



FOCUS ON FINANCE & HR

May 21, 2024



AGENDA

- SOAR Project Updates
- Special Issues in Recruitment of Foreign Nationals
- Department of Labor Threshold Increase: The Impact for Our Campus
- Wireless Communication Device Allowance Form
- Announcements & Deadlines

SOAR Project Updates



Shundra White, Director ITS Service Desk
Heidi Kendall, Director, B&F Reporting & System Initiatives

SOAR

SOAR is a multi-year transformation effort that will change the way UofM conducts financial and human resources business processes by replacing current finance and HR systems with Oracle Cloud.

Why the Change?

- HR and Finance processes, reports, and technologies have **pain points** that **hamper faculty and staff to effectively do their work**
- Current systems are **aging and fragmented**, with an increasing number of **bolt-ons** and **workarounds**
- We must **create efficiencies, replace manual processes** and duplicate data entries **with standard simplified business processes**
- Need **automation, workflows, tracking** and **improved self-service**
- Desire **robust reporting capabilities** with **increased data transparency**
- Banner has reached its life on premise and **needs to shift to a modern user interface**

Benefits of the Change

Reduce & Consolidate Systems	Streamline & Automate Processes	Deliver Robust Reporting
Provide Real Time Visibility Into Business Processes	Introduce Improved Self Service Tools	Improve End User Experience

SOAR Timeline

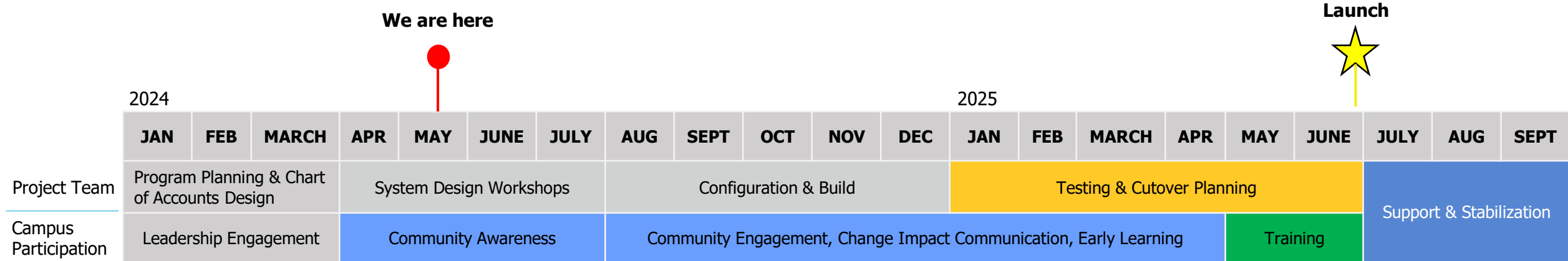


Chart of Accounts

- The Chart of Accounts team continues to discuss best practices for the COA with LGIs
- Based on stakeholder feedback, fund will continue to be one segment in the future state

Notable differences with the new Chart of Accounts:

- Entity segment is embedded within the future state chart of accounts
- Activity values will have enhanced definitions providing increased user value and robust reporting

Current State: FOAPAL



Future State: Chart of Accounts (COA)



COA Segments

Entity	Fund	Organization	Account	Program	Initiative	Activity	Future 1
<p>Identifies major institutional operating units.</p> <p>Examples: University, Foundation, HERFF and Auxiliary Services Foundation</p>	<p>The Fund segment identifies overall spending restriction of the fund source.</p> <p>Track budget restrictions and spending.</p>	<p>Activity represents the divisional breakdown based on operation and function for financial activity.</p>	<p>Account classifies nature of transaction.</p> <p>Examples: asset, liability, expense, revenue, net position</p>	<p>Classifies the nature of the University's major areas.</p> <p>Examples: instruction, research, public services, student services, etc.</p>	<p>A cross-organization used segment to identify activity for organization initiatives and/or where two or more departments contribute.</p>	<p>Identify and group organizational unit projects, special events and other items that do not align with other segments.</p>	<p>A segment that allows for growth in the future.</p>

Stay Engaged & Informed

Your Guide to Finding Resources and Help as we advance UofM financial and human resources systems

<https://soar.memphis.edu/>

SOAR Virtual Town Hall

May 31 | 1 – 2:30 PM

Join us for the first SOAR Town Hall and hear from SOAR team members about program milestones and recent progress.

[Register Here](#)

SOAR Newsletter

Did you miss the April Newsletter?

You can find the most recent edition on the SOAR website.

[April Newsletter](#)



Special Issues in Recruitment of Foreign Nationals



Darren Wibberding
Litigation & Records Legal Professional | Office of Legal Counsel



Commonly Used Visas

- **J-1, Exchange Visitor Visa**

- Cultural Exchange; Assumption that visitor will return to home country
- Short-term, less than 5 years
- 2-year home residency; 12 &/or 24-month bars
- Must have at least a bachelor's
- Insurance Requirements

- **H-1B, Specialty Occupations**

- Temporary (up to 6 years in 3-year increments), with very limited exceptions under AC21
- Specialty occupation requires the application of specialized knowledge
- Must have at least a bachelor's & position must generally require same
- Wage Analysis



Begin with the end in mind

- **Lawful Permanent Resident a/k/a “Green Card holder”**
 - I-485 Application to Register Permanent Residence or Adjust [USCIS]
- **EB-2**
 - I-140 Immigrant Petition for Alien Worker [USCIS]
 - Permanent Labor Certification (PERM) [DOL]
 - Prevailing Wage Determination (PWD) [DOL]
- **H-1B**
 - I-129 Petition for a Nonimmigrant Worker [USCIS]
 - Labor Condition Application (LCA) [DOL]



Timing is key

H-1B

- Complete LCA 6 months before start date {2 weeks}
- File after LCA is certified
 - 15 business days with premium processing
 - 4 to 6 months regular processing
- Visa Processing {days to months}
- Consider June 1 and October 1 as cut-off dates for Fall and Spring start dates, respectively.

EB-2 to LPR

- Prevailing Wage Determination {~9 months}
- Permanent Labor Certification {13 to 14 months}; must file no later than 18 months after offer date.
- I-140 {4 to 6 months}
- I-485 {36 months}

Recruitment – Special Handling (teaching)



- **Keep it simple (no more, no less): job title, job duties (must include teaching), minimum education and experience requirements (in months), all job location(s), travel requirements, and number of employees being supervised.**
- **Posting in a National Professional Journal**
 - The Chronicle of Higher Ed (1 print ad or 30 day online) is the gold standard
 - Postings must be the same across multiple postings (no short & long)
 - WorkforUM posting must match
 - Save a dated version of each online ad, posting, listserv email, etc. – if online ad, print with first, middle, & last day of posting
- **Select the most qualified candidate**
 - Detailed recruitment summary including comparison against other candidates

Common Issues for LCA, PWD, and PERM filings



- **Unclear/vague, unquantifiable, or unevidenced requirements**
- **Failure to properly advertise (different ads, job boards)**
- **Candidates don't meet all MQ's & DQ's**
- **Lack of recruitment documentation (all position postings, evaluation of candidate pool, selection decision basis)**
- **Salary doesn't meet or exceed Prevailing & Actual Wages**
- **Beneficiary doesn't have degree "in-hand"**
- **Changes in location and/or job functions**

Recruitment Issues Involving Immigration Status



- **Non-Discrimination Requirement**
 - No Discrimination Allowed Between U.S. Citizens, U.S. Nationals, Permanent Residents, Asylees, Refugees, and 1986 amnesty program's "Temporary Residents."
 - NOT allowed to ask "Are you a U.S. Citizen?" or "Do you have a Green Card?"
 - NOT allowed to request specific documents or to require "more or different" documents than the minimum required.
- **Employers May Elect Not to Hire Candidates Needing "Immigration Sponsorship"**
- **Recruiters ARE allowed to ask "Are you legally authorized to work in the United States?" followed by "Will you now or in the future require sponsorship for an employment visa status?" (e.g., H-1B visa status)**



What to Expect

- **Each case is fact specific – each foreign national's situation is unique; each position is different**
- **Processes often take extended time and are out of our control**
- **Must have a Point of Contact for the Department**
 - Contact must route and manage questions, issues, responses
 - Work with the department and the employee
 - Don't just CC our office with the employee
- **Details matter – keep documentation of every step & req.**
- **Increases in processing time and fees**



Fees & Legal costs

Visa	Employer	Employee
J-1	\$0	\$220 (SEVIS) \$185 (visa)
H-1B	\$460 (app) \$500 (fraud) \$2,805 (prem)	\$205 (visa)
EB-2	\$700 (app)	\$0
LPR	\$0	\$1,140 (app) \$85 (bio)

Visa	Legal Fees
J-1	\$2,000
H-1B Renewal	\$3,000 \$2,500
EB-2	\$6,000
O-1	\$4,500
TN	\$2,500

Expect both fees & legal costs to continue to rise over time.

Current Issues



- **Determine before recruitment if you will sponsor or not.**
 - \$ & ⌚
- **Job Ads are the biggest issue.**
 - Keep It Simple! Broad enough to capture your pool, but not vague. Quantified requirements.
 - National Professional Journal posting is required.
 - MQ's & PQ's are required at time of selection (think ABD and experience)
- **Quick Hire & Foreign National Hire are often mutually exclusive.**
- **OLC files petitions ≠ personal immigration attorney or international faculty services.**
- **Plan Ahead, Expect Delays, with Increasing Fees and Waits.**

Hiring Internationals



QUESTIONS?

Department of Labor Threshold Increase: The Impact for Our Campus



Kristil Davis, Director of HR Strategic Initiatives & Talent Management



Background Information

- Fair Labor Standards (FLSA) is a federal law that governs whether employees receive overtime pay.
- Department of Labor (DOL) is responsible for ensuring compliance with the FLSA.
- DOL is tasked with updating the FLSA regulations.
- Under the FLSA, employees in the US must be paid at least the federal minimum wage for all hours worked and overtime pay at not less than time and one-half the regular pay for all hours worked over 40 hours in a workweek.

Background Information

- Section 13(a)(1) of the FLSA provides an exemption from both the minimum wage and overtime pay for employees classified as executive, administrative, professional and outside sales employees.
- To qualify for exemption, employees must meet two tests: (1) the duties test and (2) salary threshold.
- Current exemption threshold is \$684 per week or \$35,568 annualized.

Key Changes

- On April 23, 2024, DOL issued the final rule to expand overtime protections for lower-paid salaried workers:
 - Increases salary thresholds
 - Increases the Highly Compensated Employees (HCE) threshold
 - Implements automatic threshold updates



Increased Salary Thresholds

- Effective July 1, 2024, salary exemption increases to \$844 per week or \$43,888 annualized (Phase I).
- Effective January 1, 2025, salary exemption increases to \$1,128 per week or \$58,656 annualized (Phase II).
- Beginning July 1, 2027, and every three years thereafter, the salary thresholds will automatically update depending on the methodology in effect at the time of each update.

General Impact

- Non-exempt (overtime eligible) employees are not impacted.
- Exempt employees (overtime ineligible) who earn less than the new salary threshold based on weekly earnings will be impacted in one of the following ways:

- ① Some impacted employees **will become non-exempt**. They will become eligible for overtime compensation for hours worked over 40 in a workweek.
- ② Some impacted employees **may receive salary adjustments** and **remain exempt**. They will continue to be ineligible to earn overtime for any time worked over 40 hours.
- ③ Some exempt employees earning less than the new threshold may meet additional exemptions and **will not require an increase** and **will remain exempt**.
- ④ Some exempt employees **earning more** than the new FLSA salary threshold **will become non-exempt** if their corresponding job classification as a whole converts to non-exempt.

General Impact (Cont.)

- Part-time employees (less than 1.0 FTE) will convert to non-exempt regardless of the salary amounts.
- Employees who move from exempt to non-exempt:
 - Will have more detailed timekeeping requirements; however, nothing about their work will change.
 - They will not experience changes to their duties, base pay or benefits.

University Impact



All Exempt Staff & Impact		
Phase 1 July 1, 2024	Total Count <\$43,888	134
Phase 2 January 1, 2025	Total Count <\$58,656	539*

Total Count of Exempt Employees = 1181

**Count includes the original 134 in Phase I*



What Happens Next...Phase 1

- HR will finalize position assessments and recommendations and share with the Executive VP/COO/CFO & President.
- Notifications will begin to go out to all supervisors of employees who may be impacted by Phase I in the next few weeks.
- Notifications will begin to go out to all employees who may be impacted by Phase I in the next few weeks.
- Positions changing to non-exempt will be converted effective June 29, 2024 ([BW 15](#)).



What Happens Next...Phase 2

- HR will continue to finalize position assessments and recommendations and share with the Executive VP/COO/CFO & President.
- Notifications will go out to all supervisors of employees who may be impacted by Phase II in November.
- Notifications will begin to go out to all employees who may be impacted by Phase II in November.
- Positions changing to non-exempt will be converted effective December 28, 2024 ([BW 2](#)).

Questions that may arise

- I have the budget to increase my employee's salary, can I do so?
 - Not necessarily. The university cannot have similar or same titles classified differently. HR will be assessing jobs individually and as a whole to make recommendations.
- What happens to my insurance and retirement?
 - There will be no changes to any insurance or retirement plans.
- Will I lose my 15 hours of annual leave accruals now that I am converting to non-exempt?
 - HR has recommended grandfathering the leave accruals for all exempt employees converting to non-exempt. This decision is pending final approval.
- Converting to non-exempt feels like I will earn less money monthly. Why is this?
 - Biweekly employees are paid over 26 pay-periods in a year. It is important to not try to calculate your monthly salary based on two bi-weekly pay periods, as that equates to 24 pay-periods and not 26.
- Why is HR implementing this rule?
 - This is a federal mandate, not a University initiative.

Department of Labor Threshold Increase: The Impact for Our Campus



QUESTIONS?

Wireless Communication Device Allowance Form



Danny Linton, Associate Director of Human Resources

Wireless Communication Device Allowance Form



- The form used for granting, changing, or removing an employee's cell phone allowance is changing.
- Moving from PDF format to online Softdocs form.
- Must be originated by department admin/business officer, and signed by employee & department head. Processed by Human Resources.

Wireless Communication Device Allowance Form



DEMO

Wireless Communication Device Allowance Form



QUESTIONS?



Announcements & Deadlines



Danny Linton, Associate Director of 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



Announcements & Deadlines

- Remember to review the University's current job openings at workforum.memphis.edu.
- Follow the Division of Business & Finance on 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)

Year-End Deadline Reminders



Activity	Deadline
Start Reviewing Financial Activity (Banner Self- Service or E-print) and Tigerbuy POs (FPIOPOF)	On-going
FY24- De-obligate or Expire Unused Encumbrance Balances: Non-Travel Purchase Orders Submit Change Order procurement@memphis.edu	Start Process: Friday, May 31, 2024
Complete FY24 Purchase Order by Receipting Goods and Services: Tigerbuy for all Vendors, including Staples: Submit Payment Request through Vendor Payment Transmittal Portal	Friday, June 14, 2024
FY24 -Upload Receipts for Chrome River Travel and Non-Travel Claims: Travel Inquires - sharedservices@memphis.edu Non- Travel Inquires - accountspayable@memphis.edu (Travel trip with end date of July will be charged against FY25 funds)	Friday, July 05, 2024
FY24 Last Day to Submit Invoices: Submit Payment Request through Vendor Payment Transmittal Portal	Friday, July 05, 2024
Time Sheet for BW13 Biweekly Payroll (June 2nd - June 15th)	Friday, June 14, 2024
Time Sheet for Split BW14 Biweekly Payroll (June 16th – June 30th)	Thursday, June 27, 2024
FY24 <u>Transfer Vouchers:</u> accounting@memphis.edu	Monday, July 08, 2024
FY24 Submit Invoices for Accruals to Accounting accounting@memphis.edu	Start Accepting Accruals Monday, July 08, 2024 Projected End Date for Accepting Accruals Wednesday, July 31, 2024

Year-End Deadline Reminders



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FY24- De-obligate or Expire Unused Encumbrance Balances:	
Non-Travel Purchase Orders	Start Process: Friday, May 31, 2024
Submit Change Order procurement@memphis.edu	
Complete FY24 Purchase Order by Receipting Goods and Services:	
Tigerbuy for all Vendors, including Staples: Submit Payment Request through Vendor Payment Transmittal Portal	Friday, June 14, 2024
FY24 -Upload Receipts for Chrome River Travel and Non-Travel Claims:	
Travel Inquires sharedservices@memphis.edu Non- Travel Inquires accountspayable@memphis.edu	Friday, July 05, 2024
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- FY24 Year-End Procurement Deadlines [are available here](#).



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. Then contact your supervisor and Human Resources as soon as possible to start the claim process.
- In a non-emergency, notify your supervisor immediately 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 call 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 found online at First Report of Injury or Illness. This form should be returned 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

- Benefits Open Enrollment Dates for 2025 elections will be from Oct. 1-18, 2024.
- Benefits Fairs:
 - Central Campus: Oct. 2
 - Lambuth Campus: Oct. 3
- Reminders about HSAs



Announcements & Deadlines

- Effective July 1, 2024, the State of TN will revert the 401(k) match back to \$1 for every \$1 contributed by the employee, up to \$50 per month for an employee contribution of \$50.
- This is down from a match of up to \$100 last year.
- Please note that to receive the maximum match of \$50, the employee must contribute \$50. Employees who currently contribute less than \$50 per month will need to increase their contributions to \$50 in order to receive the maximum match.
- For any updates to current contributions, you must access your online RetireReady account at <https://retirereadytn.empower-retirement.com>.



Announcements & Deadlines

We're Getting a Raise!

- A 2% across-the-board salary increase has been approved for University employees, effective July 1, 2024.
- To qualify, employees must have been hired on or before January 8, 2024.
- For non-exempt employees, the first biweekly check received in FY25 (on July 5) is still paying out the final days of the old rate of pay. The July 19 check will be the one reflecting the raise.
- Nine-month faculty raises will be effective September 1, 2024.
- The minimum salary rate for all part-time faculty (even new PTF) will increase to \$837 per credit hour, starting with the Fall 2024 semester. Departments already paying more than the minimum should adjust their rates by 2% accordingly.
- Not included in this increase are temporary employees, student workers and graduate assistants.



Announcements & Deadlines

Separation & Clearance

- Please remember to immediately complete an online separation notice for any employee in your area that is departing the University!
- 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 clearances closer to the date of separation so that leave balances can be accurately calculated for payouts. Therefore, if you submit a clearance far in advance, it may not be immediately processed.
- <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.



Announcements & Deadlines

Records Inventory Due May 31, 2024

- Trainings in [Learning Curve](#) under University Records Management Training



Announcements & Deadlines

- Staff performance appraisals in SAMS were due April 30, 2024 for all non-probationary staff employees.
- If an appraisal was not completed, you are encouraged to get it done by June 30, 2024.
- <https://www.memphis.edu/performance>



Announcements & Deadlines

Next Effective Search Committees training:

- June 13, 2024, 10am
- Sign up in [Learning Curve!](#)



Announcements & Deadlines

Next E-Contract training:

- Graduate Assistants: June 27, 2pm in AD177B
- Sign up in [Learning Curve!](#)



Announcements & Deadlines

Next WorkforUM training:

- July 31, 1:30pm in AD177B
- Sign up in [Learning Curve!](#)



Announcements & Deadlines

Form I-9 Information

- Appointments not needed during regular business hours.
- Visit 178 Administration Building, M-F 8-4:30.
- HR is also offering online appointments by contacting i9@memphis.edu.
- Other questions? i9@memphis.edu



Announcements & Deadlines

- The University will no longer offer Zoom after August 12, 2024. Plan to use Microsoft Teams as an alternative.
- Focus on Finance & HR will continue to use Zoom until the current cycle of meetings concludes in June 2024.



Thank you for attending!

Next Meeting: June 18, 2024 @ 2:30pm

Recordings & presentations available at *memphis.edu/focus*