FOCUS ON FINANCE & HR

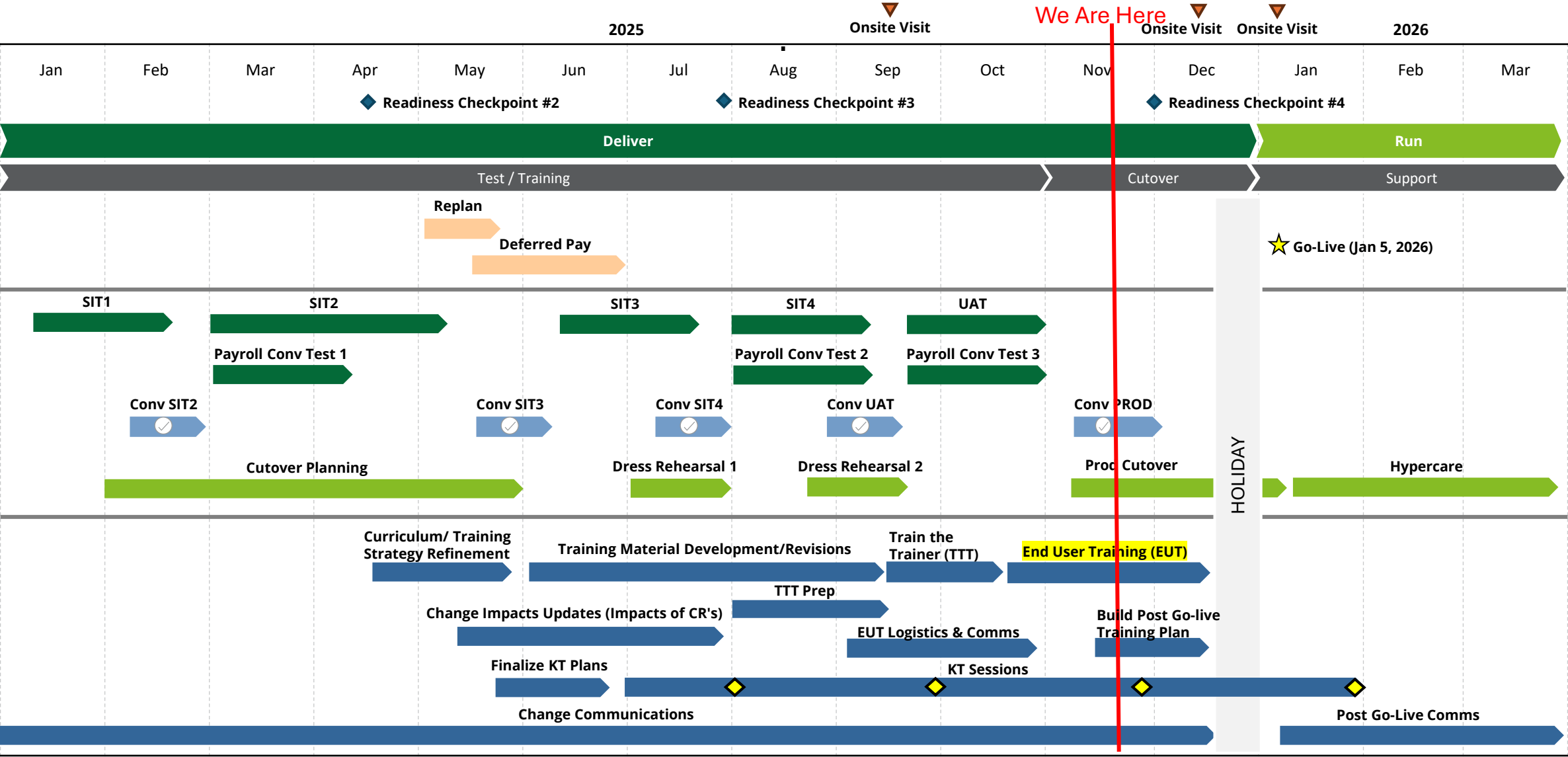**November 18, 2025**

AGENDA

- All SOAR All the Time!
- Announcements & Deadlines

SOAR Timeline | Transition to Oracle Cloud

Onsite Visit ▽

We Are Here

Onsite Visit ▽   **Onsite Visit** ▽

2025   **2026**

| Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |

◆ **Readiness Checkpoint #2**   ◆ **Readiness Checkpoint #3**   ◆ **Readiness Checkpoint #4**

Deliver   **Run**

Test / Training   **Cutover**   **Support**

Replan

Deferred Pay

⭐ **Go-Live (Jan 5, 2026)**

SIT1   **SIT2**   **SIT3**   **SIT4**   **UAT**

Payroll Conv Test 1   **Payroll Conv Test 2**   **Payroll Conv Test 3**

Conv SIT2 ✓   **Conv SIT3** ✓   **Conv SIT4** ✓   **Conv UAT** ✓   **Conv PROD** ✓

Cutover Planning   **Dress Rehearsal 1**   **Dress Rehearsal 2**   **Prod Cutover**

HOLIDAY

Hypercare

Curriculum/ Training Strategy Refinement   **Training Material Development/Revisions**   **Train the Trainer (TTT)**   **End User Training (EUT)**

TTT Prep

Change Impacts Updates (Impacts of CR's)

EUT Logistics & Comms

Build Post Go-live Training Plan

Finalize KT Plans

◆ **KT Sessions** ◆   ◆   ◆

Change Communications   **Post Go-Live Comms**

What's new on SOAR.memphis.edu?

New @ SOAR.memphis.edu

Visit SOAR.memphis.edu for new resources and updates.

Cutover

Check out the new [Cutover page](#) found under Resources.

Cutover Dates and Blackout Periods

As part of the University's transition to Oracle Cloud, launching Jan. 5. 2026, several critical deadlines and system blackout periods have been established to support a smooth migration. Please review the following information carefully and take necessary actions ahead of the specified dates. Normal operations will **resume on Jan. 5, 2026, in Oracle Cloud**.

Key Deadlines by Category:

Internships and Dual Service Agreements

- **Deadline:** Nov. 19

- No new entries for internships or dual service agreements in Cayuse after this date.

- **Action:** Enter items early to avoid processing delays during the blackout.

eContracts

- **Deadline:** Nov. 19

- No new eContracts may be submitted after **Wednesday, Nov. 19**, and **all approvals must be complete by Tuesday, Nov. 21** to allow for final processing. eContracts will be known as "Direct Hires" in Oracle Cloud. The Direct Hire process will be available in Oracle Cloud beginning Jan. 5, 2026.

Sponsor and Organization Codes

- **Deadline:** Nov. 26

- No new sponsor or organization codes will be added in Cayuse after this date.

- **Action:** Confirm required sponsor and org codes are already established for upcoming proposals.

SOAR Calendar

Check out the new SOAR Calendar for updates on cutover and events.

Have you registered for the November Town Hall?

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 out results to project leadership.
- Used to identify broad trends by varying corners of UofM. It does not collect or address concerns of individuals.

COMPLETED: SOAR Survey 4

Thank YOU!

- ⭐ **SOAR Survey 4 is under analysis!**
- ⭐ 286 of you submitted answers to the survey!
- ⭐ Congratulations to **College of Arts and Sciences Champions** for having the most surveys submitted!
  - o Latica Jones
  - o Cathy Wilhelm
  - o Paulette Wilkerson
- ⭐ Stay tuned for the final analysis!

Campus Engagements

SOAR Engagement and Resources

🏅 Dean / Faculty Engagement

🏆 Change Champions   🖥️ FOFHR   📰 Newsletter   ✉️ Cutover Communication   👥 Advisory   👤 Readiness Sessions   🏛️ Town Hall   📊 Org Change Readiness Survey

U of M

- **October Town Hall – Recording Available!**
  - View a recording of this Town Hall and other live sessions on the SOAR Mediasite.

- **November Town Hall – Nov. 19 @ 2:30PM**
  - **REGISTER HERE**

- Continue to watch your email for communications on Blackout dates.

- December Town Hall Registration Available Soon

- Keep the emails coming! Send your questions to SOAR@memphis.edu

- **Visit the training website regularly and schedule your classes soon**

- Stay patient and positive!

November 2025

SUN	MON	TUES	WED	THURS	FRI	SAT
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27 Thanksgiving	28	29
30						

Oracle Training

How to identify recommended training courses

Step 1.
Browse to the website SOAR.MEMPHIS.EDU

Step 2.
Select the "Training" option from the upper menu bar

Step 3.
Select the **"Training Wizard"** option

Training Wizard:

(You tell us the roles you play at the University & we'll tell you which trainings you should take!)

• **Training Wizard**

How to identify recommended training courses

Step 4. Start by selecting role(s).

Training (Sorted by Persona)

Select the role(s)/persona(s) that apply to you at the University. Once you have made your selections, the list populated below will represent the required Oracle trainings you are expected to take. Note that some specific positions may need other trainings beyond this generic standard.

Training Personas:

Filter by Training Persona
Select one or more personas to reveal matching courses.

[Select all]   [Clear all]

- ☐ Staff
- ☐ Faculty
- ☐ Principal Investigators (PI)
- ☐ Exempt Grad Assistant
- ☐ Non-Exempt Graduate Assistant
- ☐ Part-Time Faculty
- ☐ Student Worker
- ☐ Temporary Employee
- ☐ Line Manager (Direct Supervisor)
- ☐ Department Head

- ☐ Departmental Business Representative
- ☐ Department Purchaser
- ☐ Project Accountant
- ☐ Local Learning Administrator (Responsible for Training Employees in One Specific Area)
- ☐ Finance Central User
- ☐ Financial Reporting Central User
- ☐ Grants Central User
- ☐ Human Resources Central User
- ☐ Post-Award Central User
- ☐ Procurement Central User

How to identify recommended training courses

Step 5. As you select roles, recommended courses are identified.

Training (Sorted by Persona)

Select the role(s)/persona(s) that apply to you at the University. Once you have made your selections, the list populated below will represent the required Oracle trainings you are expected to take. Note that some specific positions may need other trainings beyond this generic standard.

Training Personas:

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- ☐ Line Manager (Direct Supervisor)
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- ☐ Project Accountant
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- ☐ Procurement Central User

17 Courses Identified

How to identify recommended training courses

Step 6. **Take note of training formats.**

- WBT — Web-Based Training (online 24/7)

- ILT — Instructor-Led Training (in person, instructor-led training)

- VILT — Virtual Instructor-Led Training (online instructor-led training)

Step 7. **Scroll to find and select course**

- *Recording* – These links are recordings from previous, VILT courses. You will be taken to MediaSite to watch/review the training. You do get credit for taking a course if you watch the full recording.
- *24/7 in Canvas* – These courses are web-based and can be viewed at your convenience.
- *Register* – These are upcoming courses that you can register; note the format (In Person or VILT).

Note: Courses where registration is crossed out is generally a course that has either passed or is no longer available for registration.

After go live, we will shift away from the various training formats and move to using the new Oracle Learn module.

After e-contract initiations are closed at the close of business on Nov. 19, HR will contact departments who have outstanding contracts that will be cancelled not in Shared Services by Nov. 21 close of business.

QUESTIONS?

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

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.
- These can be requested again starting January 5th.

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.

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 must 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 must 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 automatically 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 21st) due to shift to Oracle.**

- **ALL outstanding leave reports for ALL months must be completed by December 21st in order to transition away from Banner.**

Announcements & Deadlines

Next Online Training for *Effective Search Committees*:

- December 11, 2025, 10am
- Sign up in <u>Learning Curve</u>!

Announcements & Deadlines

Employee Recognition is Easy With an Updated Tiger Spotlight Program!

- 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 be sent 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

Congratulations to the recipients & nominees for the 8th Annual Excellence Awards!

- **Presidential Excellence Award:**
  Jaclyn Rodriguez, First Generation Student Success

- **Community Service Outreach Excellence Award**:
  Christopher Clark, Housing and Residence Life

Announcements & Deadlines

Division Excellence Awards:
- Maggie Bowers, Enrollment Management
- Latoya Boyland, Academic Affairs
- Amanda Clarkson, Business & Finance
- RayShauna Davis, Student Academic Success
- Bridget Ellis, Marketing & Communications
- Brian Evans, Research & Innovation
- Sam Gala, Information Technology Services
- George Hill, Student Affairs
- Darrell Turner, Athletics
- Monique Udell, Advancement
- John Whalen, Operations & Facilities Management

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** (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.

- Other questions? i9@memphis.edu

Announcements & Deadlines

- Remember to review the University's current job openings at workforum.memphis.edu.

- Follow the Division of Business & Finance on X (formerly Twitter) at [@uofmemphisbf](http://twitter.com/uofmemphisbf)!

- Subscribe to our WorkforUM X (formerly Twitter) feed at [@umemphisjobs](http://twitter.com/umemphisjobs)!

- Follow us on Instagram! [@uofmhr](http://instagram.com/uofmhr)

See you in 2026!

Happy Holidays!!!