FOCUS ON FINANCE & HR

November 19, 2024

AGENDA

- SOAR Project Updates: Understanding Changes Coming Across Workstreams

- Announcements & Deadlines
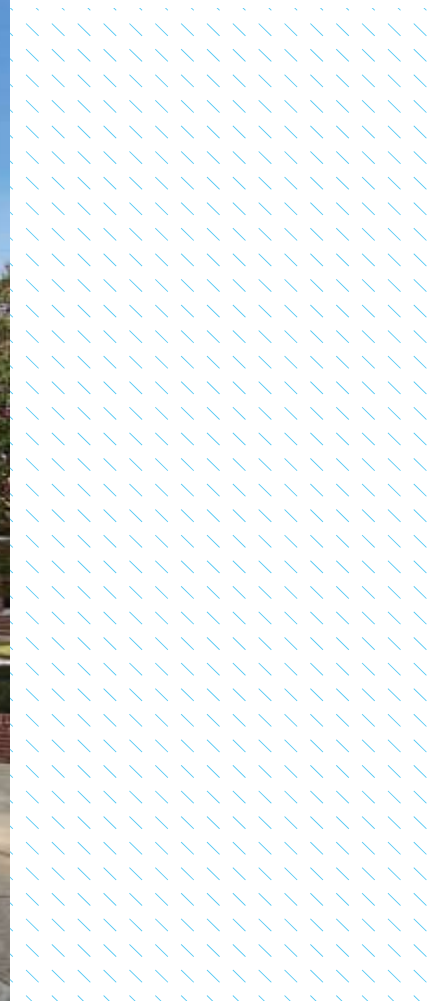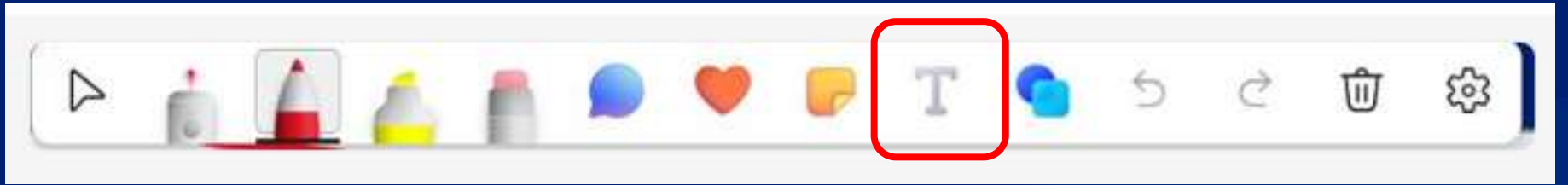
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SOAR: What's Changing

SOAR is a transformation initiative, moving UofM's administrative operations to an **integrated cloud-based system, Oracle**.

The main goal of this project is to provide modern systems that bring real **value, efficiency and robust reporting** to our faculty and staff users across campus.

Systems and associated business processes transitioning to Oracle Cloud on July 1, 2025.

Tiger Buy
Chrome River
Fixed Assets Workflow
Spreadsheet Budgeting
Records Inventory
WorkForum
Kronos
Web Time Entry
eContract
Learning Curve
Separation and Clearance Form
Employee Information Updates
SAMS Performance Reviews
Budget Revision /
Budget Transfer Form

ORACLE®

Human Capital Management (HCM)

Amanda Clarkson

Kristil Davis

HCM: Job Requisition, Application & Screening

❶ Job Requisition

- o The Department Initiator will create a **job requisition.** The job requisition captures the position that is to be filled, hiring team, posting description, and other details. Some of this information will be pre-populated.

- o Through an automated workflow the job requisition will go to a HR Business Partner, **called a Recruiter in Oracle**, for review, approval, and posting.

❷ Candidate Application & Screening

- o There will be 2 job boards, one for internal candidates and one for external candidates.

- o **Candidate Selection Process:** the steps of pre-screening, screening, and interviewing.

    - o **For all Staff roles,** HR will do the initial screen of all applicants.

    - o **For Faculty,** the search committee will complete the initial screen of all applicants.

❸ Interview Scheduling

- o An interview schedule can be set up and then selected candidates can log online and self-select time blocks for an interview. The candidate can also cancel and reschedule.

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HCM: Offer

➢ For faculty and staff roles: Department Initiator will begin the process and then the offer will automatically route through the appropriate approvals.

Candidate **status will be updated within Oracle** to coincide with a verbal offer to the final candidate.

Prepare, Review, and Send Offer
- **Library of offer templates** to help streamline and ensure consistency across offers.
  - Future state will have 9 offer templates.
- Once offer is **submitted for approval via system automated workflow.**

Final Candidate will sign offer, typically completed within Oracle, and background check process begins.

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HCM: Direct Hire

E-Contract = Direct Hire

The following scenarios will be completed through the direct hire process:

- One Time Pay
- Extra Compensation Non-Teaching
- Faculty Summer Compensation
- GA Appointments
- Part-Time Faculty
- Temporary Employees
- Student Workers

Benefits

- Increased efficiency
- Same validations between Banner and Oracle
  - Confirming student eligibility by credit hour
  - Confirming course information
  - Confirming federal work study aid amount
- Visibility into the process
- The journey starts and ends with you

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HCM: People Assignments

Banner Job Records = Oracle People Assignments

Understanding Assignments

1. All employees will have a primary assignment.

2. Assignments and salary are separate data points.

3. Interim roles are an assignment.

4. Any temporary duties will not be an additional assignment, this will transition to a salary component (non-exempt) or Individual Compensation Plan (exempt).

Understanding Individual Compensation Plans

➢ We will manage ad-hoc payments through individual compensation plans (ICPs).

➢ There will be a library of ICP's, **the employee's supervisor will assign an ICP to an employee which then electronically routes through an approval workflow** .

➢ ICP Examples:

• Supplemental Pay	• Relocation Payment	*Deduction Examples*
• Mobile Allowance	• Bonus	• Parking Services
		• Rec Center Membership

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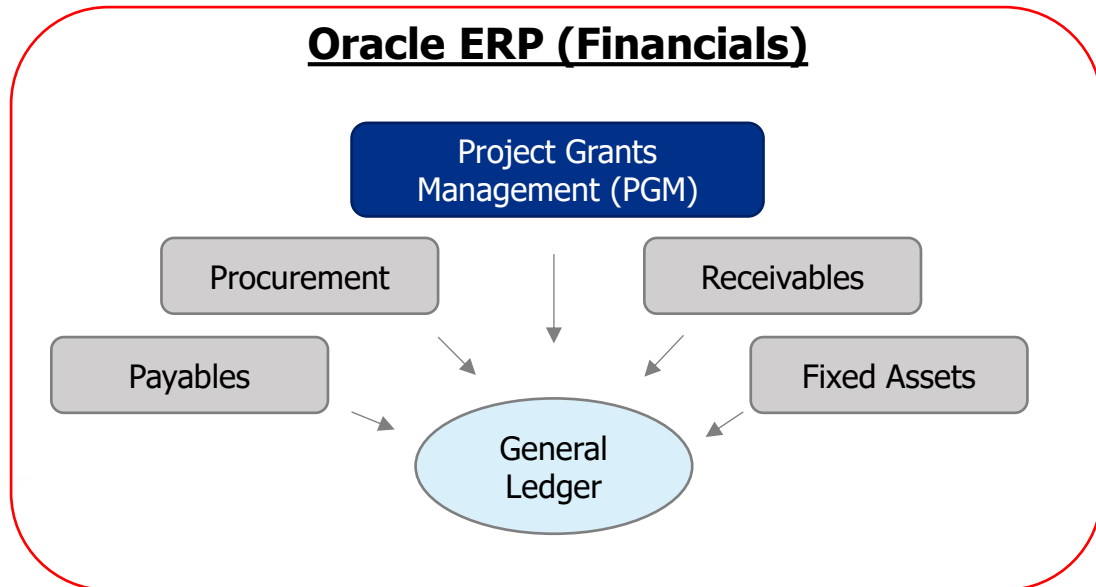# Project Grants Management (PGM)

Terrice Watson

The Project Grants Management (PGM) module is a subledger in Oracle.

PGM is used to track more complex projects that require additional monitoring.

Sponsored Projects, Internally Funded Faculty Projects, and Capital Projects will be managed within PGM.

Oracle ERP (Financials)

Project Grants Management (PGM)

Procurement

Receivables

Payables

Fixed Assets

General Ledger

Key Concepts

➤ Transactions charged to projects use the **POETAF chartstring** to capture the details of the project to be charged.

➤ POETAF is used in all subledgers (AP, Procurement, Expenses etc.) **when entering a project transaction.**

➤ Oracle will be configured so that **POETAF values translate and roll up to applicable Chart of Accounts (COA) segments in the General Ledger (GL).**

PGM: POETAF

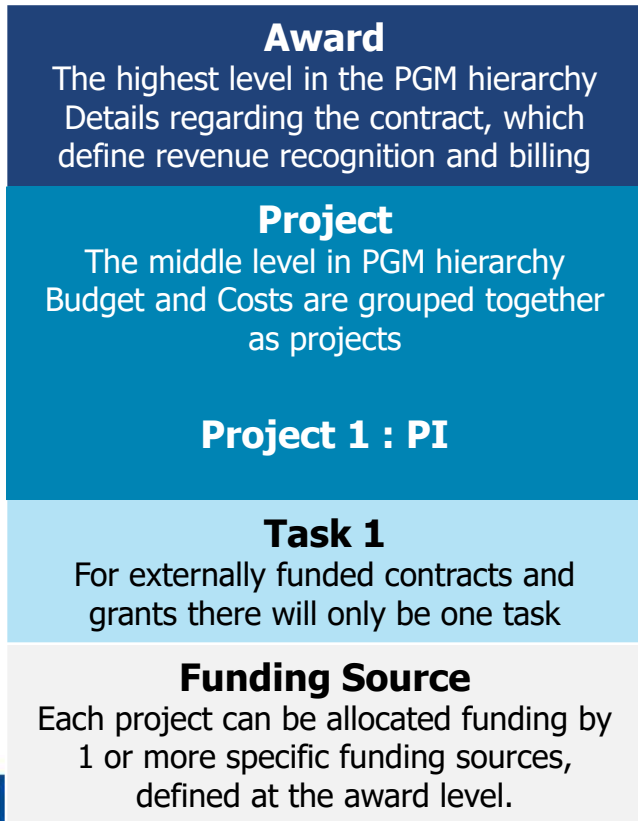| Segment	Description
Project Number	Represents a "body of work" that often has a start and end date that spans across fiscal years Represents the Contract and Grant, Internally Funded and Capital Project
Expenditure **O**rganization	Represents the academic operating unit responsible for the transaction
Expenditure Type	Classifies the nature of the transaction (asset, liability, expense, revenue)
Task Number	Identifies the activities used to break down a PGM project future Tasks allow for further detail when assigning budget and costs within a project
Award Number	This is an umbrella record containing overall financial and demographic information
Funding Source	Identifies the external sponsor or internal funding source

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PGM: Post Award Management

Once a notice of award is received, award data will flow from Cayuse to Oracle for set up and post-award management.
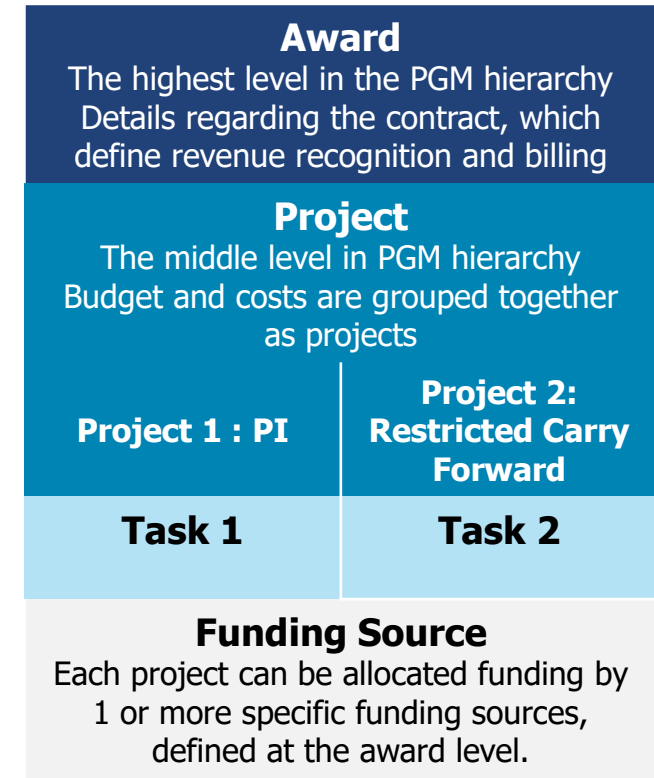
Sponsored Projects Award Set Up – Data Hierarchy:

Award
The highest level in the PGM hierarchy
Details regarding the contract, which define revenue recognition and billing

Project
The middle level in PGM hierarchy
Budget and Costs are grouped together as projects

Project 1 : PI

Task 1
For externally funded contracts and grants there will only be one task

Funding Source
Each project can be allocated funding by 1 or more specific funding sources, defined at the award level.

An award will have at least one Project but, multiple projects can exist.

When the following scenarios exist, additional projects are created:
• Restricted Carry Forward
• Task Based Projects
• Cost Share
• Participant Support (Different F&A rate)

Every project will always have 1 associated task.

In this example award set up there is **Restricted Carry Forward** on the award. This requires a second Project with the required Task.

Award
The highest level in the PGM hierarchy
Details regarding the contract, which define revenue recognition and billing

Project
The middle level in PGM hierarchy
Budget and costs are grouped together as projects

Project 1 : PI	Project 2: Restricted Carry Forward
Task 1	Task 2

Funding Source
Each project can be allocated funding by 1 or more specific funding sources, defined at the award level.
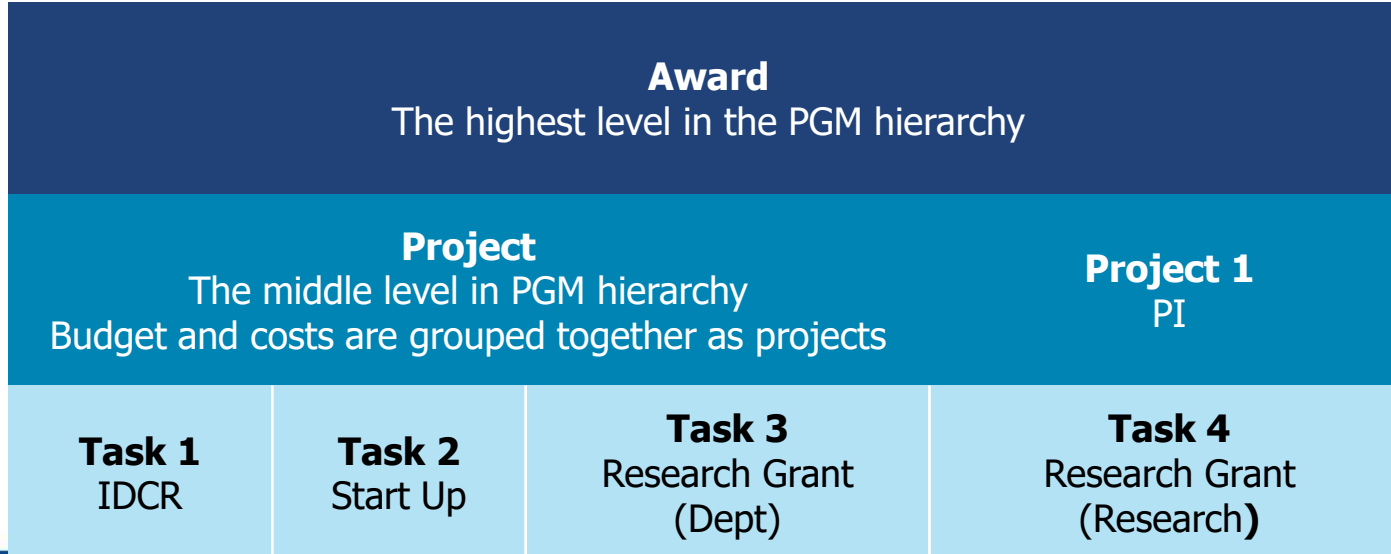
PGM: Post Award Management

Internally Funded Projects

Budgets for Internally Funded Projects will be entered by the Department with approval by Financial Planning.

Internally Funded Projects will have Absolute Budget Control. If Budget is not available, the expense transaction will fail.

Internally Funded Projects Award Set Up – Data Hierarchy:

Award The highest level in the PGM hierarchy			
Project The middle level in PGM hierarchy Budget and costs are grouped together as projects			**Project 1** PI
Task 1 IDCR	**Task 2** Start Up	**Task 3** Research Grant (Dept)	**Task 4** Research Grant (Research**)**

Internally funded projects are defined by one Project per Principal Investigator

And are further broken out by tasks:
Tasks 1 - IDCR, 2 - Start Up, 3 - Research Grant (Dept),
4 - Research Grant (Research)

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PGM: POETAF Examples

Project Number - Expenditure **O**rganization - **E**xpenditure Type -**T**ask Number - **A**ward Number - **F**unding Source

POETAF	Project Number	Expenditure Organization	Expenditure Type	Task Number	Award Number	Funding Source
External Sponsor	A250015A	23200 - Instruction Curriculum Leadership	74250 - Supplies	01	A250015	National Institute of Health
	A250015A-23200-74250-01-A250015-National Institute of Health (POETAF)					
Internally Funded	F100000 A. Jones CEPR	23100 - Counsel Education Psych Research	74251 - Computers	Task 1 – IDCR		
	F100000 A. Jones CEPR	23100 - Counsel Education Psych Research	74207 - Dues & Subscriptions	Task 2 - Start-Up		
	F100000 A. Jones CEPR	23100 - Counsel Education Psych Research	74200 – Consulting Services	Task 3 - Research Grant (Dept)		
	F100000 A. Jones CEPR	23100 - Counsel Education Psych Research	74250 - Supplies	Task 4 - Research Grant (Research)		
	F100000 A. Jones CEPR – 23100-74251-01 (POET) F100000 A. Jones CEPR – 23100-74207-02 (POET) F100000 A. Jones CEPR – 23100-74200-03 (POET) F100000 A. Jones CEPR – 23100-74250-04 (POET)					

PGM: Subawards

No significant changes to subaward initiation: Subawards will be auto-approved as POs.

Subaward Payment Process

Current State

1. PO created for Subaward.
2. Department receives Invoice
3. PI signs a paper invoice.
4. Invoice routed to Accounting for payment.

Future State

1. PO created for Subaward.
2. Invoice will go to AP for entry.
   ➢ A PO number will be required so AP can easily identify, need to ensure documentation of the PO number on the invoice.
3. Electronically routes to the Dept Business Representative for review
4. Electronically routes to the PI for final review and approval
   ➢ The final PI review and approval serves as confirmation that services were received.
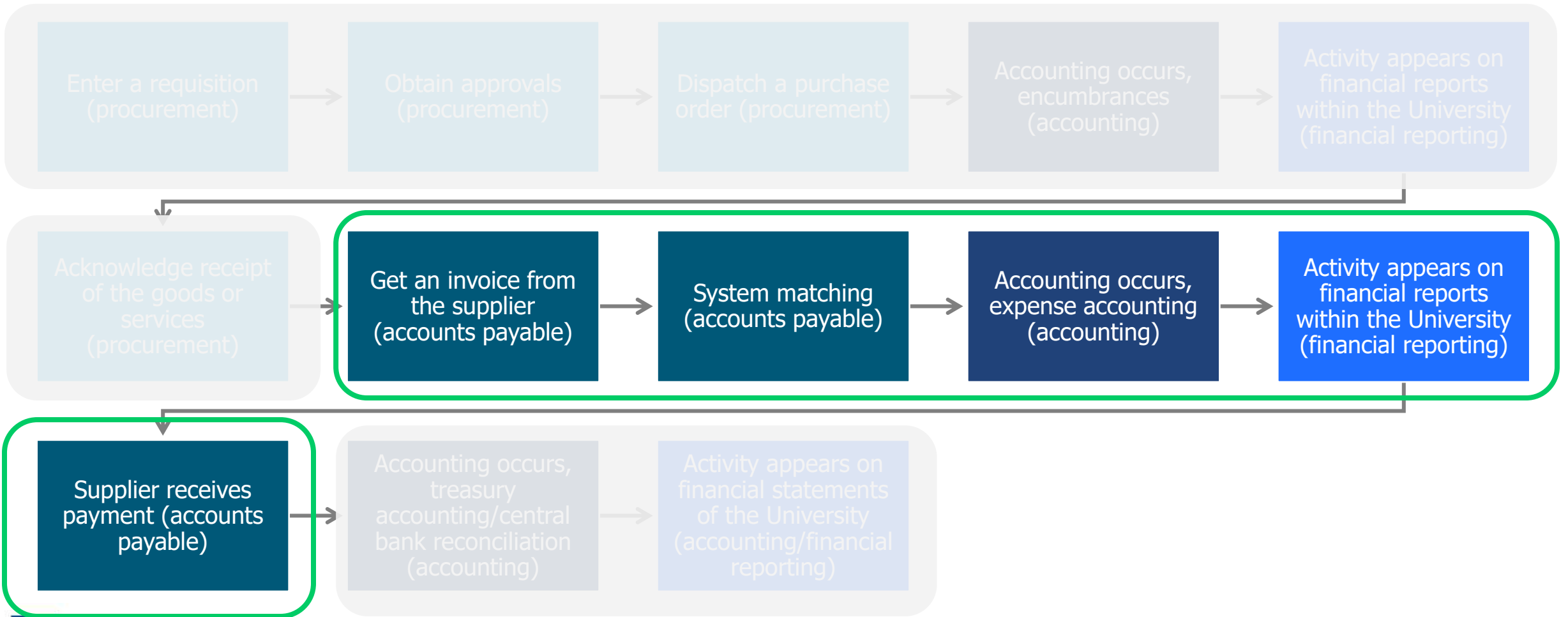
Procure to Pay (PTP)

Kerri Reece

PTP: Procure to Pay Life Cycle

The full process takes place within Oracle.

| Enter a requisition (procurement) | → | Obtain approvals (procurement) | → | Dispatch a purchase order (procurement) | → | Accounting occurs, encumbrances (accounting) | → | Activity appears on financial reports within the University (financial reporting) |

| Acknowledge receipt of the goods or services (procurement) | → | Get an invoice from the supplier (accounts payable) | → | System matching (accounts payable) | → | Accounting occurs, expense accounting (accounting) | → | Activity appears on financial reports within the University (financial reporting) |

| Supplier receives payment (accounts payable) | → | Accounting occurs, treasury accounting/central bank reconciliation (accounting) | → | Activity appears on financial statements of the University (accounting/financial reporting) |

PTP: Procure to Pay Life Cycle

PTP: Invoices

| Get an invoice from the supplier (accounts payable) | System matching (accounts payable) | Accounting occurs, expense accounting (accounting) | Activity appears on financial reports (financial reporting) | Supplier receives payment (accounts payable) |

- There are multiple ways an invoice can be created; most invoices will be automated.
- The system will auto-match an invoice to a PO and then auto-initiate the workflow.
- For invoices that do not match a PO the system will route the invoice for a manual workflow.
- AP will review, make corrections, and manually complete or put on hold.

PTP: Invoices

UofM Foundation is part of the General Ledger. This means we will have intercompany invoices.

Digital signatures will be accepted.

For invoices on a cadence, can use a recurring invoice functionality.

If an invoice is rejected it will go back to the beginning for edits and the process starts again.

An invoice will be placed on hold by errors that the system finds (e.g., match exception, tax variance).

Invoice Types

- Standard: from a supplier for goods/services
- Credit Memo: document extends a credit amount from a supplier for goods/services rendered
- Payment Request: from Oracle Expenses, Oracle Receivables, or an import payment request (external from Oracle), to disperse funds to a payee that is not defined as a supplier.

Resources

SOAR Resources Hub

SOFTWARE OF OPERATIONAL AND ADMINISTRATIVE RESOLVE (SOAR)

About   Vision & Guiding Principles   Training   **Resources**   Calendar

Chart of Accounts Foundational Learning

- **Chart of Accounts (COA) Overview**
- **Project and Grants Management (PGM) and POETAF Overview**
- **Chart of Accounts & POETAF Readiness Session Materials**

Newsletters

- **October 2024 SOAR Newsletter**
- **August 2024 SOAR Newsletter**

- **June 2024 SOAR Newsletter**
- **April 2024 SOAR Newsletter**

SOAR Mediasite Channel

Event Recordings & System Sneak Peeks
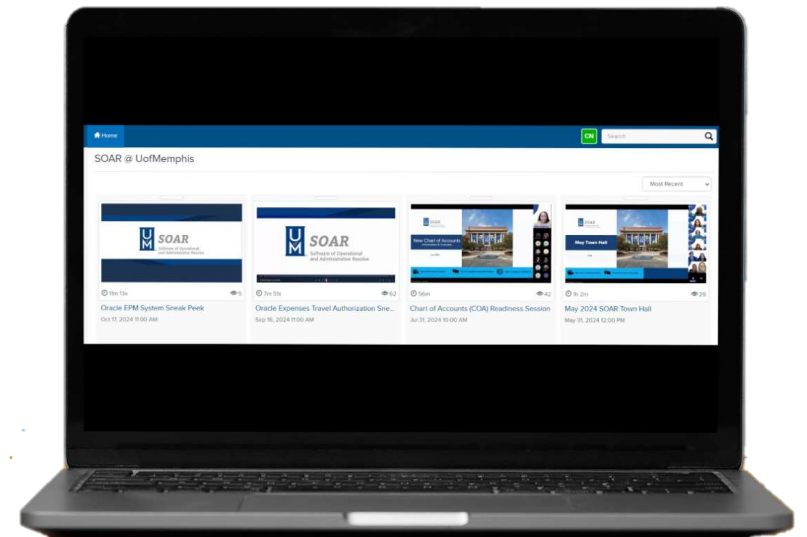
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BEST PRACTICES & STANDARDIZATION

COLLABORATION & TEAM SUPPORT

DATA & TRANSPARENCY

PROCESS ADOPTION

ON TIME & ON BUDGET

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Previously Released Future State Briefs

Future State Brief: Oracle Systems

Oracle ERP (Financials)

- A transactional system that is home to subledgers, often referred to as modules.

- Details of financial transactions are recorded in subledgers using module-specific attributes, fields, and/or segments from the Chart of Accounts (COA).

- Every transaction that takes place within each subledger is translated and summary level data is posted to the **general ledger** based on configured **subledger accounting rules**.

```
         Project Grants
         Management    ★

 Procurement          Receivables

Payables                  Fixed Assets

              General
              Ledger
```
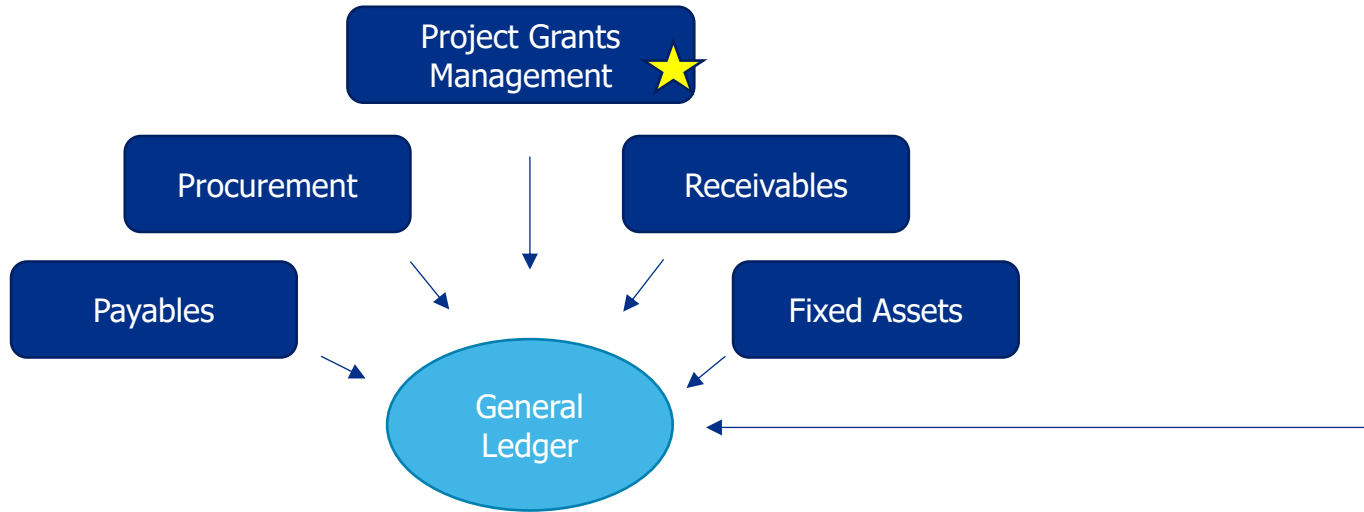
Oracle EPM

- Where budget planning and forecasting occurs, divided into key areas:

Workforce Planning	Financial Planning	Financial Reporting
Labor planning	Budget, revenue planning, non-personnel expense planning, forecasting	Analytics, visualizations, performance metrics
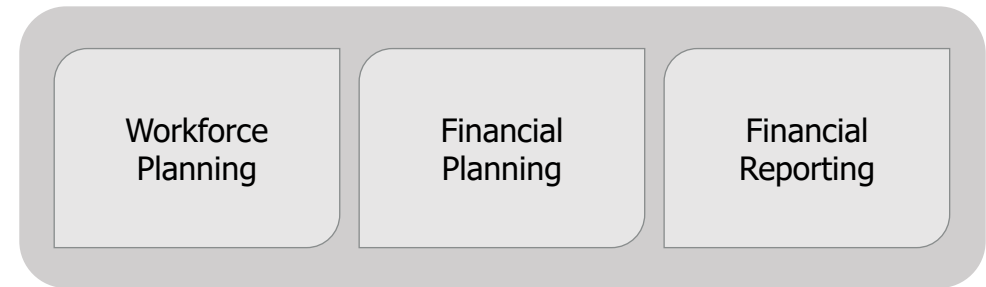
```
| Workforce   | Financial | Financial  |
| Planning    | Planning  | Reporting  |
```

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★ *The Project Grants Management **(PGM)** subledger is where budgeting for sponsored contracts, grants and capital projects occurs.*

Future State Brief Chart of Accounts

UofM will adopt a new Chart of Accounts to coincide with the launch of Oracle Cloud

- The Chart of Accounts, or COA, creates a common language to record all financial transactions in the General Ledger (GL), laying the foundation in Oracle Cloud

- Each segment in the COA has a distinct definition and purpose. When these segments are combined, the full chart string presents a complete picture of each financial transaction.

- All financial related entries must be recorded and reported using this new structure on **July 1, 2025**

COA BENEFITS

Meaningful, flexible, and real-time reporting to meet University needs

Categorized financial transactions and organized data

Serve as the common language for financial transactions

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[Chart of Accounts Readiness Session Recording](#)

Future State Brief: Chart of Accounts (COA)

Current State: FOAPAL

Fund	Org	Account	Program	Activity	Location

Future State: Chart of Accounts (COA)

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

Required on all transactions	Required for Expenses	As Needed

[Chart of Accounts Readiness Session Recording](#)

Notable differences with the new COA:

1. Entity segment is embedded within the future state chart of accounts

2. Activity values will have enhanced definitions providing increased user value and robust reporting

Future State Brief: Accounting Changes

In accounting, detailed financial transactions are recorded in **subledger modules.** The totals from the subledgers automatically upload to the general ledger to provide a summary that can be reported in financial statements.

Subledger	Description
Purchasing (or Procurement)	Internal and external purchases made by UofM.
Accounts Payable	Payments from UofM to internal or external suppliers.
Accounts Receivable	Sales transactions and payments received from external customers.
Project Grants Management	Sponsored and non-sponsored projects and grants.
Fixed Assets	Purchase, depreciation, valuation, and disposal records of capital equipment, and other long-term assets.

The foundation of all financial transactions is the Chart of Accounts.

General Ledger

Procurement   Payables   Receivables   Projects / Grants   Fixed Assets

Subledger modules accessed through Oracle

↔ To help track financial activities, some subledger modules interact with other subledger modules.

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October 2024 Town Hall Recording
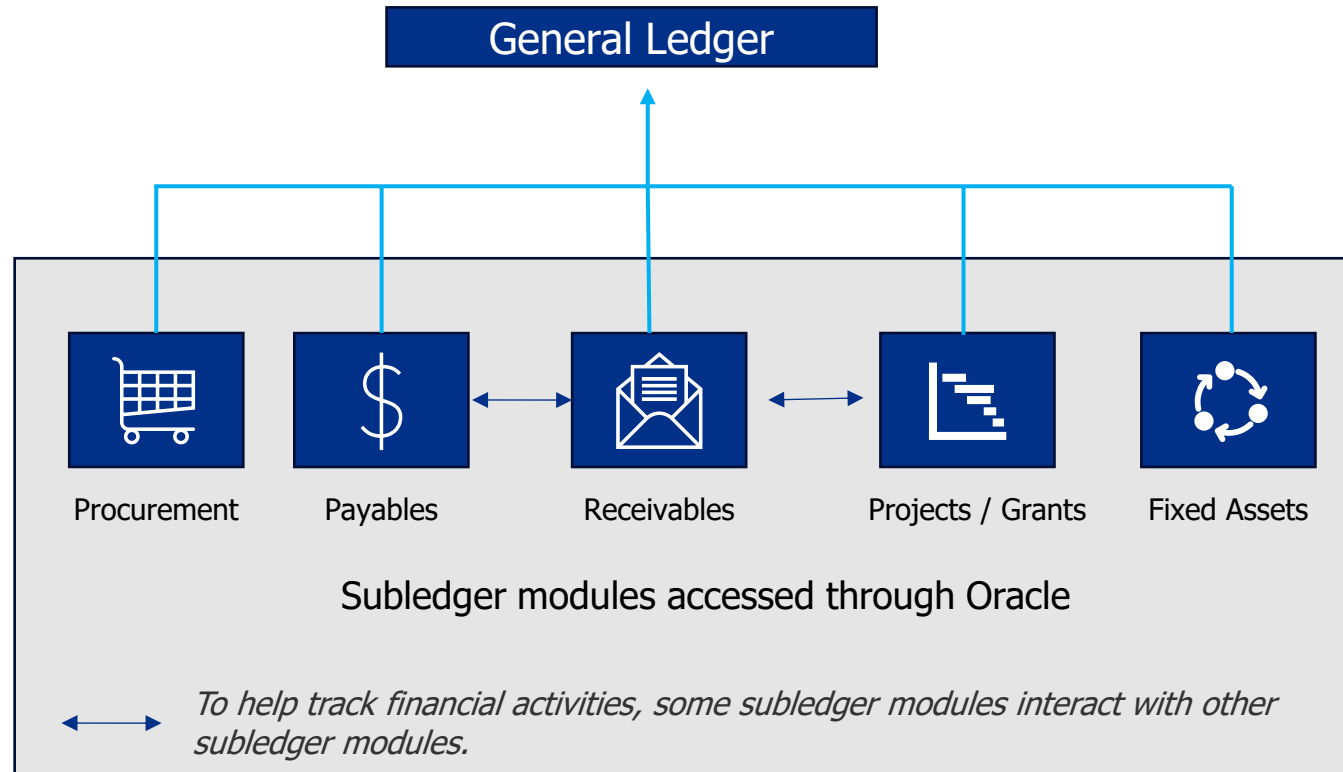
Future State Brief: Check Printing & Pay Cards

Key Changes:

Check printing will be outsourced.

➢ UofM will no longer print checks in house, First Horizon Bank will print checks.

There will be minimal impact on vendor checks and student refund checks.

Pay Cards.
Employees who do not set up direct deposit for payroll, or other reimbursements, will be paid using Pay Cards.

[October 2024 Town Hall Recording](#)

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Future State Brief: Online Journal Entries

Current State: Paper Transfer Vouchers
Future State: Online Journal Entries

- Replace paper process with online Journal Entries in Oracle.

- Workflow from Initiation to Final Approval

- Online routing with error checks for accuracy

- Includes the ability to attach documents

- Ability to easily review and see the reason for the entry

Example: The Chemistry dept bought binders from Staples and they forgot to change the COA information, and they need to go back and move the charges. This action will be completed through an online journal entry.

Future State Brief: OnBase

- Future documents will be maintained within Oracle, *everything within the same system!*

- Historical documents will continue to be stored in OnBase with Read-Only access for transactions occurring prior to 7/1/2025

- OnBase will still be used for Banner Student transaction documents

October 2024 FOFHR Meeting Recording
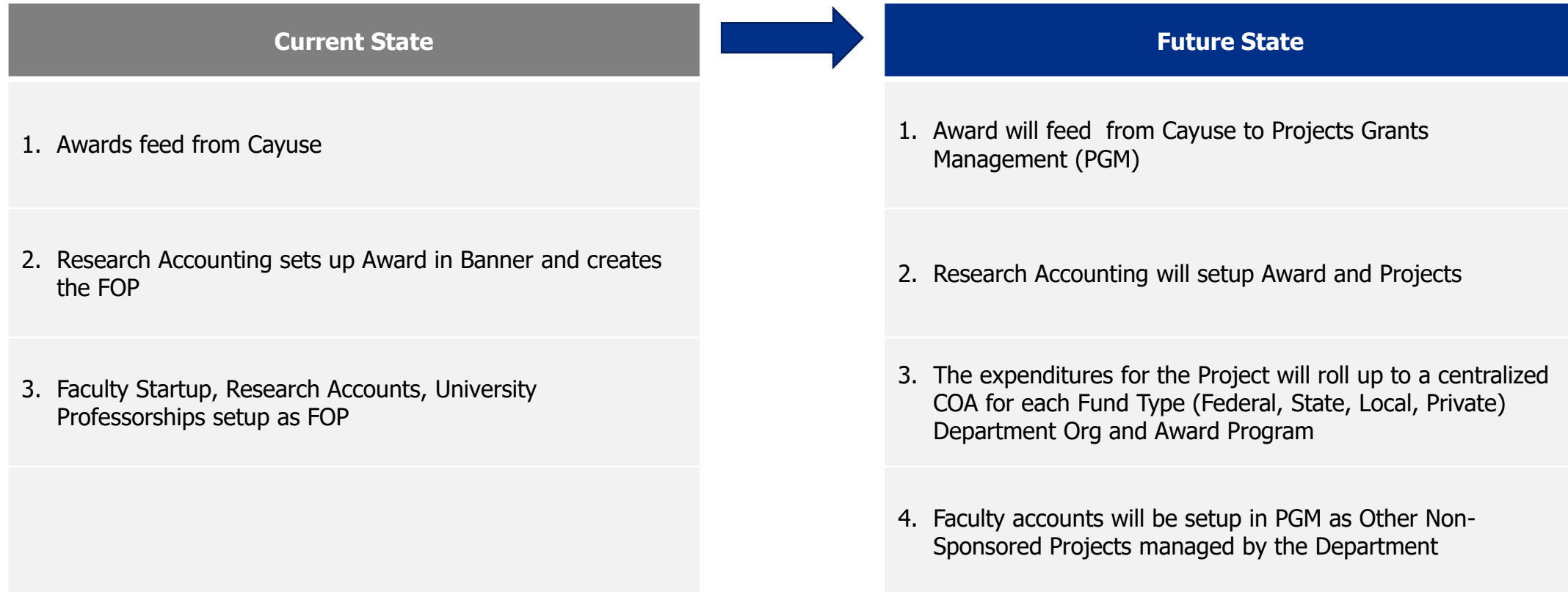
Future State Brief: Project & Grants Management

- The PGM subledger allows for the management of projects that are too complex to be managed by the General Ledger alone

- Typically, projects managed in PGM have a specified start date and end date that cross fiscal years and may have multiple funding sources

- **Sponsored Projects, Internally Funded Faculty Projects, and Capital Projects** will be managed within PGM

Terminology		What's Included		
Award	An agreement with sponsor that houses demographic and funding information	• *Demographics* ✓ *Sponsor, CFDA, terms & conditions Personnel*	• *Financial information* ✓ *F&A, Budget Periods*	• *Funding and Budget*
Project	Data element to track cost and revenue that facilitates reporting and cost control.	• *Track/segregate costs as needed.*	• *Implement cost restrictions.*	
Contract	Defines and controls the invoice and revenue generation.	• *Revenue Plan* ✓ *Define revenue method*	• *Bill Plan:* ✓ *Define Invoice method, Billing Terms*	• *Status* ✓ *(Active/ Closed*
Burden	Burden Cost is an overhead cost calculated by a rate assigned at the award or project level. It is Oracle's solution for handling F&A expense.			

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Future State Brief: Project & Grants Management

Award | Project Set-Up

Current State		Future State
1. Awards feed from Cayuse	→	1. Award will feed from Cayuse to Projects Grants Management (PGM)
2. Research Accounting sets up Award in Banner and creates the FOP		2. Research Accounting will setup Award and Projects
3. Faculty Startup, Research Accounts, University Professorships setup as FOP		3. The expenditures for the Project will roll up to a centralized COA for each Fund Type (Federal, State, Local, Private) Department Org and Award Program
		4. Faculty accounts will be setup in PGM as Other Non-Sponsored Projects managed by the Department

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May 2024 Town Hall Video Recording

Future State Brief: Budget Management & Financial Planning

Budget planning and forecasting tool that supports UofM budget process.

→ Budgets will be managed in a separate Oracle module called EPM.

→ All budget requests will be submitted through EPM.

→ Budget revisions in EPM will be in real-time

→ Approved budget moves from EPM to the General Ledger on a nightly basis for budgetary control of certain financial transactions

→ Ability to make base changes directly to the future budget year.

Oracle EPM System Sneak Peek Recording

Future State Brief: Travel Expenses

Oracle Expenses will replace Chrome River

Future State: New System, Same Process!

All employee expense reimbursement, travel reimbursement, and travel pre-approval will move to Oracle.	The travel pre-approval timeline, required information, process steps and required approvals **will be very similar.**

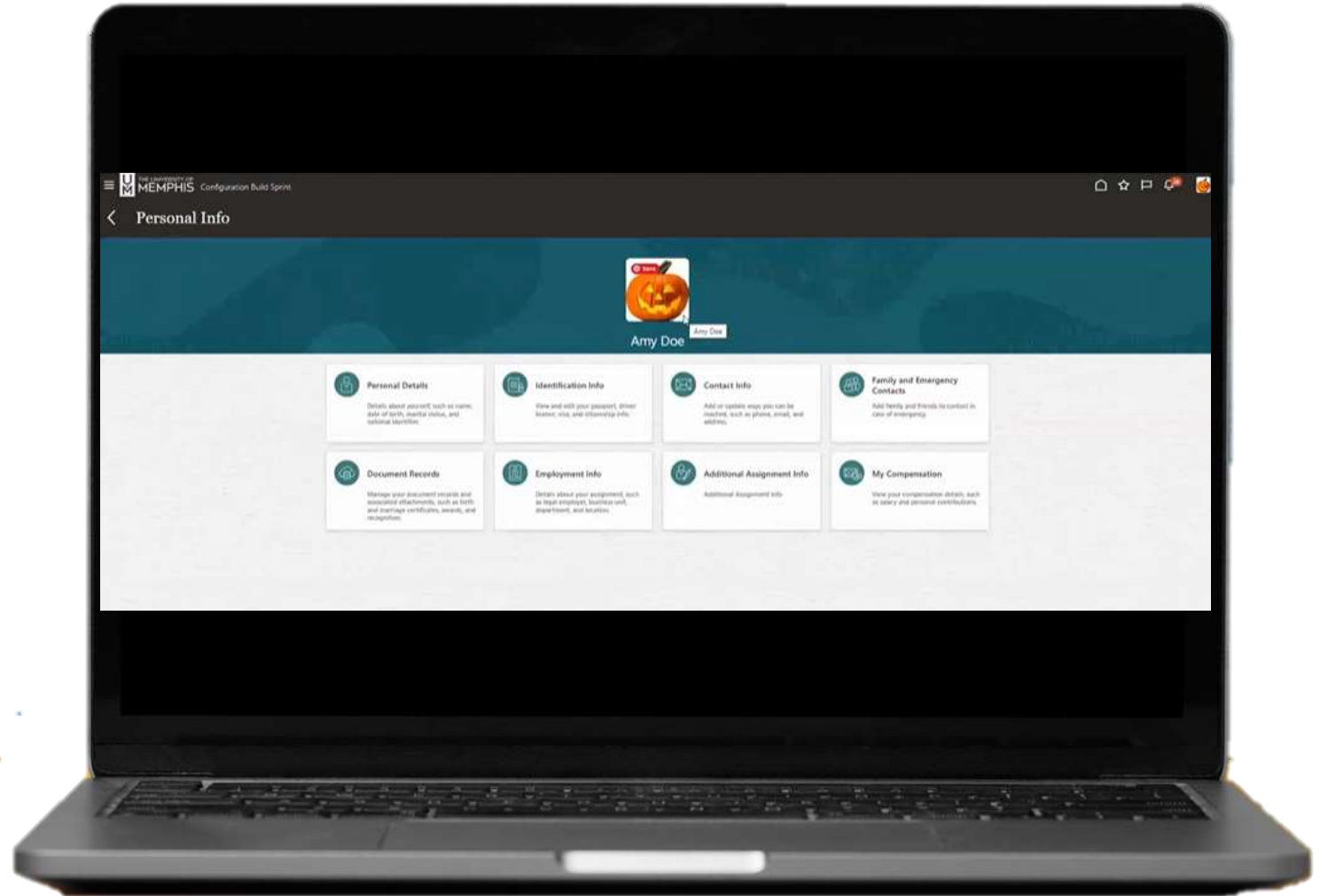You can watch the Travel Authorization submission and approval process on the SOAR Mediasite Channel. Click Here.

Future State Brief: Employee Self Service

SOAR Mediasite

Employee self-service functions will move to Oracle.

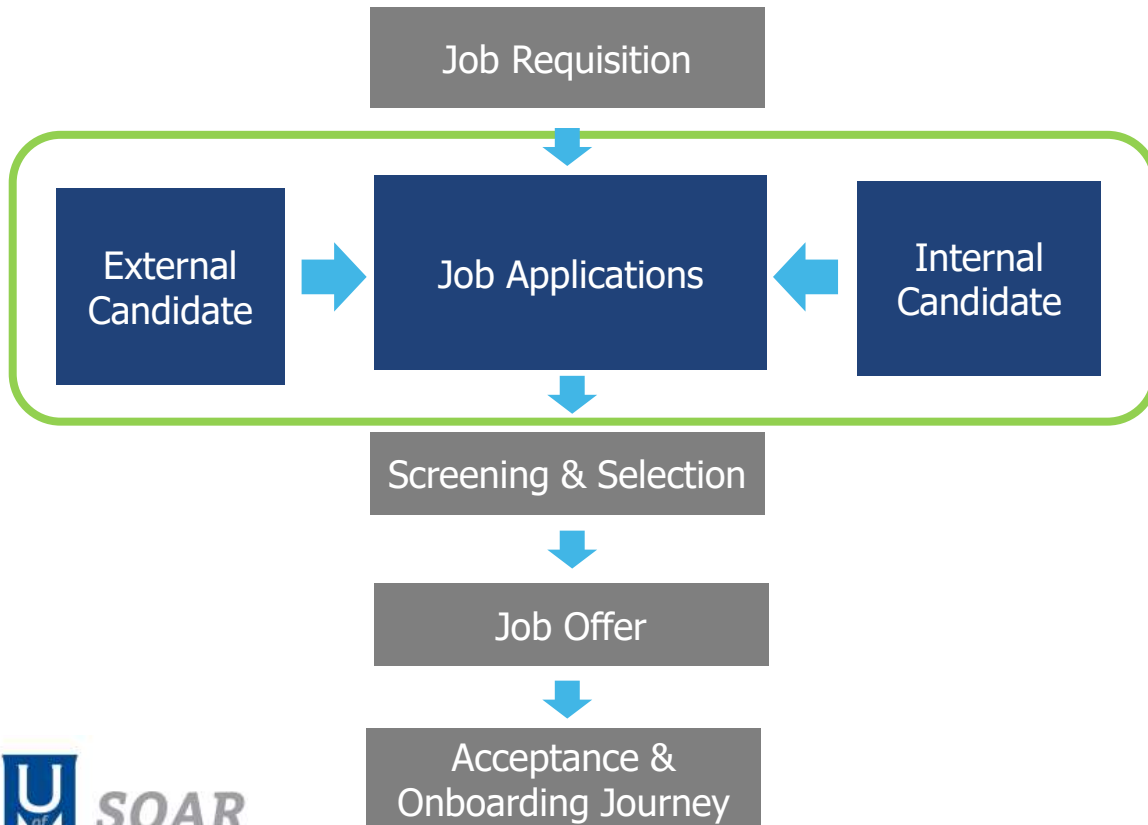Watch a system sneak peek on the SOAR Mediasite Channel.

October 2024 Town Hall Recording

Future State Brief: Oracle Recruitment

Job Boards: Internal and External

Oracle Recruiting Cloud

Job Requisition

↓

External Candidate → Job Applications ← Internal Candidate

↓

Screening & Selection

↓

Job Offer

↓

Acceptance & Onboarding Journey

Future State: Internal Job Board = Opportunity Marketplace & External Job Board

- UofM will host an internal job board exclusively for current employees, called Opportunity Marketplace
- A separate external facing job board will be maintained for non UofM employees.
- The internal job board streamlines the application process for internal employees applying for UofM jobs.

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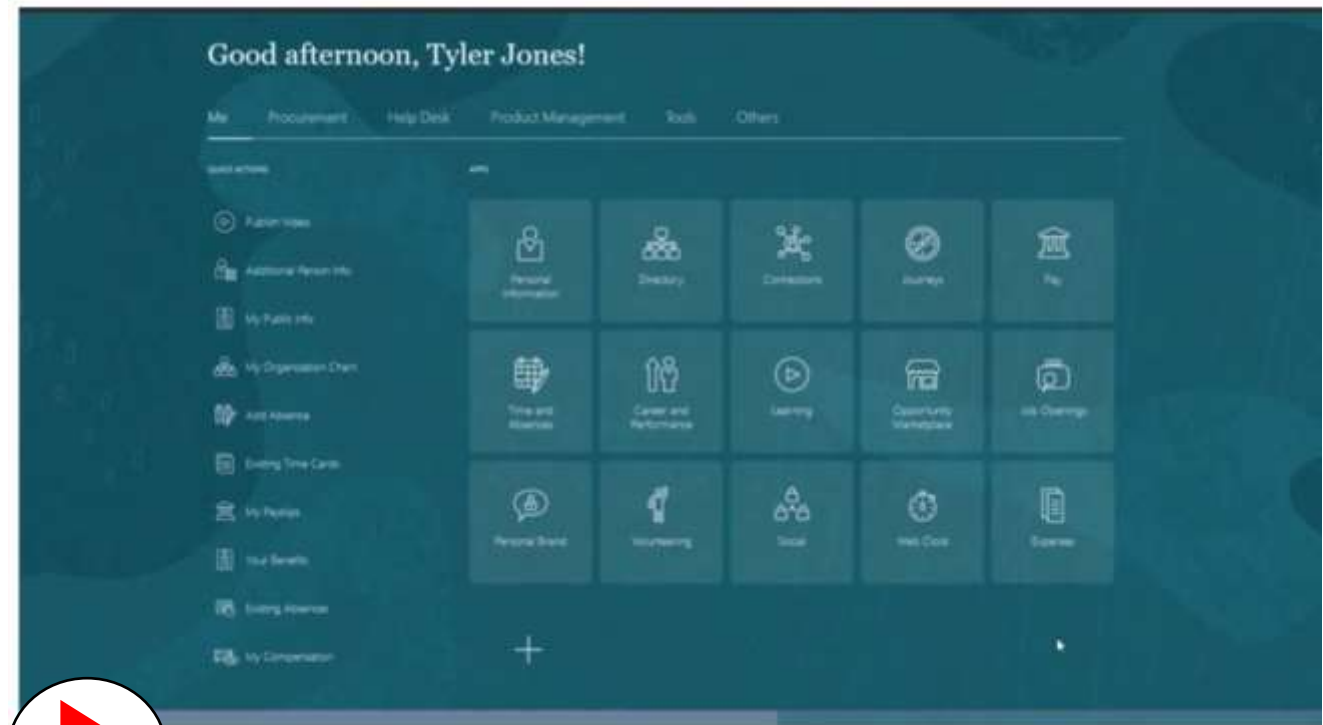
Future State Brief: Journeys

Key Concept: Journeys
➤ A journey is a collection of tasks to facilitate a business process
➤ Journeys will be leveraged for employees and managers to execute transactions as experiences with background information and checklists

- Within the employee journey dashboard, you will find a set of journeys that guide employees step-by-step as they transition through transactions/processes.

- In the future state, potential journeys may include onboarding, name change, or leave of absence.

[May 2024 Town Hall Video](#)

Future State Brief: Time & Absence

Leave Requests

All employees will need to input a leave request prior to absence.

➢ The employee's supervisor will receive the leave request and should take action to check the employee leave balance before approval.
➢ Employee will receive an email notification and in system notification with notification of approval or denial.

Time Entry

Time clocks will be replaced. New time clock will integrate with Oracle and autogenerate a timecard

Timecards must be submitted on a biweekly basis; non-exempt employees will continue to be paid biweekly.

To make corrections to a previously submitted timecard the employee will initiate the 'Change Time Request' process, make the correction, and then submit to their supervisor for approval.

➢ This correction will be reflected on the next payroll.

TIME & ABSENCE

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[October 2024 Town Hall Recording](#)

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BEST PRACTICES & STANDARDIZATION

COLLABORATION & TEAM SUPPORT

DATA & TRANSPARENCY

PROCESS ADOPTION

ON TIME & ON BUDGET

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SOAR Project Updates

SLIDES COMING FROM COLLEEN/SHUNDRA

Announcements & Deadlines

Danny Linton
Associate Director, 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

- New HR Employee
- Janel Tresvant,
  Facilitator, Employee Engagement, Learning & Development

Announcements & Deadlines

- Per the President's email sent last week, employees are expected to return to campus five days a week starting January 2, 2025.

- Any requests for exceptions need to be submitted via an [AWA form](#).

- More information is available on the [policy](#) and on this [website](#).

- Additional questions? Please speak with your supervisor.

Announcements & Deadlines

- As of November 15, **a federal judge has ruled to strike down** the FLSA overtime final rule that would increase the salary thresholds required for employees to be exempt from overtime.

- If you recall, the U.S. Department of Labor (DOL) issued the final rule to alter the overtime pay regulations under the Fair Labor Standards ACT (FLSA) in April 2024. These changes were to be implemented in two phases.

- Phase I, which went into effect July 1, 2024, included an increase to the salary exemption threshold to an annual salary of $43,888 and Phase II which was to take effect Jan. 1, 2025 increasing salary exemption threshold to an annual salary of $58,656.

- In order to remain compliant with the ruling, the university implemented the Phase I changes back in July and have been preparing to make recommendations for changes for the next phase. With the overturning of the ruling, no further actions will be required.

- Key Points to Note:

  - Exempt Salary Threshold: The minimum salary requirement to remain exempt from overtime eligibility is $35,568 per year.

  - Impact on the Previous Phase I: Employees who were increased to the Phase I threshold will continue to earn his/her current salary. **The University will not reverse the salary adjustments.**

  - Impact on Future Increases: While it is unclear today, there may be future changes to the minimum salary threshold under the new administration. The university will continue to assess and review as more information is provided.

  - Please reach out to your Senior HR Business Partner with any questions or concerns.

Announcements & Deadlines

- The deadline for submission of graduate assistantship contracts for Spring 2025 is **December 23, 2024.**

- When graduate contracts are late, student accounts are not adjusted, and students appear on the drop for non-payment list. Late contracts cause a considerable amount of work for staff, cause undue stress on our student employees, and delay access to health insurance for FTGAs. Although the graduate school realizes that there will be an occasional late contract, exceptions to the contract deadline should not be the norm.

- To encourage timely submission of graduate contracts, the Graduate School is instituting a GA contract late fee of $200. This has been approved by the Provost and CFO.

Announcements & Deadlines

- Effective January 2025, the State of Tennessee's deferral limit to the 401(K), 457 and 403(B) for participants less than the age of 50 will increase from $23,000 to $23,500. There are currently no changes to those age 50 and over with those maximum contributions remaining at $30,500 for the 401(k), 457 and 403(B). Visit memphis.edu/hr/tda.php for detailed plan descriptions below.

- Visit participant.empower-retirement.com/participant/#/login to update.

Announcements & Deadlines

Congratulations to the recipients of the 7th Annual Excellence Awards!

- Presidential Award
    - Amanda Rodino, Disability Resources for Students

- First Horizon Excellence Awards
    - Hilary DeLuco, Academic Affairs
    - Kelly Freeman, ITS
    - Angela Jarvis, Advancement
    - Danny Linton, Business & Finance
    - Ceecy Reed, President's Units
    - Brendan Dwyer, Athletics
    - Kayla Hubbard, Enrollment Management
    - Victoria Jones, Student Affairs
    - Vickie Middleton, Research & Innovation
    - Trent Shadid, Marketing & Communications

- TIAA Community Outreach Excellence Award
    - Kelsey Ryan, University Middle School

- Missed the ceremony? You may watch the recording online here.

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 early December, there should be no lapse in system access for these employees.

• Questions? hrbp@memphis.edu

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 skill development opportunities available!
- You can connect your personal LinkedIn account to share what you've learned.
- In the MyMemphis portal select Employee, then select Training Opportunities, then use your SSO to log in.

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 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 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

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.

Announcements & Deadlines

Next Training for "Effective Search Committees":

- December 12, 2024, 10am
- 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

LET'S PARTY!

- **Happy Hall-idays with Human Resources**

    December 10, 2024, Time TBA
    Administration Building 1st Floor Hallway

- President's Holiday Party (Faculty): December 5, 11:30am-1pm

- President's Holiday Party (Staff): December 6, 11:30am-1pm

- Last Workday of 2024: Monday, December 23
- First Workday of 2025: Thursday, January 2

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!

- Subscribe to our WorkforUM X (formerly Twitter) feed at @umemphisjobs!

- Follow us on Instagram! @uofmhr

HR'S HALLOWEEN 2024 FESTIVITIES WERE SCARY GOOD!

Thank you for attending!

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