

Finance & HR Update

October 10, 2019



Agenda

- **Finance**
 - Financial Affairs Support Team
 - New IDT Process
 - Beta Reports
- **HCM**
 - Payroll Tips & Tricks
 - Benefited Termination Timing
 - Temp Lecturers



UNIVERSITY
OF WYOMING

Financial Affairs
Support Team

Our Website

www.uwyo.edu/FAST

STUDENTS | PARENTS | ALUMNI | PEOPLE | WYOWEB | VIRTUAL TOUR | GIVE | EVENTS

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NAVIGATION

APPLY NOW

FINANCIAL AFFAIRS SUPPORT TEAM

The Financial Affairs Support Team (FAST), located in Old Main 113, is available to provide a wide range of no-cost business services and support to all University departments on an on-call, short- or long-term basis.

Our team is comprised of both experienced financial analysts and student interns trained in the University's financial and reporting systems. We offer support at every level, from answering quick how-to's, providing a helpful hand during crunch times or staff vacancies, conducting brief or in-depth trainings, or assisting with the design and delivery of more complex, long-term projects.

For a detailed description of some of our services, please click on "Our Services" below.

To schedule, simply click on the "Request Form" button to the right, or feel free to call, email, or stop by our office anytime. We will respond to your request as FAST as possible!

REQUEST FORM

OUR SERVICES

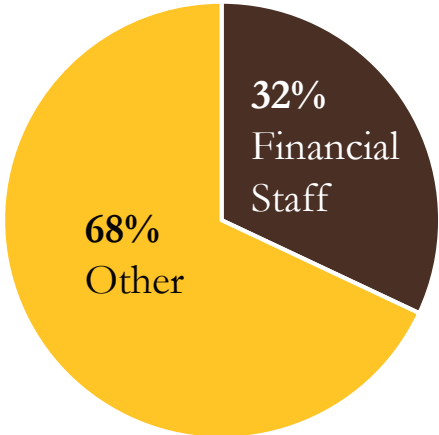
BUSINESS
STUDENT INTERNSHIPS

Estimated Needs Analysis

A range of positions typically assume varying levels of financial responsibility. These include:

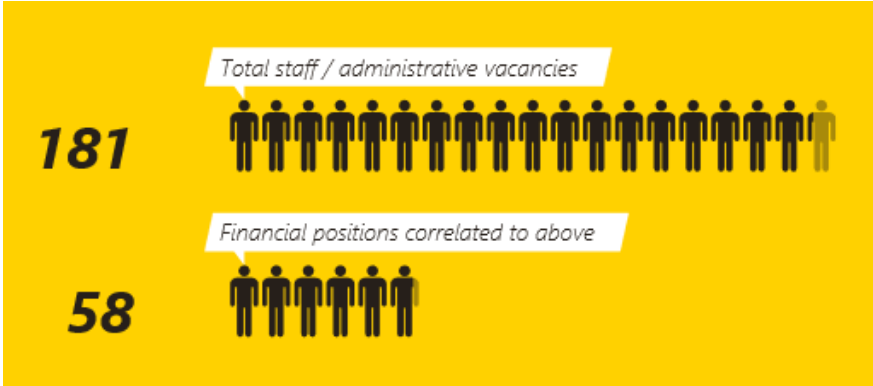
- **Administrative / Office Assistants**
- **Coordinators**
- **Accounting Associates**
- **Accountants**
- **Assistant Managers**
- **Business Managers**

Total Non-Academic Positions



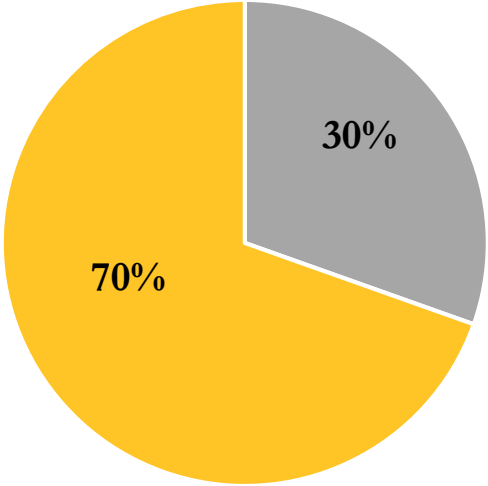
*OIA

FY19 Staff / Administrative Vacancies



*Budget Office

Spring 2019 Vacancies



■ Financial staff ■ All other staff

*HCM

Our Services

On-Campus Business Support



We can provide in-person, short- or long-term financial service support during:

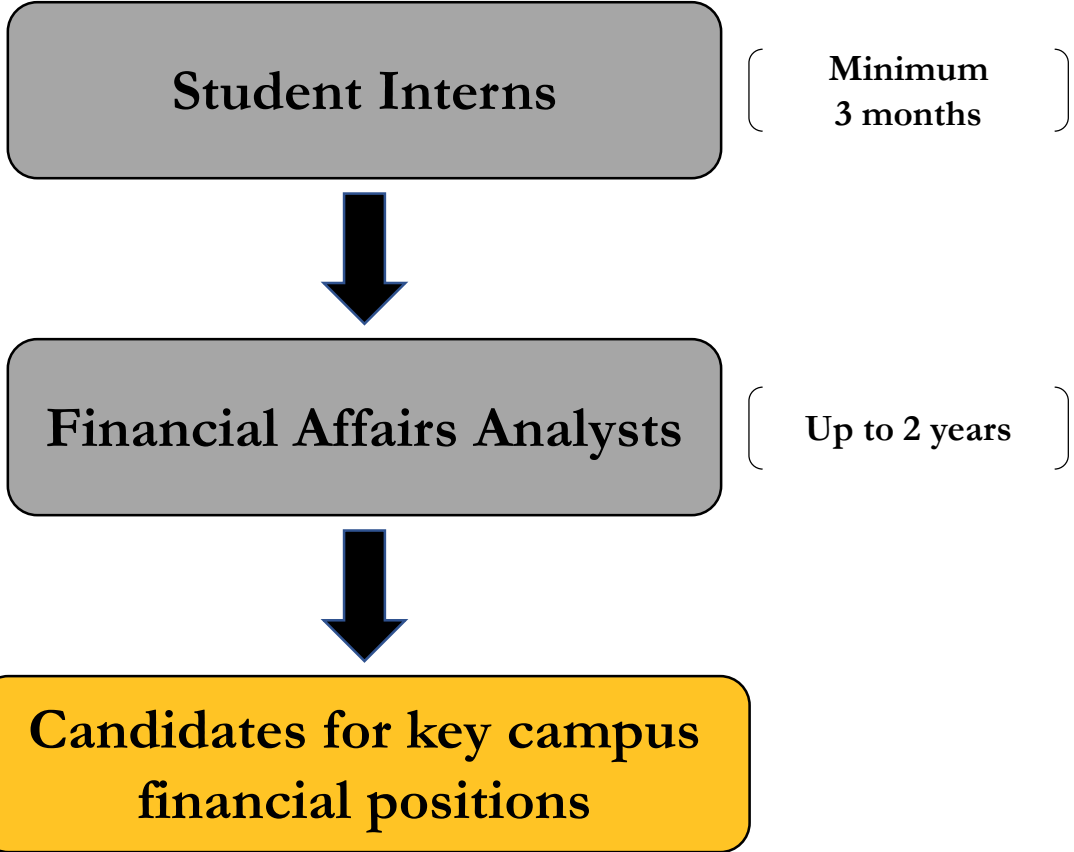
- Temporary staff vacancies (e.g. retirement, vacation, extended leave)
- High-volume crunch times (fiscal year-end, audit season, budgets due)

At your own pace, we can provide personalized hands-on training on commonly used financial reporting tools.

Need more specific help in the following areas?

- Coding (Chart of Accounts or POET)
- Requisitions, POs, and Receipting
- Expense Reports
- WyoCloud Financial Management
- Expenditure Corrections
- Contracts
- Assistance with phasing-out shadow systems
- Analyzing efficiencies and providing possible alternatives

Financial Affairs Support Team Career Ladder



Requesting Our Services

UW Home

🏠 FINANCIAL AFFAIRS SUPPORT TEAM: HOME

MENU

- [OUR SERVICES](#)
- [OUR TEAM](#)
- [STUDENT INTERNSHIPS](#)
- [REQUEST FORM](#)

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Our Team



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Drop by: Old Main 113

Visit our website at: www.uwyo.edu/fast



Revenue Departments Involved in New Process

- Union
- Catering
- Residence Life
- Dining
- Transit & Parking
- Copy & Print Center
- UW Operations
- Facilities
- Shipping & Receiving
- Safety
- Surplus

Goal of Pilot Process

Increase the timeliness of posting IDTs to the GL so financial reports reflect these expenditures

IDT Process Pilot Group

- When the employee/department requests a good/service, the **revenue** department will ask for expense account information at the time of request.
 - If no account information is provided when the order is placed, a default account string on file for the department will be used.
 - To update the default account string on file, contact the revenue department directly.
- It is recommended that employees who request goods/services acquire account information prior to making the request from their internal budget manager.
- Revenue department will send a copy of the invoice **via email** denoting the account information to the employee and/or billing coordinator requesting the service **as well as** the **Cost Center Approver** for each department.

IDT Process Pilot Group

- Department business staff will receive the bills, generally the same as they do now and given the opportunity to provide changes to the coding **before** the IDT is submitted to accounting, provided they respond with those changes by the given deadlines.
- If no there is no request to change the default chart string, the default chart string will be used.
- **Communicate** with the revenue department for expected delays, questions, etc.!


IDT Process Pilot Group

- Revenue department will work with accounting on a regular basis to upload the journals in a more frequent timeframe. *Goal = weekly*
- Expenditure corrections for any IDT must be completed by the expense department.
- The IDT_Accounting@uwyo.edu email will continue to be used for other revenue departments not in the pilot group.

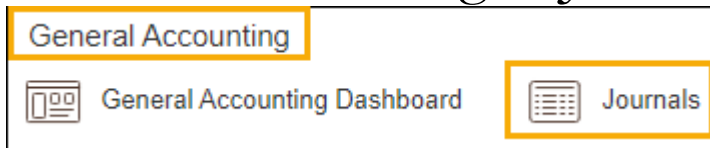
IDT Process Pilot Group

- All invoices will continue to be available within a large attachment on the IDT journal in WyoCloud.

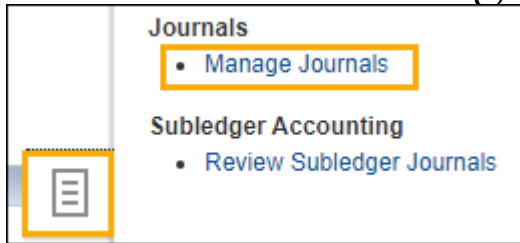
- To find the IDT journal in WyoCloud:

- Click on the Navigator 

- General Accounting > Journals



- Task Menu > Manage Journals



- Enter the IDT Number in the Journal field

Beta Reports



Transactional Reporting Table of Contents

This dashboard serves as the table of contents for all key transactional reports for campus users.

General Ledger and Budgetary Control

[Budget by Account](#)
[General Ledger Balances](#)
[Transactions by Period](#)
[Payroll Expenditures without Fringe](#)

Procurement and Accounts Payable

[Purchase Order Header Status](#)
[Purchase Order Line Status](#)
[Purchase Requisition Header Status](#)
[Purchase Requisition Line Status](#)
[Invoice Status Report](#)

Project Portfolio Management

[Grants Budget to Actual Summary](#)
[Grants Budget to Actual Detail](#)
[Project Financial Summary](#)
[Project Expenditure Summary](#)
[Project Expenditure Details](#)
[Project Committed Cost Details](#)

Expenses and P-Card

[P-Card Transactions](#)
[Outstanding P-Card Transactions](#)
[Expense Report Information](#)

Beta Reports

These reports are currently in development. Please review them and provide comments by submitting a help desk ticket. When the reports have been finalized, they will be moved out of the Beta section. Please do not consider these reports final when they are in the Beta section.

[Payroll Costing](#)

Time / Absence / Payroll FAQs

All time/absences and payroll QRGs have been moved to a new subcategory under HCM > Employee in the WyoCloud Knowledge Base.


PLUS: In order to provide easier access to previously communicated Time / Absence Entry and Payroll related tips and tricks, we have created a new FAQ page.


[Knowledge Base](#) / [WyoCloud](#) / [Human Capital Management \(HCM\)](#) / [Employee](#)


Employee


Guides on how to manage your employee account such as updating your address, adding an emergency contact or skills and qualifications.


Categories (3)

 **Goals**
Guides on setting up and managing your personal goals.

 **Performance Evaluations**
Guides on completing your performance evaluation.

 **Time / Absences Entry & Payroll Guides**
All guides pertaining to time, absence (leave) entry as well as payroll (direct deposit...)

NEW! 


Articles (13) 

[Knowledge Base](#) / [WyoCloud](#) / [Human Capital Management \(HCM\)](#) / [Employee](#) / [Time / Absences Entry & Payroll Guides](#)

\$ Time / Absences Entry & Payroll Guides

All guides pertaining to time, absence (leave) entry as well as payroll (direct deposit, payslips, W-4).

Articles (4)

 [Frequently Asked Questions](#)

[Adding/Editing Payment Methods for Payroll](#)
This guide will cover how to add additional payment methods or edit existing payment methods for payroll/paychecks.

[Entering Time in HCM](#)
Entering time on the Time Card.

Termination Tips

Benefited Employees Terming, Rehired Non-Benefited, Same Department

Important: Transaction steps along with approvals, that are needed prior to processing the termination in HCM.

*If employee has direct reports, change them to their new manager asap.
The exiting employee or the DHR can initiate this change.*

- If a terminal leave position number is needed, complete the Position Initiation & Modification Form asap. This requires Dean or Director, and Budget Office signatures. Send the approved form to Human Resources and Class/Comp will create the terminal leave position number, transfer the employee to that position number and notify the department when the process is complete.
- If employee is being rehired into a non-benefited position, create a requisition for the non-benefited hire. QRG's are on the knowledge base, or contact your HR Staffing Partner if you have questions.

*Once these steps are submitted **and approved**, proceed with submitting the exiting employee's termination transaction.*

Termination Tips

Non-Benefited Employees Transferring to a Benefited Position

- Benefited assignment to be added by the Records department first.
- The non-benefited position will need to be ended at the end of a pay cycle.
- Ideally this will occur and dated after the benefited assignment begins, so there is no break in service.

Hourly non-benefited end assignments and terminations

- Remember to use the end date that reflects the end of the payroll time period on all hourly employees.
- End of month for GAs, Temporary Lecturers and Salaried Non-Benefited employees rule still applies.

UW PAYROLL DEADLINES - FISCAL YEAR 2019-2020

Hourly Bi-Weekly Payroll

Please note – dates in Red are adjusted due to Holidays

HCM					
Payroll Transactions*	Time Period Start	Time Period End	Time Entered ^	Time Approved ^	Pay Day
6/14/2019	6/16/2019	6/29/2019	7/2/2019	7/3/2019	7/10/2019
6/28/2019	6/30/2019	7/13/2019	7/16/2019	7/17/2019	7/24/2019
7/12/2019	7/14/2019	7/27/2019	7/30/2019	7/31/2019	8/7/2019
7/26/2019	7/28/2019	8/10/2019	8/13/2019	8/14/2019	8/21/2019
8/9/2019	8/11/2019	8/24/2019	8/27/2019	8/28/2019	9/4/2019
8/23/2019	8/25/2019	9/7/2019	9/10/2019	9/11/2019	9/18/2019
9/6/2019	9/8/2019	9/21/2019	9/24/2019	9/25/2019	10/2/2019
9/20/2019	9/22/2019	10/5/2019	10/8/2019	10/9/2019	10/16/2019
10/4/2019	10/6/2019	10/19/2019	10/22/2019	10/23/2019	10/30/2019
10/18/2019	10/20/2019	11/2/2019	11/5/2019	11/6/2019	11/13/2019
11/1/2019	11/3/2019	11/16/2019	11/19/2019	11/20/2019	11/27/2019

The full list of upcoming payroll related deadlines can be always be found on the [Payroll website](#).

Temporary Lecturers – Process Update

