



Welcome to Focus on Finance!

November 19, 2015

Agenda

- **Cayuse Implementation – Mary Earheart-Brown**
- **New MyMemphis Portal Information & Demo – Danny Linton**
- **Employee Terminations & Banner Access – Steve Lackey**
- **What's New? What's Due?**

Cayuse Implementation

Mary Earheart-Brown

Senior Assoc. Dir. Research Dev.

Division of Research & Sponsored Program

Evisions Research Suite

Cayuse SP

- Cayuse SP Sponsored Project Life Cycle Management System acts as a central repository to provide users with easy management and visibility in each phase of the project life cycle.
 - Will replace the paper Proposal Summary Form to allow for electronic routing.
 - Will provide transparency so that investigators, business officers, and Sponsored Project staff will know the status of a proposal at all times.
 - Will integrate with Cayuse 424 and IRB.

Cayuse 424

- Cayuse 424 is a System-to-System solution supporting over 98% of the opportunities in Grants.gov.
 - Will automatically update application packages and validate proposals prior to submission.
 - Will automatically populate forms to eliminate time-consuming data-entry.

Cayuse IRB

- Cayuse IRB provides users with access to the entire IRB review and submission process, including initial submissions, modifications, reportable events, and continuing reviews, all in one place.
 - Will streamline and automate the submission and review process.
 - Will serve as an online repository for approvals and other documentation.

Electronic Research Administration Software

Some benefits of eRA Software include:

- Consistent process
- Instant communication
- Transparency of status/process
- Central repository (records)
- Reduced cycle time

Cayuse Implementation Timeline

| Date | Selected Action Items | |
|---------------------|--|--|
| 3/7/2014 | UM Committee convenes to assess needs, issue RFP, select vendor | |
| 2/2/2015 | RFP issued | |
| 5/7/2015 | Committee selects Cayuse SP/424/IRB | |
| 8/12/2015 | Contract signed and approved by all parties | |
| 9/24/2015 | Cayuse Implementation Team has first meeting | |
| 9/15/2015-3/15/2016 | Cayuse Software Implementation Phase I (Installation and Testing) | |
| | November 2015 | UM Cayuse Implementation Webpage Live |
| | December 2015 | Campus Announcement via email |
| | January 2016 | Hands-on testing in campus computer labs |

Cayuse Implementation Timeline

| Date | Selected Action Items |
|---------------------|--|
| 3/15/2016-5/1/2016 | Cayuse Software Implementation Phase II (Pilot) |
| | 2/1/2016-5/1/2016 Establish user training materials and tech support protocols |
| 5/1/2016-12/31/2016 | Cayuse Software Implementation Phase III (Rollout and Training) |
| | 5/2016 & 8/2016 Extensive Cayuse training offered in campus computer labs |
| 12/31/2016 | Cayuse Software Implementation Phase IV (Final Transition to Cayuse SP/424) |
| | No paper routing forms accepted after 12/22/2016. |
| | All eligible grants will be filed via Cayuse 424 or Fastlane after 12/22/2016. |
| | Note: Final Transition to Cayuse IRB could occur prior to 12/31/2016. |

Questions



E-mail : Mary.Earheart.Brown@Memphis.edu

CayuseSupport@Memphis.edu

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Location: Administration Building Room 308

New MyMemphis Portal Information & Demo

Danny Linton

**Asst. Director, Functional Online Solutions
Human Resources**

New MyMemphis Portal

- Your MyMemphis portal will have a new look starting January 6, 2016
- Same Web address: **my.memphis.edu**
- Tabs are now “pages”
- Channels are now “portlets”
- You may use the new portal now! Until 1/6, it can be accessed at **myuofm.memphis.edu**
- Feedback about the new portal can be submitted via the new portal’s front page

New MyMemphis Portal

DEMO

Questions



Employee Terminations & Banner Access



**Steve Lackey
Controller
Accounting**

Banner Access for Terminated Employees

- **Terminated employees must be locked out of Banner for control purposes**
- **The Online Separation and Clearance form must be completed timely**
- **An automated script removes Banner access based on HR's service end date**
- **Grace period for those with approved future contracts**
- **Grace period has been extended to 45 days**
- **Faculty contracts need to be prepared timely**

Questions



Who Knew? / What's New? / What's Due?



What's Due? Workshop

Workshops

Date

Travel Workshop

Friday, November 20, 2015

ADMIN 178

9:00 - 11:30 AM

Budget Basics

Wednesday, January 27, 2016

UC – Senate Chamber Room 261

9:30 - 11:00 AM

Accounting Basics

Thursday, January 28, 2016

UC – Senate Chamber Room 261

1:30 - 3:00 PM

What's Due? Accounting

| Activity | Deadline |
|---|------------------------------|
| Last Accounts Payable Check Run Prior to Thanksgiving Holiday (Documentation should be received at least two weeks prior to deadline, Nov. 9th.) | Monday, November 23, 2015 |
| Time Sheet for BW24 Biweekly Payroll (Nov. 14th - Nov. 27th) | Wednesday, November 25, 2015 |
| Time Sheet for BW26 Biweekly Payroll (Dec. 12th - Dec. 25th) | Wednesday, December 16, 2015 |
| Last Accounts Payable Check Run of Calendar Year (In order to ensure payments are processed. Documentation should be received at least two weeks prior to deadline, Dec. 7th.) | Monday, December 21, 2015 |

What's Due? Accounting

| Activity | Deadline |
|--|-----------------------------|
| Fall Effort Report - If required , submit Salary Redistribution Form to Grants Accounting | Thursday, December 10, 2015 |
| Fall Effort Certification - July 2015 - December 2015 | Friday, January 29, 2016 |

What's Due? Bursar

| Activity | Deadline |
|--|---|
| Dining Dollars Refund Request Period-Fall 2015 | Monday, November 30 - Friday, December 11, 2015 |
| GA Fee Contracts for Spring Due to Graduate School | Tuesday, December 1, 2015 |
| PC191 Fee Waiver Spring Registration Begins | Monday, December 21, 2015 |
| Law School Departmental Fee Waiver Deadline | Tuesday, January 5, 2016 |
| Departmental Fee Waiver Deadline | Friday, January 8, 2016 |
| Law School Spring Fee Payment Deadline | Tuesday, January 12, 2016 |
| Law School Spring First Day of Class | Wednesday, January 13, 2016 |
| UG/GR Spring Fee Payment Deadline | Friday, January 15, 2016 |
| UG/GR Spring First Day of Class | Tuesday, January 19, 2016 |

Next Focus on Finance
December 17, 2015
1:30 - 3:00 PM
UC Memphis Room 340

Comments or suggestions?
Email: bffin@memphis.edu

Focus on Finance website:
<http://www.memphis.edu/focusonfinance>



THANK YOU!

www.memphis.edu/finance