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Welcome to BYU Financial Services! This booklet is intended to help you get set up and settled in, and we hope that you will use it as a reference along with the welcome.byu.edu website. An online version can be found at finserve.byu.edu/new_full-time_employee and you can use the links in that version. (Hold down Cntrl while you click the link to open in a new tab.) Please work with your peer mentor and supervisor as you complete the new employee checklist. They can also explain other items in the booklet. You are welcome to contact Lynette Cummings and her student employees with questions too.

**Contact Info:**
Lynette Cummings
Administrative Assistant, Financial Services
Email: lynette_cummings@byu.edu
Office: A-153 ASB
Phone #: 2-3662

Lynette’s Student Employees
Email: financialservices@byu.edu
Office: A-153 ASB
Phone #: 2-4701

Watch the welcome to Financial Services video [here](#).

**Your Peer Mentor is:**

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MISSION: We promote and protect the economic interests of all BYU stakeholders.

VISION: To be trusted partners who empower wise financial decisions and stewardship of sacred resources.

VALUES CRITERIA: Competency
- Respect and Belonging for All Individuals
- Integrity
- Teamwork
- Exceeding Customer Expectations
- Responsible Use of Sacred Resources
- Innovation
- Accountability and Results
BYU Mission Statement

Mission of the University

The mission of Brigham Young University – founded, supported, and guided by The Church of Jesus Christ of Latter-day Saints – is to assist individuals in their quest for perfection and eternal life. That assistance should provide a period of intensive learning in a stimulating setting where a commitment to excellence is expected and the full realization of human potential is pursued.

Aims of a BYU Education

BYU seeks to develop students of faith, intellect, and character who have the skills and the desire to continue learning and to serve others throughout their lives. These are the common aims of all education at BYU. Both those who teach in the classroom and those who direct activities outside the classroom are responsible for contributing to this complete educational vision. A BYU education should be:

- Spiritually Strengthening
- Intellectually Enlarging
- Character Building
- Leading to Lifelong Learning and Service

For more information go to aims.byu.edu
New Employee Checklist

Welcome Page
Go to welcome.byu.edu and complete any steps on the “Before You Start” tab. Then move on to the “First Day” tab and review items found there.

Sometime this week, look through the information on the “First Week” tab. Complete the required trainings and recommended trainings, read the university policies, obtain your BYU ID card, and sign up for payroll deduction for Cougar Cash if interested (they give you a free lunch at the Cannon Center for signing up).

Contact Info
Update your contact information on My BYU.
• Update work and personal information by going to Campus Links/Communication/Personal Information/Contact Info
• In order for your work address and phone number to be listed in the campus directory they need to be entered on your contact info on My BYU

HR Website
Go to hrs.byu.edu for information about DMBA, financial planning, university wellness activities and much more.

Then click on “Current Employee” to find a lot more useful information about training & development, paid holidays, employment verification, maternity & paternity leave, etc.

Direct Deposit and Form W-4
All employees are required to set up direct deposit for their paychecks. Please click here to do that. Click here to adjust your W4 information.

Additional information about payroll can be found at https://finserve.byu.edu/payroll.

Tech Items
Go to oit.byu.edu/employees for information on the following:
• Setting up Duo
• Connecting to WiFi
• Security software
• Available computer software
• Email filter
• Password resets
• And much, much more...

ID Card Tips
• New employees will be able to get an ID card one day after all hiring processes are completed by the employment and compensation offices. (HR often has new employees come to get an ID card right after submitting the I-9 or other paperwork and they are not able to make them an ID card. It takes an overnight update after all hiring processes are completed for the person to be an “employee” in our system.)
• The HR Office prefers that new employees submit their ID card photo online at idcenter.byu.edu/photo.
• Eligible family members of new employees should be able to get an ID card one week after the employee has given the family member’s social security number to DMBA. However, the employee should always check their listed family relationships online at myaccount.byu.edu before bringing the family to campus to get ID cards.
Computer Set Up
- Click [here](#) to order email
- Manage email alias at [alias.byu.edu](http://alias.byu.edu)
- Have Crash Plan set up on your computer to back it up
- Get access to printers

For computer help contact the CSRs at 2-7890 or OIT at 2-4000.

Computer Access
(You may not need access to all of these systems, and you may need access specific to your area that is not listed on the general list below. Discuss this with your supervisor and use the lines below to add additional access you will need.)

- Box – Contact the director over your area for access
- Peoplesoft Financials (read only) – Email [lynette_cummings@byu.edu](mailto:lynette_cummings@byu.edu)
- Update the manager/contact information for Peoplesoft operating units & depts if applicable
- Student Financials – Email [lynette_cummings@byu.edu](mailto:lynette_cummings@byu.edu) (name, dept., net ID, access needed)
- HR Peoplesoft – Email [lynette_cummings@byu.edu](mailto:lynette_cummings@byu.edu) (name, dept., net ID, access needed)
- Business Objects – email [rebecca_harrison@byu.edu](mailto:rebecca_harrison@byu.edu) with new employee’s name, net ID, department, and the name of the person they are replacing along with their net ID
- Chrome River, Fast Track, Y-Markplace – Training is located [here](#)
- Transact – click [here](#) for the application
- AIM (Registrar’s Office) – [enrollment.byu.edu/registrar/aim-access](http://enrollment.byu.edu/registrar/aim-access)
- _______________________________________
- _______________________________________

In order to get access to student information you will need to complete the FERPA training. This training can be found at [ferpa.byu.edu](http://ferpa.byu.edu).

Building Access
Email [katy_clark@byu.edu](mailto:katy_clark@byu.edu) with your netID to request building access (request after hours door access, micro market access, conference room access for C-249 and A-203 and third floor elevator access)

Organize Desk
- Contact Lynette to discuss any ergonomic issues with your workspace
- Contact the custodians at 2-4840 for any cleaning needs

Most office supplies can be found in the supply cupboards in A-153 ASB. There is also a copy room in D-227 ASB where you get paper. If you can’t find what you need, Lynette or her student employees can order it or give you direction on how to use the division p-card or campus card.

Stationery
Click [here](#) or email [financialservices@byu.edu](mailto:financialservices@byu.edu) for help ordering the following:

- Business Cards
- Letterhead – You can get Financial Services letterhead from Lynette or her student employees
- Go to [brand.byu.edu](http://brand.byu.edu) for information on the BYU brand and logos.
Financial Services Orientation

Lynette Cummings will contact you to schedule a Financial Services orientation where you will go over the following items. Feel free to bring any questions you may have to this meeting.

1. Review new employee handbook
2. Schedule a one-on-one meeting with Alan Moose & director
3. Join a Financial Services council
4. Verify building access and office keys
5. Introduction to Ring Central / order phone device if needed
6. How to schedule rooms
7. Outlook training (if needed)
8. Division & controller group meetings
9. Order a division shirt
10. Lunch room options
11. Q&A

Lynette and her student employees will do the following:
- Order a nameplate
- Add you to the FS division email list
- Add your name and office to the mail delivery information
- Add you to the division phone list and birthday list
- Add you to the division newsletter distribution list
- Update the FS website if necessary
- Add you to the OPAC email list
- Add you to the controller group email list (and council email list if appropriate)
- Update liaisons/university accountants contact lists if needed
- Update liaisons on the compliance report if needed

Division Shirt

Look at the links below and choose a division shirt before the FS Orientation Meeting.

Women's Shirts:
- Style A
- Style B
- Style C

Men's Shirts:
- Style A
- Style B
- Style C
Financial Services Councils

Financial Services has set up councils to encourage employee engagement and development. Employees are encouraged to participate. You can choose which council you want to join and let Lynette know in your Financial Services orientation meeting. Go to finserve.byu.edu/FS_Councils to see a list of who is currently serving on each council.

Professional Development Council: Work to: (1) define learning objectives for our people that will promote career education and development, (2) identify training opportunities on and off campus that support program objectives, and (3) track and report training accomplishments.

Annual Activities Council: Plans and manages the FS annual retreat, making sure the development and engagement objectives of the other councils are supported, and plans the annual FS Christmas party.

Employee Engagement Council: Plans and promotes activities and events to foster FS personnel engagement. These activities include, but are not limited to the following: Monthly tours of other campus units and venues/Wellness activities/“Get up and walk” breaks/pot luck meals, etc.

Communication Council (Newsletter): Plans and prepares the publication of the periodic FS newsletter – The Ledger. Members plan editions, prepare content and encourage others to contribute.

Communication Council (Division Meetings): Plans the timing and content of periodic department meetings. Identifies topics and presenters, plans refreshments and encourages attendance.

You will begin receiving monthly department newsletters created by the Newsletter Council. We encourage you to read them so you can get to know your fellow employees better.

Also...

Employees are encouraged to be engaged and participate in the annual retreat, engagement activities, department meetings and Christmas party organized by the other councils. We understand that it might not be possible to attend all activities, but try to attend when possible. The annual retreat and department meetings are not optional unless you have extenuating circumstances.
# Dress Code

## Business Casual Attire

Traditional business attire may be more appropriate for certain meetings or conferences, whether on or off campus. Always be sensitive to the dress standards of others with whom you meet and dress accordingly. Those who prefer to continue to wear traditional business attire at all times are welcome to do so. Supervisors are responsible for determining whether their employees are appropriately dressed for their work environment and position duties. BYU-branded attire and colors are encouraged.

Although this dress standard is less formal than traditional business attire, employees’ clothing must be in good taste and positively reflect the university’s image. Always maintain a clean, modest, and groomed professional look. Below are some guidelines to help describe what is considered appropriate business casual attire. Keep in mind the "business" part of business casual.

### Men

<table>
<thead>
<tr>
<th>Shirts:</th>
<th>clean, neatly-pressed collared shirts; golf shirts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inappropriate shirts:</td>
<td>no-collared shirts, sweatshirts, T-shirts</td>
</tr>
<tr>
<td>Slacks:</td>
<td>clean, neatly-pressed khakis, dress pants or slacks</td>
</tr>
<tr>
<td>Inappropriate slacks:</td>
<td>wrinkly, worn or tattered pants; blue jeans</td>
</tr>
<tr>
<td>Shoes:</td>
<td>loafers or dress shoes</td>
</tr>
<tr>
<td>Inappropriate shoes:</td>
<td>flip-flops, athletic shoes, sandals</td>
</tr>
</tbody>
</table>

### Women

<table>
<thead>
<tr>
<th>Shirts:</th>
<th>clean, neatly-pressed shirts, blouses or sweaters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inappropriate Shirts:</td>
<td>sweatshirts, T-shirts, tight or revealing shirts or shirts with holes</td>
</tr>
<tr>
<td>Slacks:</td>
<td>clean, neatly-pressed dress pants or slacks</td>
</tr>
<tr>
<td>Inappropriate Slacks:</td>
<td>wrinkly, worn or tattered pants; blue jeans</td>
</tr>
<tr>
<td>Dresses and Skirts:</td>
<td>clean, neatly-pressed casual dresses and skirts</td>
</tr>
<tr>
<td>Inappropriate Dresses and Skirts:</td>
<td>Anything above the knee</td>
</tr>
<tr>
<td>Shoes:</td>
<td>dressy sandals or dress shoes</td>
</tr>
<tr>
<td>Inappropriate Shoes:</td>
<td>flip-flops, athletic shoes</td>
</tr>
</tbody>
</table>
Employee Benefits & Discounts

Some of the many benefits BYU employees can receive are listed below. Click on the links below to see more of the benefits you are eligible to receive.

- Tuition benefits
- UTA Pass
- Use of the BYU library
- Use of athletic facilities
- Educational pricing on computers, tablets, watches & more at the BYU Store
- Discounts at locations on and off campus
- 25% off Provo Rec Center Membership
- 20% off Orem Rec Center Membership
- Use of Simply Travel through the BYU Travel Office

Go to the following web sites to see more perks available to you:
byudiscounts.byu.edu
hrs.byu.edu/byu-campus-benefits

Other opportunities...

**Cell Phone Plan**
As a current employee, retiree or surviving spouse you are eligible to participate in BYU’s corporate cell phone plan. Family members or friends can be added to the account as well, with the person directly associated with BYU acting as the plan manager. Please contact the BYU Cell Phone Office with any additional questions at (801) 422-7311 or cellular@byu.edu.
byucellphones.byu.edu

**Education Week**
Financial Services pays for full-time employees to attend Education Week. You will receive an email in July asking if you would like to attend and registration is taken care of for employees who reply to the email. The department will pay for the morning, afternoon, or evening sessions. Employees must obtain permission from their supervisor and must clock out to attend Education Week.
educationweek.byu.edu

**Wellness**
If you enroll in DMBA insurance, you can participate in the DMBA Living Healthy Program. You can receive $30 for completing each of the six challenges and $70 for completing the Health Risk Assessment. If your spouse is on your plan, they can also receive money for completing the challenges. You can find more information about this here. Be sure to check out the BYU Wellness page for other wellness offerings at BYU and sign up for their newsletter.
hrd.byu.edu/wellnessprogram
### Phone List

#### Financial Services
- 4057 Alan Moose
- 9766 Andrew Neil
- 6218 Andy Cluff
- 1292 Braden Stohlt
- 4259 Brandon Dailey
- 4878 Brent Shutt
- 4023 Brian Blum
- 2929 Cherylann Aamodt
- 1538 Chris Shawcroft
- 2734 Corbin Emerick
- 8062 Craig Larson
- 2099 Crystal Frazier
- 8309 Cyndi Sederholm
- 5716 Dane Larsen
- 7548 David Morris
- 8123 David Nichols
- 4887 David Paul
- 6634 Glenda Tolman
- 6762 Heather Toponce
- 2623 Jennifer Lund
- 3693 Joel Christensen
- 7785 John Leatherwood
- 6943 Jon Hardy
- 2694 Kali McCleary
- 6590 Karen Whipple
- 8025 Kathleen Rugg
- 6639 Kevin Walker
- 2080 Larry McFerson
- 1625 Lori Glenn
- 3662 Lynette Cummings
- 4831 Maria Bateman
- 4436 Marshall Chamberlain
- 6641 Marva Yapias
- 1292 Michael Blackhurst
- 6220 Nancy Wilson
- 8962 Nathan Dunnigan
- 6591 Pamela Wilson
- 6630 Paul Larsen
- 8098 Preston Back
- 4703 Rebecca Harrison
- 6721 Ryan Wells
- 4759 Sabrina Warren
- 3784 Salani Pita
- 9030 Scott Campbell
- 7567 Shannon Kelly
- 6221 Shelby Barney
- 2004 Sheri Scheler
- 7648 Steven Morley
- 2914 Tammy Miner
- 5996 Terilee Hutchings
- 7694 Tiffany Hawkins

#### Purchasing & Travel
- 5125 Annette Landon
- 7014 Brian Ewell
- 2906 Brian Marks
- 7003 Bruce Roden
- 2925 Eric D. Smith
- 4702 Garlan McCoy
- 3727 Ginger Miller
- 0887 Heather Hughes
- 5290 Jake Packer
- 0775 Janna Gordon
- 7009 Jeff Moss
- 3998 Julie Ann Zarbock
- 7160 Karen Breton
- 7015 Kelly Taylor
- 9369 Kett Berry
- 8009 Kirstin Abbott
- 7010 Kristina Baardson
- 8026 Lori Sowards
- 3846 Lorie Andersen
- 7036 Lynette McCoy
- 3895 Marci McIntosh
- 7011 Megan Goodman
- 2909 Melissa Messervy
- 0040 Morgan Johnson
- 7016 Paul Anderson
- 7313 Paul Buckner
- 2920 Peter Esera
- 7006 Roland Nelson
- 5645 Shannon Tuckett
- 8027 Susan Walters
- 3972 Tammy Merrill
- 7001 Terry Hatch
- 9370 Todd Bird
- 7004 Todd Mortensen
- 9557 Trevor Boulter
- 9371 Tyler Hansen
- 9371 Wendy Baumgarten

#### Departments
- **ASB Numbers**
  - 5000 Admin. Sol. Students
  - 3418 ASB Custodian
  - 3738 ASB Custodian
  - 4418 Lobby Receptionist
  - 4840 Accounts Payable
  - 4833 Accounts Payable
  - 3784 ASB Mail Room
  - 4000 Check Processing
  - 0243 Fax/Accounts Payable

#### Administrative Solutions
- 1561 Adm. Sol. Students
- 6152 ASB Mail Room
- 3437 Accounts Payable
- 3872 Accounts Payable
- 3872 Accounts Payable
- 3845 Accounts Payable
- 3845 Accounts Payable

#### Budget Office
- 6152 ASB Mail Room
- 3437 Accounts Payable
- 3872 Accounts Payable

#### Financial Services
- 6000 ASB Mail Room
- 3872 Accounts Payable
- 3872 Accounts Payable
- 3872 Accounts Payable
- 3872 Accounts Payable

#### Payroll
- 6000 ASB Mail Room
- 3872 Accounts Payable
- 3872 Accounts Payable

#### Purchasing & Travel
- 6000 ASB Mail Room
- 3872 Accounts Payable
- 3872 Accounts Payable

#### Regulatory Accounting
- 6000 ASB Mail Room
- 3872 Accounts Payable
- 3872 Accounts Payable

#### Student Financial Services
- 4580 Student Health Ins.
- 5434 Study Abroad
- 6744 Meal Plans
- 8682 Student Svcs Super
- 8682 Student Svcs Super
- 2653 Bill Oldroyd
- 7463 Kahlil Taylor
- 6708 Morgan Reis

#### Student Services
- 4104 Student Accounts
- 2661 Student Health Ins.
- 6744 Study Abroad
- 6944 Meal Plans
- 8682 Student Svcs Super
- 8682 Student Svcs Super
- 2653 Bill Oldroyd
- 7463 Kahlil Taylor
- 6708 Morgan Reis

#### Student Financial Services
- 4580 Student Health Ins.
- 7549 Off Campus Receiv
- 3874 Stud Fin Students
- 3874 SFS Uploads

#### Student Services
- 4104 Student Accounts
- 2661 Student Health Ins.
- 6744 Study Abroad
- 6944 Meal Plans
- 8682 Student Svcs Super
- 8682 Student Svcs Super
- 2653 Bill Oldroyd
- 7463 Kahlil Taylor
- 6708 Morgan Reis

#### IT Services
- 4000 ASB Computer Sprt
- 1936 Ben Holmes (CSR)
- 9596 Mark Wright
- 801-360-9191 (cell)
- 8353 Eric Hansen
- 801-372-0485 (cell)
- Frank Staheli
- 801-420-7689 (cell)

#### Admin VP & CFO
- 3760 Katy Clark
- 3760 Steve Hafen
Phone System

Ordering a Phone Line

Lynette will help you order a phone line during your FS Orientation, but you are welcome to order it yourself if you would like to do so.

Click [here](#) to add a new employee to RingCentral. If they are being added to a specific line, add that phone number and OIT will add them to that phone line.

Click [here](#) to order a RingCentral phone line
• All new employees will need to request a new line and “request a specific extension number” at the bottom of the form. That is the extension being transferred from the previous employee.

Download the RingCentral App on your computer (and cell phone if you choose to use it)
• [www.ringcentral.com/download](http://www.ringcentral.com/download)
• Be sure to log on with ‘Single Sign On” using your netID@byu.edu

Click [here](#) for RingCentral training

Click [here](#) to remove/delete a RingCentral phone line

Click [here](#) to do the following or contact [financialservices@byu.edu](mailto:financialservices@byu.edu).
• Change name display on a physical RingCentral phone
• Cancel a RingCentral desk phone
• Make changes to your RingCentral desk phone

Click [here](#) to set up / make changes to voicemail
• Connect voicemail to email
• Link the voicemail to a different email account

Answering Devices

Some employees use their cell phone to answer their RingCentral calls and others prefer to use a device. You can let Lynette know if you would like a device when you meet with her for the FS Orientation Meeting or you can email [financialservices@byu.edu](mailto:financialservices@byu.edu). The devices we have been ordering for employees are listed below.

*Wireless bluetooth earpiece*
*Sony earbud headphones*
*Tecno bluetooth headphones that hang around neck*
Office Locations

AAVP Office
Alan Moose (B-355 ASB)
Lynette Cummings (A-153 ASB)

Accounts Payable (B-280)
Nancy Wilson
Scott Campbell
Shelby Barney

Administration VP (B-346)
Katy Clark
Steve Hafen

Budget (D-208)
Joel Christensen
Salani Pita

Financial Accounting (B-353)
John Leatherwood

Financial Acctg & Reporting (C-248)
Andrew Neil
Larry McFerson
Marshall Chamberlain
Rebecca Harrison
Ryan Wells

Grants & Contracts Acctg (A-261 ASB)
Cherylnn Aamodt
Corbin Emerick
Cyndi Sederholm
David Morris
Nathan Dunnigan

Payroll (D-55)
Chris Shawcroft
Jennifer Lund
Karen Whipple
Pam Wilson

Regulatory Acctg & Reporting (C-233)
Kathleen Rugg
Kevin Walker
Marva Yapias
Sheri Sechler
Terilee Hutchings

Student Financial Services (A-153)
Brandon Dailey
Brian Blum
Crystal Frazier
Glenda Tolman
Heather Topance
Kali McCleary
Lori Glenn
Tiffany Hawkins

Tax Office (B-280 ASB)
Paul Larsen
Preston Back
Maria Bateman

Treasury Services (A-153)
Braden Stohlton
Brent Shutt
Dane Larsen
David Paul
Jon Hardy
Sabrina Warren
Steve Morley
Tammy Miner

Program Granite (Crabtree Building)
Andy Cluff
Craig Larson
David Nichols
Shannon Kelly
Mike Blackhurst
**Meet Your Neighbors**

To really get to know and understand a place, you need to visit and meet the people. Take your supervisor or peer mentor along for the ride and go to the following locations. Meet the employees and have them tell you what they do in their office. Then have one person sign your sheet. When you have all the lines signed, take your paper to Lynette (or her student employees) in A-153 for a Jamba Juice certificate.

<table>
<thead>
<tr>
<th>Location</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAVP Office (Front Desk) – A-153 ASB</td>
<td></td>
</tr>
<tr>
<td>Accounts Payable – B-280 ASB</td>
<td></td>
</tr>
<tr>
<td>Budget – D-208 ASB</td>
<td></td>
</tr>
<tr>
<td>Financial Accounting &amp; Reporting – C-249 ASB</td>
<td></td>
</tr>
<tr>
<td>Grants &amp; Contracts Accounting – A-261 ASB</td>
<td></td>
</tr>
<tr>
<td>Payroll – D-55 ASB</td>
<td></td>
</tr>
<tr>
<td>Regulatory Accounting &amp; Reporting – C-233 ASB</td>
<td></td>
</tr>
<tr>
<td>Student Financial Services – A-153 ASB</td>
<td></td>
</tr>
<tr>
<td>Tax Office – B-280 ASB</td>
<td></td>
</tr>
<tr>
<td>Treasury Services – A-153 ASB</td>
<td></td>
</tr>
<tr>
<td>Alan Moose (Asst. Admin VP) – B-355 ASB</td>
<td></td>
</tr>
</tbody>
</table>

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*Jamba Juice Certificate*
Professional Development

Financial Services encourages employee development. Some options for training are listed below. Sometime in the next few weeks talk to your supervisor about your career plan and set some development goals.

**Tuition Benefit**
One of the best benefits we have at BYU is the ability to take classes at no charge. Go to [hrs.byu.edu/tuition-benefit](hrs.byu.edu/tuition-benefit) to learn more about how you can use your employee tuition benefit.

**BYU Training LMS**
Access online employment training developed for BYU students, faculty, and staff. There are a variety of courses you can take. To participate just log into [training.byu.edu](training.byu.edu) with your BYU netID and password and look for the courses you are interested in learning. If you have any questions about the new system, please email training@byu.edu. Online courses are a great investment in your development!

**LinkedIn Training**
All BYU Employees have access to LinkedIn Learning. Use Your BYU email to log in. Human Resource Development has a list of recommended courses at [hrd.byu.edu/linkedin-training](hrd.byu.edu/linkedin-training). If you have problems getting in, contact OIT at 2-4000.

**Software Training**
Learn to use popular software from Adobe, Microsoft, and others. There are a variety of courses you can take. To register visit [lib.byu.edu/services/software-training](lib.byu.edu/services/software-training).

**Workshop Training**
Human Resource Development offers workshops to non-student employees. These workshops include Crucial Conversations, Influencer, Multipliers, The 5 Choices, The 7 Habits of Highly Effective People and more. To find out more go to [hrd.byu.edu/workshops](hrd.byu.edu/workshops).

**Devotional & Forum**
Employees are encouraged to attend devotional on Tuesdays at 11am in the Marriott Center. Non-student employees can attend on the clock. Go to [calendar.byu.edu/devotionals-forums](calendar.byu.edu/devotionals-forums) for a list of speakers.

**Financial Management Forum**
The main purposes of the BYU FMF are to (1) promote and increase financial literacy at BYU, (2) provide opportunities for professional development, and (3) help colleagues in finance-related roles become acquainted, network, and share best practices. Email dane_larsen@byu.edu to be added to the email list.

**Controller Group Meetings**
These meetings are held every other month. Their purpose is to give financial updates to employees across campus. All Financial Services employees are invited to attend these meetings on Zoom. A calendar invite will be sent to you a month before each meeting.

**Off-Site Training**
Funds are available for employees to attend conferences and other off-site training. If you are interested in this type of training, speak to your supervisor.
Awards

You can nominate your fellow employees for the following awards.

**SAERA Award**
The BYU President’s Council has adopted a set of values for all BYU staff and administrative employees. The Staff and Administrative Employee Recognition Awards recognize the demonstration of these values for all BYU staff and administrative employees.

Throughout the year employees (including part-time Category I and II) can be nominated by co-workers in their own or other departments, supervisors, or faculty members. This can be done by accessing the nomination form at saera.byu.edu.

**Student of the Semester**
Each semester all full-time employees in Financial Services are invited to nominate outstanding student employees for this award so be on the lookout for someone you can nominate.

**Cougar Cash Coupon**
If you want to show appreciation for any full-time or student employee, you can give them a cougar cash coupon. They can be obtained from Lynette or her student employees in A-153.

Training

**Required Trainings**
Be sure to do the following required training within your first two weeks of employment.
- Sexual Harassment Prevention for Employees
- Information Security and Privacy Essentials

[welcome.byu.edu/first-week](welcome.byu.edu/first-week)

**Basic Financial Training**
To get a basic idea of how BYU financials work, complete the basic financial training found in the Financial Services catalog on training.byu.edu.

**OPAC**
The mission of the BYU Office Professionals Association Conference is to:
- Promote excellence by providing opportunities for networking, recognition, and exchange of ideas
- To encourage individual and professional growth

OPAC sponsors a conference and brown bags. Financial Services employees can attend on the clock, so watch for emails about their events.

More information can be found at hrs.byu.edu/opac-conference.
The Financial Services webpage can be found at finserve.byu.edu. A lot of helpful information can be found here including the following:

- Information for Students/Parents
- Information for Student Employees
- Information for Faculty/Staff Employees
- Financial Management Information

Financial Management Information is where you will spend the most time. That is where you will find information on the following:

- Accounting
- Budget
- CFO & Controllershpin
- Endowments & Gifts
- Grants & Contracts
- Payments
- Payroll
- Receivables
- Tax
- Treasury
- Accounting Calendar
- Contact information
- Forms
- Procedures
- Systems

### My BYU Website

Links can be added to my.byu.edu by clicking on the "Add Links" button at the bottom of the page. Some items to add are listed below, but there are many others available. Take a minute and look through them.

- Cell Phone Services
- DMBA
- Employee Wellness Program
- Parking Registration
- Sick & Vacation Balances
- University Org Chart
- University Policies/Procedures
- UTA Bus Pass
- Cougar Cash
- Email Alias Manager
- Financial Services
- My Financial Services
- Personal Information
- Simply Travel
- View Paycheck
- W-2 View/Print, Consent

### Things to review:

Who to Contact page located at finserve.byu.edu/contact
Procedures located at finserve.byu.edu/procedures
This is a list of policies used by Financial Services, and it is recommended that you review them. These and all university policies are found at policy.byu.edu. Be sure to check out the procedures.

**Those where Financial Services is the “Responsible Office” include:**
- Accounts Receivable Policy
- Asset Write-Off Policy
- Budget Policy
- Business Gifts and Entertainment Policy
- Cash and Cash Equivalents Policy
- Check Cashing Policy
- Disposition of University Collections Policy
- Financial Accounting Policy
- Independent Contractors Policy
- Inventory of Products and Supplies Policy
- Meals and Hosting Policy
- Memberships, Dues, and Subscriptions Policy
- Merchant Credit Card Policy
- Moving Policy
- Payroll Policy
- Sales Tax Policy
- Tuition and Fees Policy

**HR and others to also become familiar with are:**
- Administrative and Staff Employment Policy
- Administrative and Staff Employee Leaves Policy
- Administrative and Staff Employee Discipline Policy
- Administrative and Staff Employee Grievance Policy
- Advertising, Selling, Soliciting Policy
- Catering and Food Distribution Policy
- Compensation Policy
- Conflict of Interest Policy
- Employee Termination Policy
- Employee-Vendor Policy
- Fraud Policy
- Financial Conflict of Interest in Sponsored Research Policy
- Legal Documents Policy
- Out-of-State Work Policy
- Post-retirement Employment Policy
- Purchasing Policy
- Risk Management and Safety Policy
- Staff Overtime Policy
- Student Employment Policy
- Supplemental Compensation for Administrative Employees Policy
- Surplus Property Policy
- Travel Policy
- University Fund Raising Policy
- University Personnel Tuition Policy
- Workweek for Employees Policy

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**Y-Time (Staff Employees)**

Navigate to training.byu.edu and go to the Financial Services catalog. Enroll in and complete the following trainings.

- Adding Y-Time for Mobile
- Using Y-Time for Mobile
- Staff Members can also add their sick/vacation time using the mobile app.

You can contact your Y-Time Manager to make corrections. They can also answer any questions you may have.

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Breaks – Employees are entitled to one break for each 4-hour shift. Employees should not clock out for breaks shorter than 20 minutes.
Scheduling Rooms

**Do the following to schedule rooms for meetings or events**

Add the room as an attendee using Scheduling Assistant in Outlook:
- B-52 ASB (ASB_52)
- B-354 ASB (B354_ASB)

Call Campus Scheduling at 2-3134 to schedule the following rooms:
- A-203 ASB
- C-245 ASB
- Rooms in the Wilkinson Student Center

Go to [hinckleycenter.byu.edu/reservations](http://hinckleycenter.byu.edu/reservations) to schedule the Hinckley Center

Go to [conferencecenter.ce.byu.edu](http://conferencecenter.ce.byu.edu) to schedule rooms at the Conference Center

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**Lunch Options**

**Spaces available to eat lunch**
- ASB Mini Mart
- C-233 conference room (when the auditors are not using it) – From 12-1:30pm
- Open area in Budget Office – From 12-1pm (if closed, key can be obtained in A-153 ASB)
- There are tables and microwaves available in the Wilkinson Center across from the Cougareat
- There are several other places to eat lunch across campus:
  - Bring your own lunch locations – Snack section in the library, courtyard of the JFSB, outside of the Creamery on 9th, seating areas on the 2nd floor of the Wilk, the small alcove on the west side of the HBLL, and there are picnic tables on the walking trail on the south side of campus
  - Ideas of places to buy lunch on campus – Along with the Cougareat and Cannon Center there are less known locations where you can get lunch. They include the Blue Line Deli in the Tanner Building, the MOA café, Legends Grille, and Harvey’s. A full list of BYU Dining locations is at [dining.byu.edu](http://dining.byu.edu).
  - Another less known location is the Pendulum Court Café which is run by the students studying Dietetics. [pencourt.byu.edu](http://pencourt.byu.edu)

**Sinks**
- HR has a kitchen in D-240 ASB that can be used
- There are sinks in the custodial closets on the 2nd and 3rd floors that can be used to rinse out dishes (B-239 & C-238)

**Ice machines**
- HR has a pebble ice machine in their kitchen (D-240 ASB)
- C-233 has a pebble ice machine that can also be used
Acronyms

1042-S – Foreign Person Tax Form
1098-T – Tuition Tax Form
AP – Accounts Payable
AR – Accounts Receivable
BAC – Budget and Appropriations Committee
BISC – Bank Information Security Compliance
BOB – Business Objects
CBO – Church Budget Office
CES – Church Educational System
CNA – Capital Needs Analysis
COL – Collections
CSR - Computer Support Resource
CUBS – Church Unit Banking System
ECSI – Third party loan processor
ERP – Enterprise resource planning
F&A – Facilities & Administrative Costs: overhead costs charged to award sponsors to cover indirect costs (i.e. electricity, laboratory space, custodial, etc.)
FACTA – Fair and Accurate Credit Transactions Act
FAR - Federal Acquisition Regulation: rules regarding Federal government procurement
FERPA – Family Educational Rights and Privacy Act
Fin Aid – Financial Aid
FRA – Financial Responsibility Agreement
FS – Financial Services
FT – Full-Time
FTE – Full-Time equivalent
GCA – Grants & Contracts Accounting (Research Accounting)
HIPA – Health Information Privacy
IROP – Internal Record of Purchase (PDF receipt for CUBS/MME)
ITD – Information Technology Development
ITI – Information Technology Infrastructure
ITS – Information Technology Software
JE – Journal Entry
LDSP - LDS Philanthropies
LMS – Learning Management System
LOC – Letter of Credit: given to BYU to obtain reimbursement of $ spent from various Federal Agencies
MFC – My Financial Center
MME – Money Movement Engine
NACUBO – National Association of College and University Business Officers
NRA – Non Resident Alien
OCR – Off Campus Receivables
OCS – Off Campus Scholarships
OGC – Office of General Council
OIT – Office of Information Technology
OMB – US Office of Management and Budget
PCI – Payment Card Industry
PI – Principal Investigator: lead researcher on a sponsored research project
PMS – Payment Management System: used by HHS, NASA, USDA and BYU to receive funds and report to Federal Agencies
PS – Peoplesoft
PT – Part-Time
RAO – BYU’s Research Administration Office
RPA – Robotic Process Automation
SDM – Service Delivery Model (Workday)
SDR – Semi-annual Department Review
SFS – Student Financial Services
SHP – Student Health Plan
SOL – Statute of Limitations
STL – Short Term Loan
SUA – Single Use Account
UBIT – Unrelated Business Income Tax
UG – Uniform Guidance: Regulations from the US Office of Management and Budget that govern federally sponsored awards.
UI – User interface
WACUBO – Western Association of College and University Business Officers

Acronyms for Common Sponsors of Research Projects:
DED – US Dept of Defense
DOE – US Dept of Energy
DOI – US Dept of the Interior
DOJ – US Dept of Justice
DOT – US Dept of Transportation
ED – US Dept of Education
HHS – US Dept of Health and Human Services
NASA – National Aeronautical and Space Administration
NIH – National Institutes of Health
NSA – National Security Agency
NSF – National Science Foundation
USGS – US Geological Survey
USDA – US Dept of Agriculture
VA – US Dept of Veterans Affairs
Evacuation Plan

ASB General Evacuation Instructions
1. Emergency Coordinators should identify individuals who may need special assistance in evacuating from the building. Have a plan for specific needs. (The Emergency Coordinator for Financial Services is Lynette Cummings.)
2. The evacuation will be initiated by the sounding of the building fire alarm.

Please follow the steps below:

- Immediately exit the building following the evacuation route for your floor and office as indicated on the included floor plans. Assemble at your organization’s indicated location (see page 30).
- Organizations with special requirements must follow their own established procedures. For example, secure all cash before exiting. If this is a real emergency the special procedures shall be suspended and exiting should be immediate.
- If possible, assigned Emergency Coordinators should make sure area is cleared before exiting.
- Emergency Coordinators should carry a list of all personnel in their areas (including student employees). This list will be used to account for all organization members once all are in the designated assembly areas.
- Once all personnel have arrived at the assembly area, the Emergency Coordinator will take role from the employee list and provide it to the Emergency Supervisor who will be located at the fountain directly north of ASB and wearing an orange vest.
- When all roles have been turned in to the Emergency Supervisor, a verbal all clear will be given and personnel may return to their offices.
EVACUATION ASSEMBLY AREAS FOR ASB PERSONNEL

Based upon your department, assemble in the locations indicated by the numbers below and shown on the attached map. Until the accounting is completed and the all clear is given, please remain in your designated assembly location.

DEPARTMENT ASSEMBLY LOCATION
PLANNING & ASSESSMENT 1
CUSTODIANS 2
MAIL ROOM 2
GENERAL COUNSEL 4
ORCA & TECHNOLOGY TRANSFER 5
FINANCIAL SERVICES & ADMINISTRATIVE SOLUTIONS 6
HUMAN RESOURCES 7
SAAS 8
OFF CAMPUS HOUSING 9
PURCHASING & TRAVEL 10
COMPLIANCE AND AUDIT 11
UNIVERSITY COMMUNICATIONS 12
PRESIDENT’S OFFICE & VICE PRESIDENTS’ OFFICES 13