- This is not to be confused with your W-2 tax form!
- Watch your e-mail for a notice to check for your statement in the MyMemphis portal.

# Announcements & Deadlines

- DocuSign is no longer to be used!
- Use Softdocs for templated form needs or Adobe Sign for individual one-offs.
- Contact ITS for more info on Softdocs as needed.

# Announcements & Deadlines

- Save the Date!  
HR's Holiday Open House  
December 7, 9:30-11:30am  
Administration Building  
Lobby
- Judging for the campus-wide  
Gingerbread House contest  
as well as HR's Door  
Decoration contest will take  
place as part of the  
festivities!

## Gingerbread House CONTEST 2022



**Information**  
Optional innovative ideas webinar  
at [memphis.edu/hr/via.php](https://memphis.edu/hr/via.php)

**Dec. 7 | 9:30-11 AM**  
Required contest registration at  
[tinyurl.com/UofMGingerbreadRegistration](https://tinyurl.com/UofMGingerbreadRegistration)

**Additional Details**  
Access registration, contest  
guidelines, categories and prize info



# Announcements & Deadlines

## Form I-9 Information:

- Appointments no longer needed during regular business hours.
- Visit 143 Administration Building, M-F 8-4:30.
- Questions? [i9@memphis.edu](mailto:i9@memphis.edu)

# Announcements & Deadlines

## Temporary, Student, & GA Spring E-Contracts:

- Remember to renew any needed temps or student workers while they still have access to their memphis.edu e-mail accounts!
- If you submit these e-contracts by December 9, there should be no lapse in system access for these employees.
- Questions? [hrbp@memphis.edu](mailto:hrbp@memphis.edu)
- Graduate assistant e-contracts for Spring 2023 are due to the Graduate School by Dec. 9.

# Announcements & Deadlines

## **Upcoming Holiday Closures:**

- November 24-25: Thanksgiving Day & One Administrative Closing Day
- December 23-30: Christmas Day & Five Administrative Closing Days
- January 2, 2023: New Year's Day (Observed)
- January 16, 2023: Martin Luther King, Jr. Day

Watch for e-mail notices about early payroll deadlines related to these holiday closures.

# Announcements & Deadlines

## VALUES IN ACTION

WORKSHOP 2022



Support the toy drive for Porter-Leath by donating new, unwrapped toys through Dec.9

Toys appropriate for ages 6 weeks to 5 years old

Monday through Friday from 8-4:30 in the HR Service Center, 165 Admin



**THANK YOU FOR ATTENDING!**

**Next Meeting**

January 17, 2023 @ 2:30pm

**Meetings:** [memphis.edu/focuszoom](https://memphis.edu/focuszoom)

**Website:** [memphis.edu/focus](https://memphis.edu/focus)