

# FINANCIAL SERVICES

Trusted Business Partners









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# Welcome Page

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](http://welcome.byu.edu) website. An online version can be found at [finserve.byu.edu/new\\_full-time\\_employee](http://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](mailto:lynette_cummings@byu.edu)  
Office: A-153 ASB  
Phone #: 2-3662

Lynette's Student Employees  
Email: [financialservices@byu.edu](mailto: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

FINANCIAL SERVICES

# 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.

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## 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](https://aims.byu.edu)



# New Employee Checklist

## Welcome Page

Go to [welcome.byu.edu](http://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](http://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](http://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](http://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](http://myaccount.byu.edu) before bringing the family to campus to get ID cards.

# 6

## Computer Set Up

- Click [here](#) to order email
- Manage email alias at [alias.byu.edu](mailto: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.

# 7

## 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).

# 8

## 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)

# 9

## 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.

# 10

## 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

## 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](#)



### 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



# 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](https://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.

*Professional  
Development  
Council*

*Annual  
Activities  
Council*

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.

*Employee  
Engagement  
Council*

*Newsletter  
Council*

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.

*Division  
Meetings  
Council*

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

**Shirts:** clean, neatly-pressed collared shirts; golf shirts

**Inappropriate shirts:** no-collared shirts, sweatshirts, T-shirts

**Slacks:** clean, neatly-pressed khakis, dress pants or slacks

**Inappropriate slacks:** wrinkly, worn or tattered pants; blue jeans

**Shoes:** loafers or dress shoes

**Inappropriate shoes:** flip-flops, athletic shoes, sandals



### Women

**Shirts:** clean, neatly-pressed shirts, blouses or sweaters

**Inappropriate Shirts:** sweatshirts, T-shirts, tight or revealing shirts or shirts with holes

**Slacks:** clean, neatly-pressed dress pants or slacks

**Inappropriate Slacks:** wrinkly, worn or tattered pants; blue jeans

**Dresses and Skirts:** clean, neatly-pressed casual dresses and skirts

**Inappropriate Dresses and Skirts:** Anything above the knee

**Shoes:** dressy sandals or dress shoes

**Inappropriate Shoes:** flip-flops, athletic shoes



# 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](http://byudiscounts.byu.edu)

[hrs.byu.edu/byu-campus-benefits](http://hrs.byu.edu/byu-campus-benefits)

EMPLOYEE  
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](mailto:cellular@byu.edu).

[byucellphones.byu.edu](http://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](http://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](http://hrd.byu.edu/wellnessprogram)



# Phone List

## Financial Services

4057 Alan Moose  
 9766 Andrew Neil  
 6218 Andy Cluff  
 6590 Ashley Heyborne  
 1292 Braden Stohlton  
 4259 Brandon Dailey  
 4878 Brent Shutt  
 4023 Brian Blum  
 2929 Cherylnn Aamodt  
 1538 Chris Shawcroft  
 2734 Corbin Emerick  
 8062 Craig Larson  
 2009 Crystal Frazier  
 7125 Cyndi Sederholm  
 8309 Dallin Fredrickson  
 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  
 8025 Kathleen Rugg  
 6639 Kevin Walker  
     801-404-1234 (Cell)  
 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 Sechler  
 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 Brereton  
 7015 Kelly Taylor  
 9369 Kett Berry  
 8009 Kirstin Abbott  
 7129 Kristina Baardson  
 8026 Lori Sowards  
 3846 Lorie Andersen  
 7036 Lynette McCoy  
 3895 Marci McIntosh  
 7011 Megan Goodman  
 2909 Melissa Messervy  
 0040 Morgan Johnson  
 7010 Park Romney  
 5060 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  
 6152 Trevor Boulter  
 3472 Tyler Hansen  
 9371 Wendy Baumgarten

## Admin Solutions

7897 Anya Allred  
     801-404-0686 (Cell)  
 7975 Chad Feilbach  
 1126 David Horne  
     385-335-0045 (cell)  
 8061 Duff Gardner  
 6628 Ed McCracken  
 1553 Jeff Arnell  
 8626 Levi Smith  
 7809 Mark Madsen  
     801-404-1641 (Cell)  
 7803 Patrick Vincent  
     801-404-7823 (Cell)

## Departments

### ASB Numbers

4840 ASB Custodian  
 4833 ASB Custodian  
 3738 ASB Mail Room  
 4418 Lobby Receptionist

### Accounts Payable

3845 Accounts Payable  
 3847 Check Processing  
 0243 Fax/Accts Payable

### Administrative Solutions

1861 Adm. Sol. Students

### Asset Management

3418 Asset Mgt Student

### Budget Office

6633 Budget

### Financial Services

4701 A-153 Front Desk  
 0241 Fax/A-153 ASB

### General Accounting

6106 Gen Acctg Student

### Off Campus Receivables

7549 Students

### Payroll

8186 Payroll students

### Purchasing & Travel

3872 Purchasing  
 3872 Travel  
 7311 Cell Phone Office  
 5644 Help Desk  
 0608 Fax/Purchasing  
 0608 Fax/Travel

### Regulatory Accounting

5990 Research Students  
 6632 Regulatory Student  
 7202 Unclaimed Property  
 7100 Tax Students

### Student Services

4104 Admissions  
 4104 Discontinuance  
 4104 Financial Aid  
 0235 Fax/Financial Aid  
 2611 Housing (campus)  
 4701 Petitions (Tuition)  
 2631 Registration  
 4104 Scholarship Office  
     -Dept & Univ  
 6434 -Off Campus  
 6433 -Voc Rehab

4104 Student Accounts  
 2661 Student Health Ins.  
 6741 Study Abroad  
 6944 Meal Plans  
 8682 Student Svcs Super  
 8681 Student Svcs Super  
 2653 Bill Oldroyd  
 7463 Kahlie Taylor  
 6708 Morgan Reis  
 7075 D-148 Receptionist

### Student Financial Services

4580 1098T Questions  
 7549 Off Campus Receiv  
 3874 Stud Fin Students  
 3874 SFS Uploads

### Treasury Services

4759 Agency Accounts  
 7806 Deposit Window  
 7767 Deposits  
 8309 Wire Transfers

### Conference Rooms

4826 Conference Room  
     (C-233A)

## IT Services

4000 Computer Support  
 7890 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.

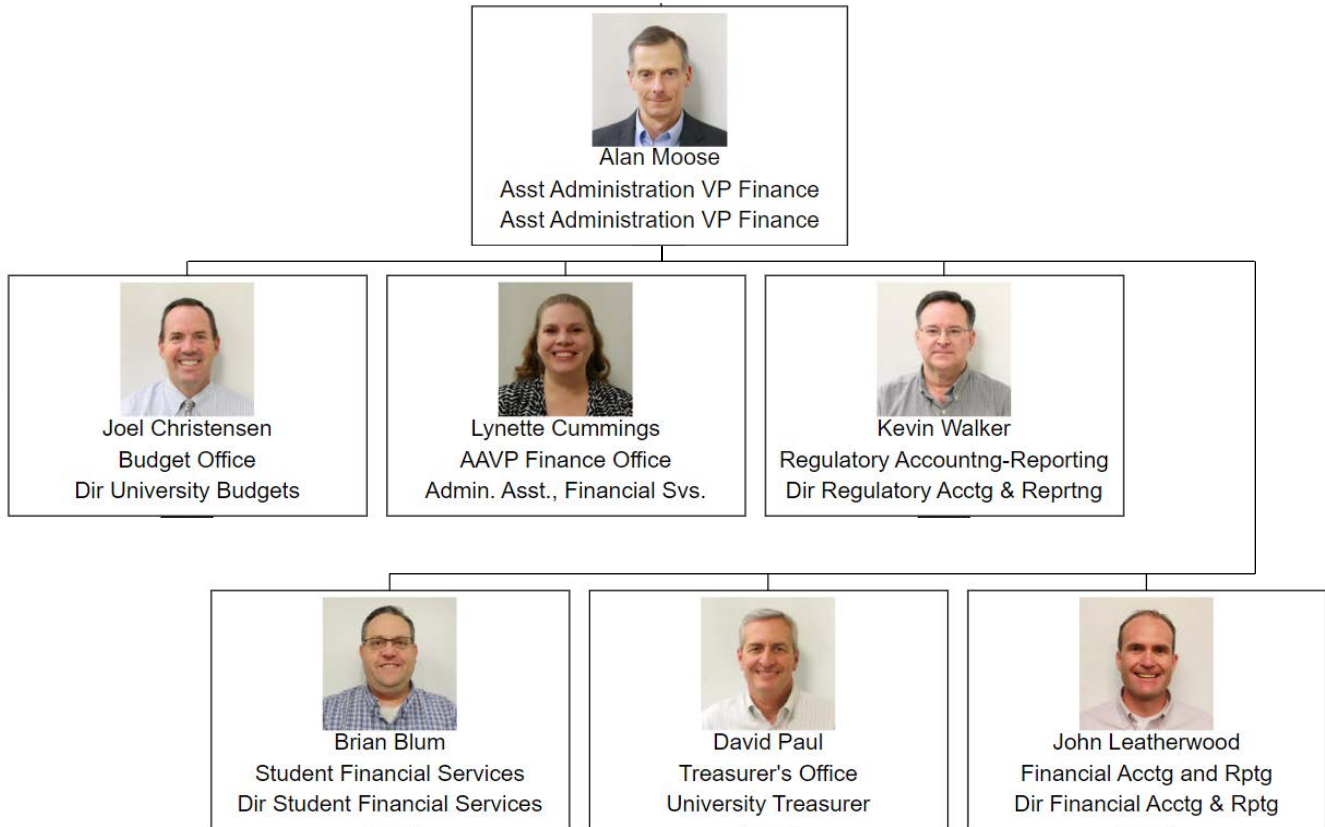
[Wireless bluetooth earpiece](#)

[Sony earbud headphones](#)

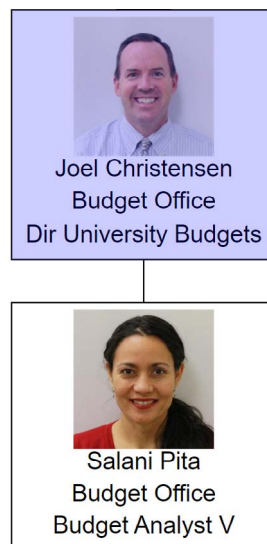
[Tecno bluetooth headphones that hang around neck](#)



# Org Charts



## Budget

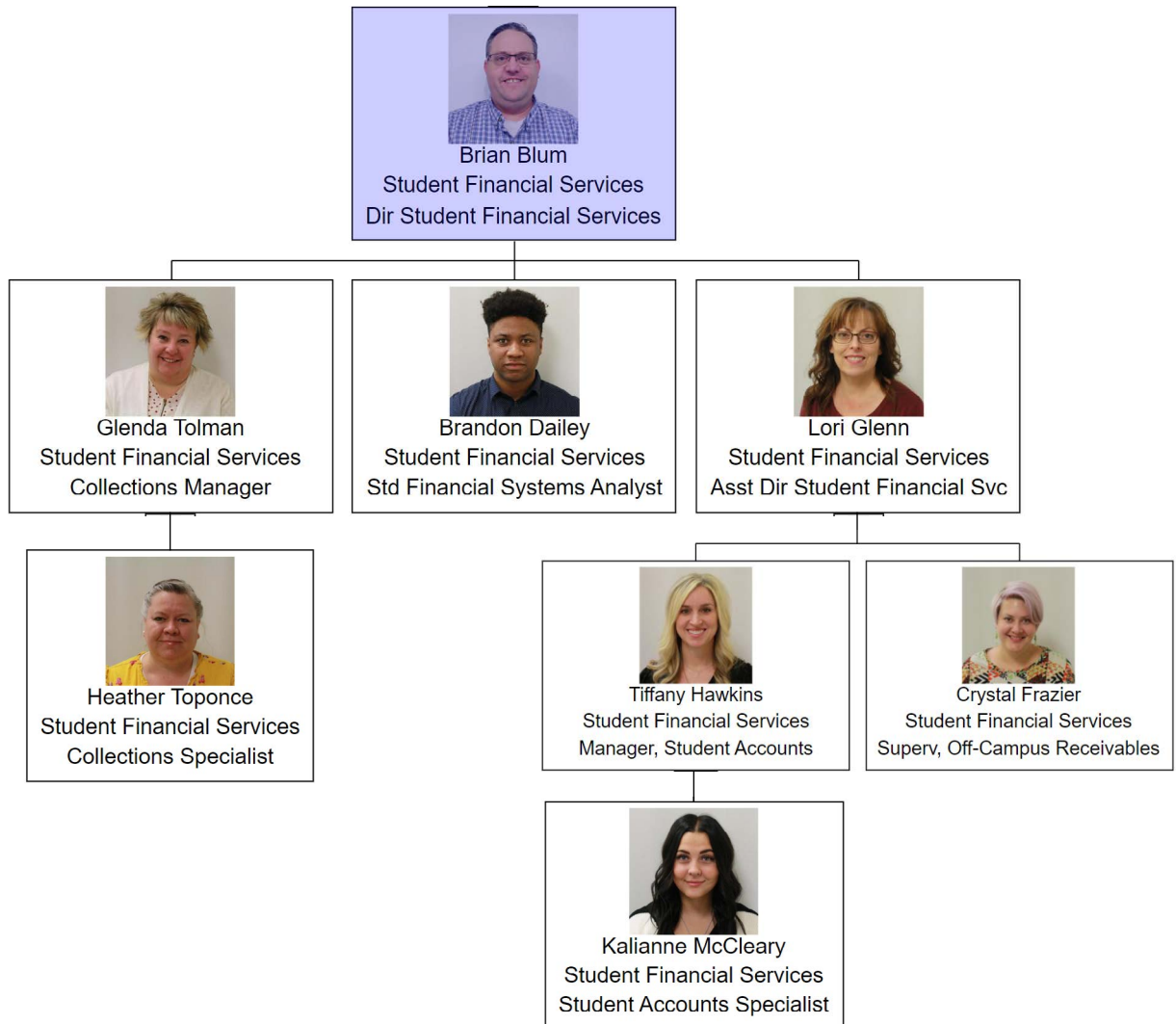




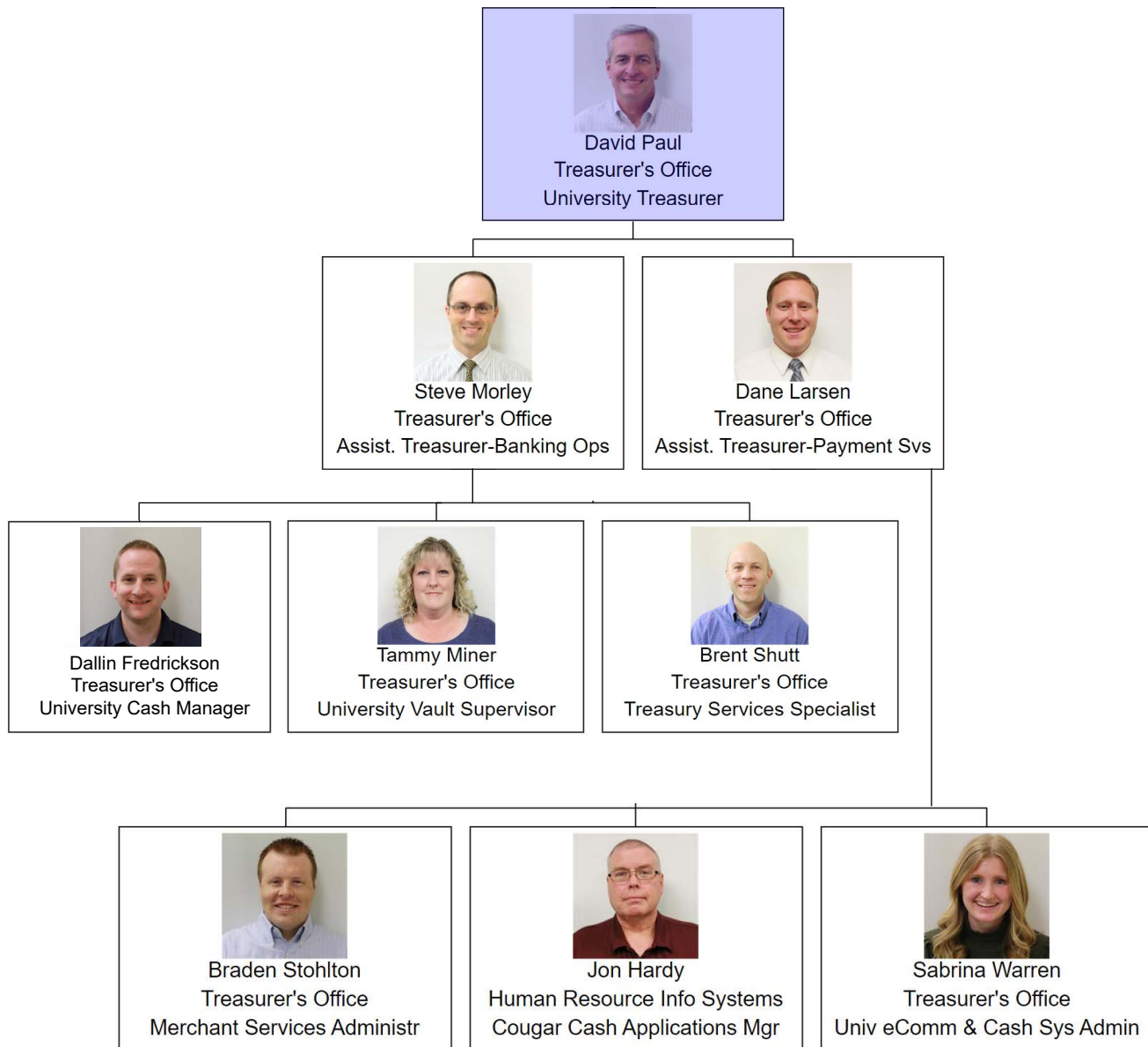
## Regulatory Accounting



## Student Financial Services

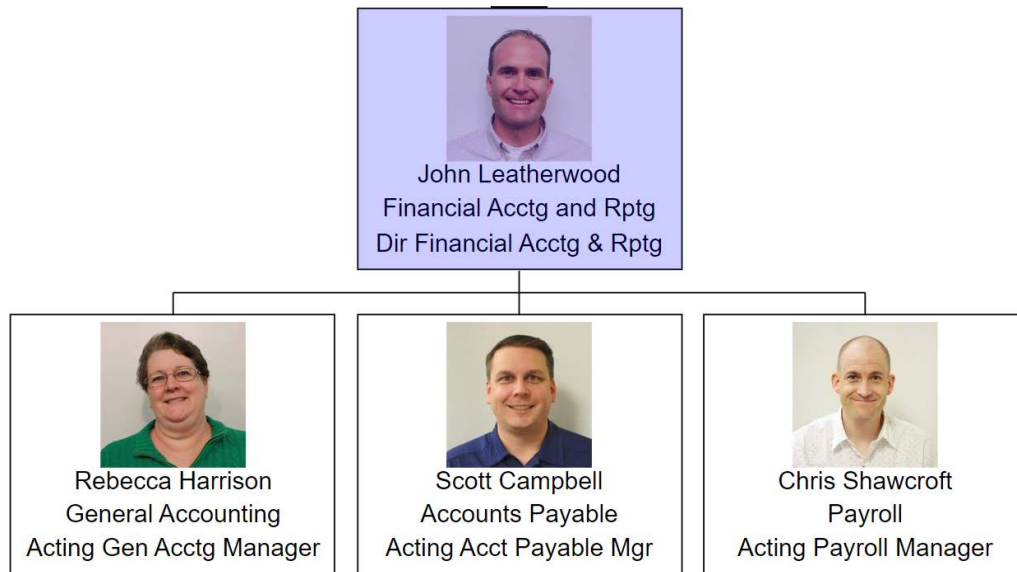


## Treasury Services

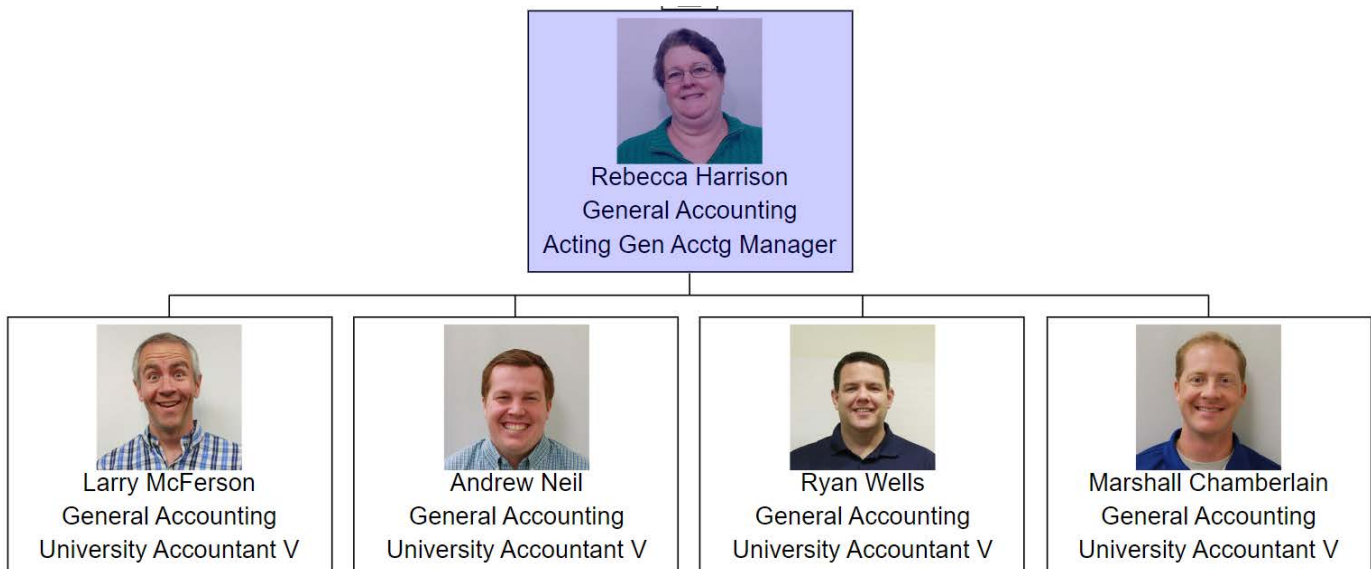




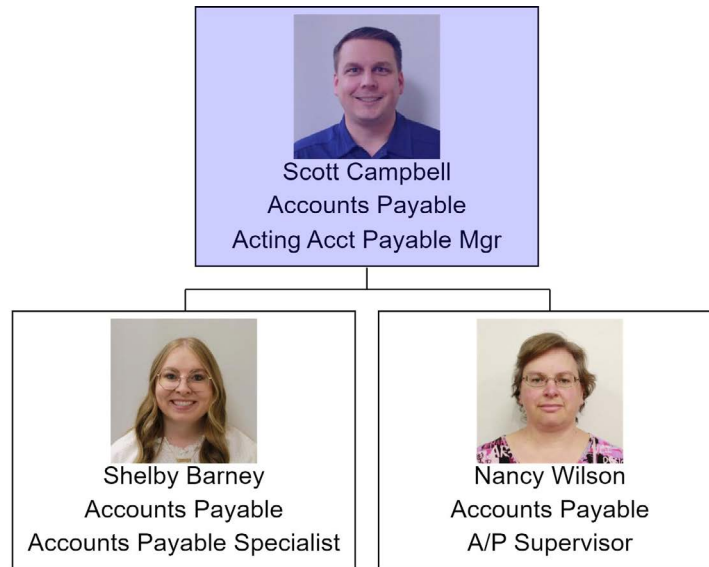
## *Financial Accounting & Reporting*



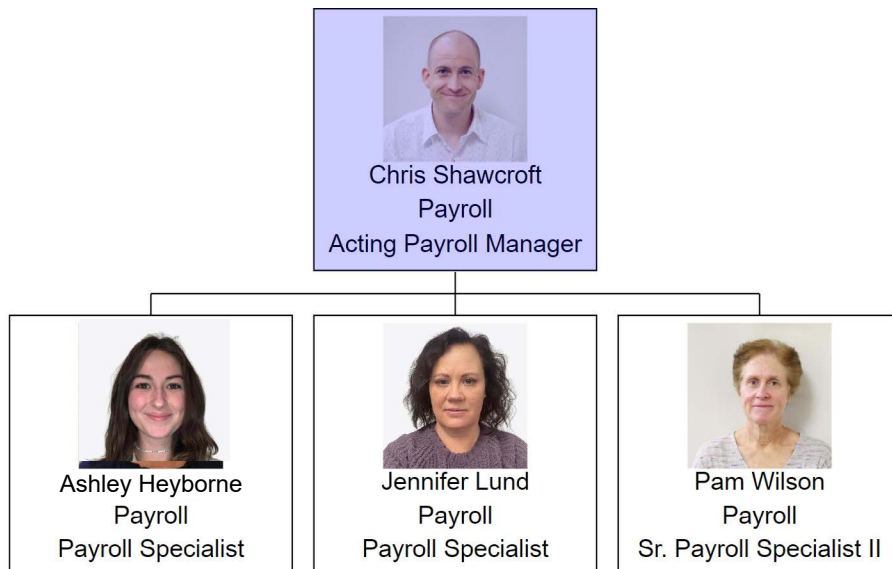
## *General Accounting*



## *Accounts Payable*



## *Payroll*



# 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

## **Program Granite (Crabtree Building)**

Andy Cluff  
Craig Larson  
David Nichols  
Shannon Kelly  
Mike Blackhurst

## **Payroll (D-55)**

Ashley Heyborne  
Chris Shawcroft  
Jennifer Lund  
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  
Dallin Fredrickson  
Dane Larsen  
David Paul  
Jon Hardy  
Sabrina Warren  
Steve Morley  
Tammy Miner

# 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.

AAVP Office (Front Desk) – A-153 ASB

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Regulatory Accounting & Reporting – C-233 ASB

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Accounts Payable – B-280 ASB

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Student Financial Services – A-153 ASB

---

Budget – D-208 ASB

---

Tax Office – B-280 ASB

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Financial Accounting & Reporting – C-249 ASB

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Treasury Services – A-153 ASB

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Grants & Contracts Accounting – A-261 ASB

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Alan Moose (Asst. Admin VP) – B-355 ASB

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Payroll – D-55 ASB

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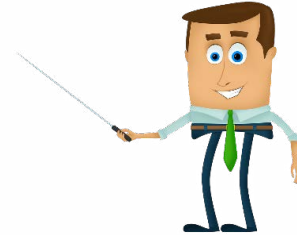


# Professional Development

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](https://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](https://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](mailto: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](https://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](https://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](https://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](https://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](mailto: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](http://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](http://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](http://training.byu.edu).

## OPAC

The mission of the BYU Office Professionals Association Conference is to:

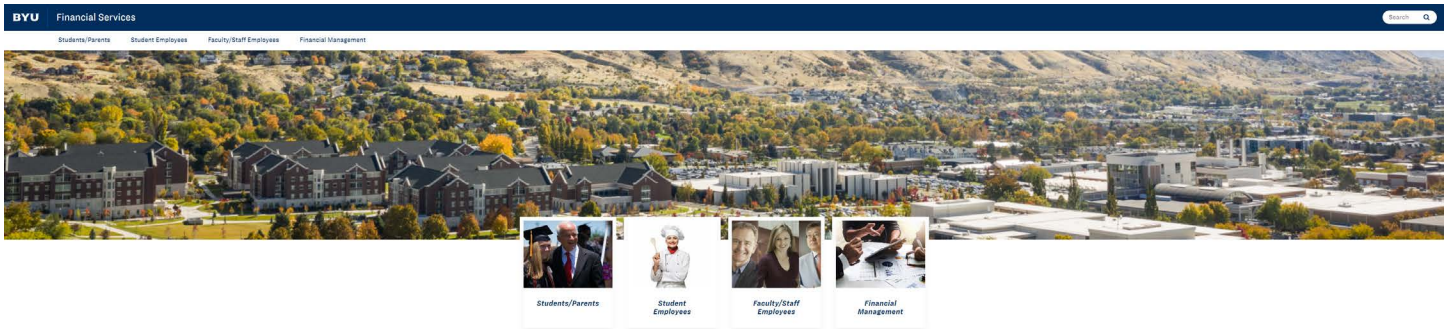
- Promote excellence by providing opportunities for networking, recognition, and exchange of ideas
- To encourage individual and professional growth

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](http://hrs.byu.edu/opac-conference).



# FS Webpage



## Financial Services Web Page

The Financial Services webpage can be found at [finserve.byu.edu](https://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 & Controllershship
- 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](https://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            | • Cougar Cash             |
| • DMBA                           | • Email Alias Manager     |
| • Employee Wellness Program      | • Financial Services      |
| • Parking Registration           | • My Financial Services   |
| • Sick & Vacation Balances       | • Personal Information    |
| • University Org Chart           | • Simply Travel           |
| • University Policies/Procedures | • View Paycheck           |
| • UTA Bus Pass                   | • W-2 View/Print, Consent |

## Things to review:

Who to Contact page located at [finserve.byu.edu/contact](https://finserve.byu.edu/contact)

Procedures located at [finserve.byu.edu/procedures](https://finserve.byu.edu/procedures)

# Policies

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](http://policy.byu.edu). Be sure to check out the procedures.

## **Those where Financial Services is the “Responsible Office” include:**

- o [Accounts Receivable Policy](#)
- o [Asset Write-Off Policy](#)
- o [Budget Policy](#)
- o [Business Gifts and Entertainment Policy](#)
- o [Cash and Cash Equivalents Policy](#)
- o [Check Cashing Policy](#)
- o [Disposition of University Collections Policy](#)
- o [Financial Accounting Policy](#)
- o [Independent Contractors Policy](#)
- o [Inventory of Products and Supplies Policy](#)
- o [Meals and Hosting Policy](#)
- o [Memberships, Dues, and Subscriptions Policy](#)
- o [Merchant Credit Card Policy](#)
- o [Moving Policy](#)
- o [Payroll Policy](#)
- o [Sales Tax Policy](#)
- o [Tuition and Fees Policy](#)



## **HR and others to also become familiar with are:**

- o [Administrative and Staff Employment Policy](#)
- o [Administrative and Staff Employee Leaves Policy](#)
- o [Administrative and Staff Employee Discipline Policy](#)
- o [Administrative and Staff Employee Grievance Policy](#)
- o [Advertising, Selling, Soliciting Policy](#)
- o [Catering and Food Distribution Policy](#)
- o [Compensation Policy](#)
- o [Conflict of Interest Policy](#)
- o [Employee Termination Policy](#)
- o [Employee-Vendor Policy](#)
- o [Fraud Policy](#)
- o [Financial Conflict of Interest in Sponsored Research Policy](#)
- o [Legal Documents Policy](#)
- o [Out-of-State Work Policy](#)
- o [Post-retirement Employment Policy](#)
- o [Purchasing Policy](#)
- o [Risk Management and Safety Policy](#)
- o [Staff Overtime Policy](#)
- o [Student Employment Policy](#)
- o [Supplemental Compensation for Administrative Employees Policy](#)
- o [Surplus Property Policy](#)
- o [Travel Policy](#)
- o [University Fund Raising Policy](#)
- o [University Personnel Tuition Policy](#)
- o [Workweek for Employees Policy](#)

## *Y-Time (Staff Employees)*

Navigate to [training.byu.edu](http://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.

---

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

# 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 Cougarcat
- 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 HBL, 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 Cougarcat 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

# BYU

# 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.





1" = 20'-0"

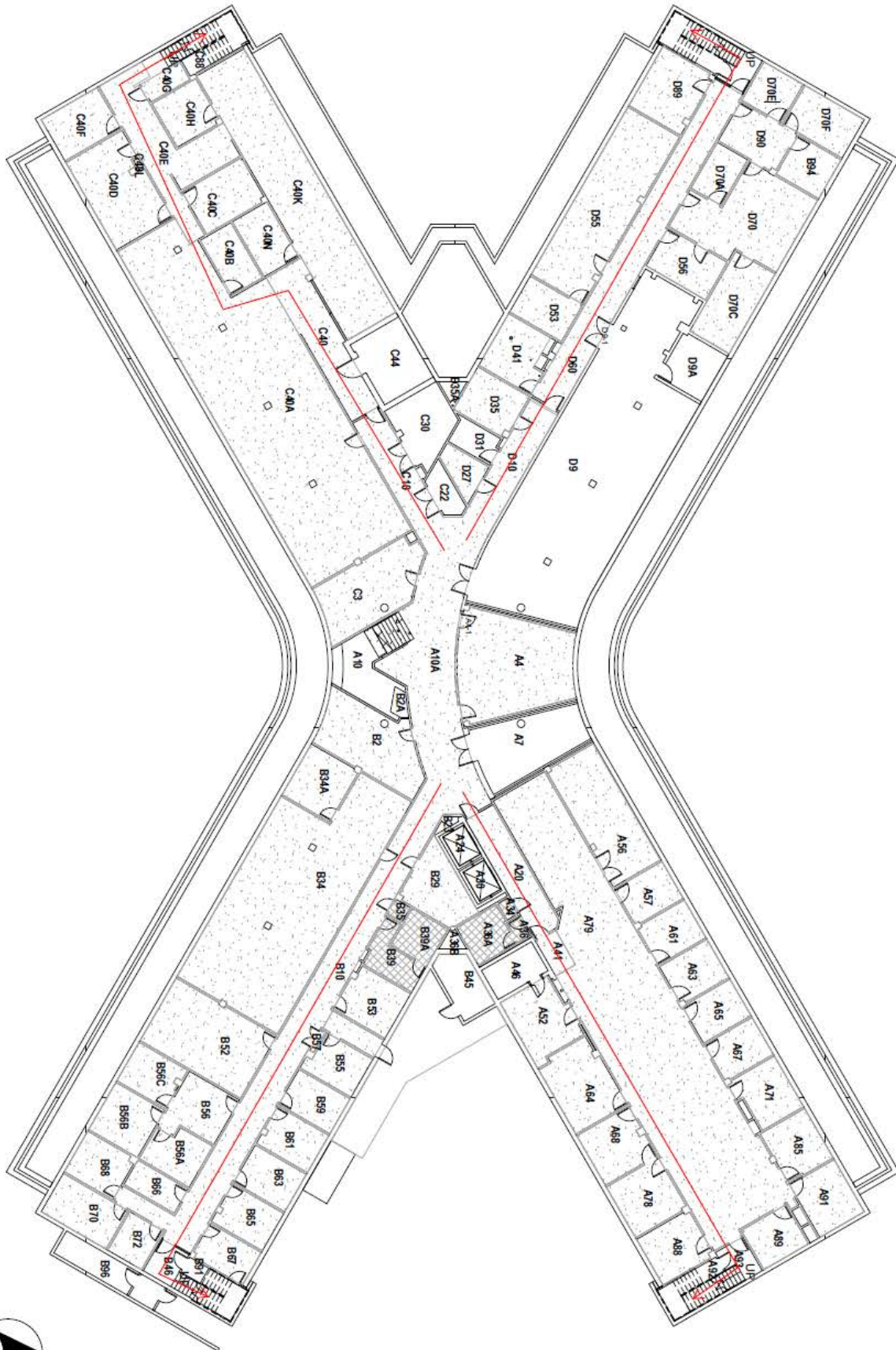


FACILITIES PLANNING  
240 BRWB PROVO, UT 84602  
PHONE: (801) 422-5504

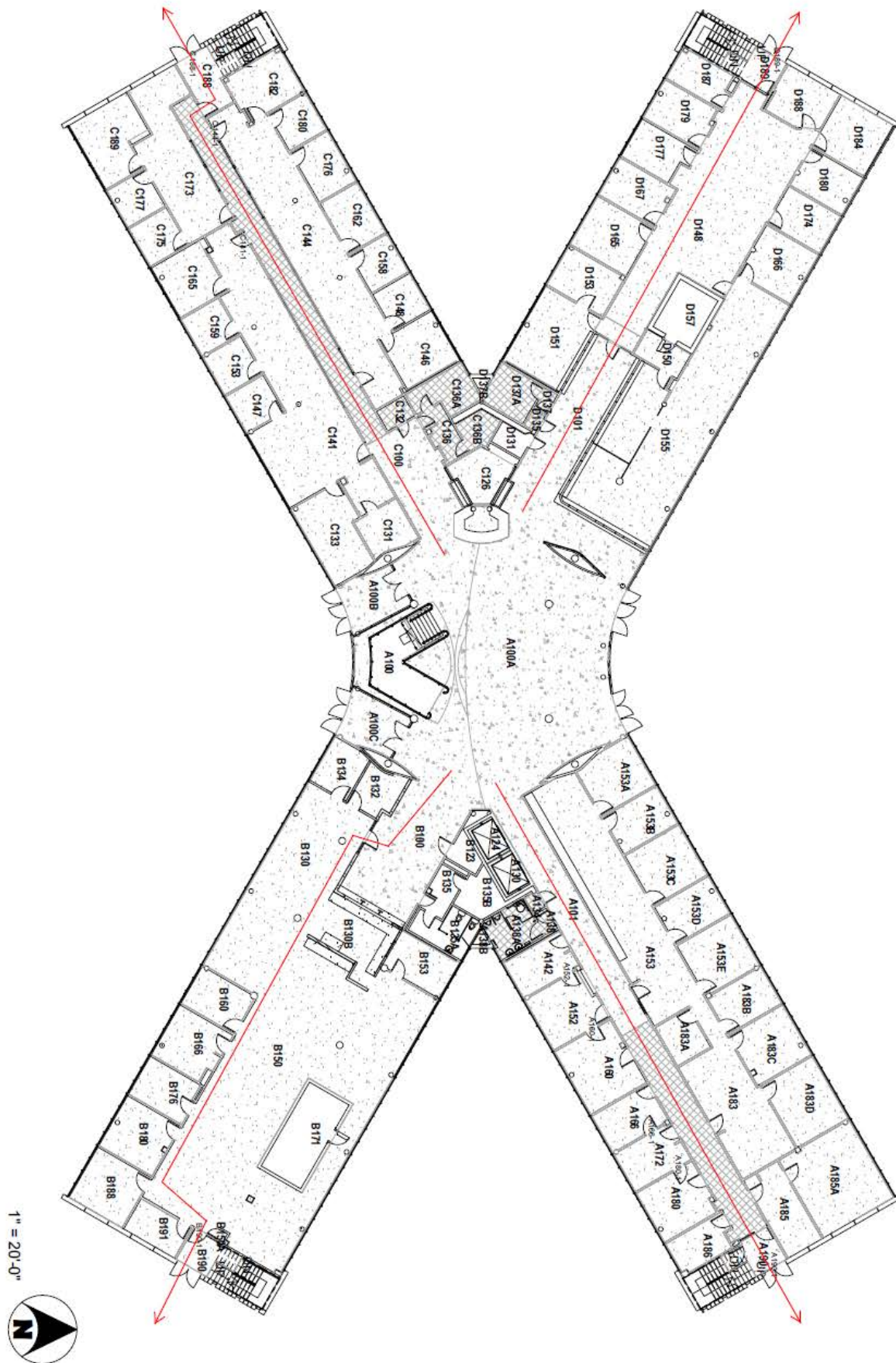
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7/1/2014  
4:06:12 PM

BRIGHAM YOUNG  
UNIVERSITY

**ASB**  
Basement



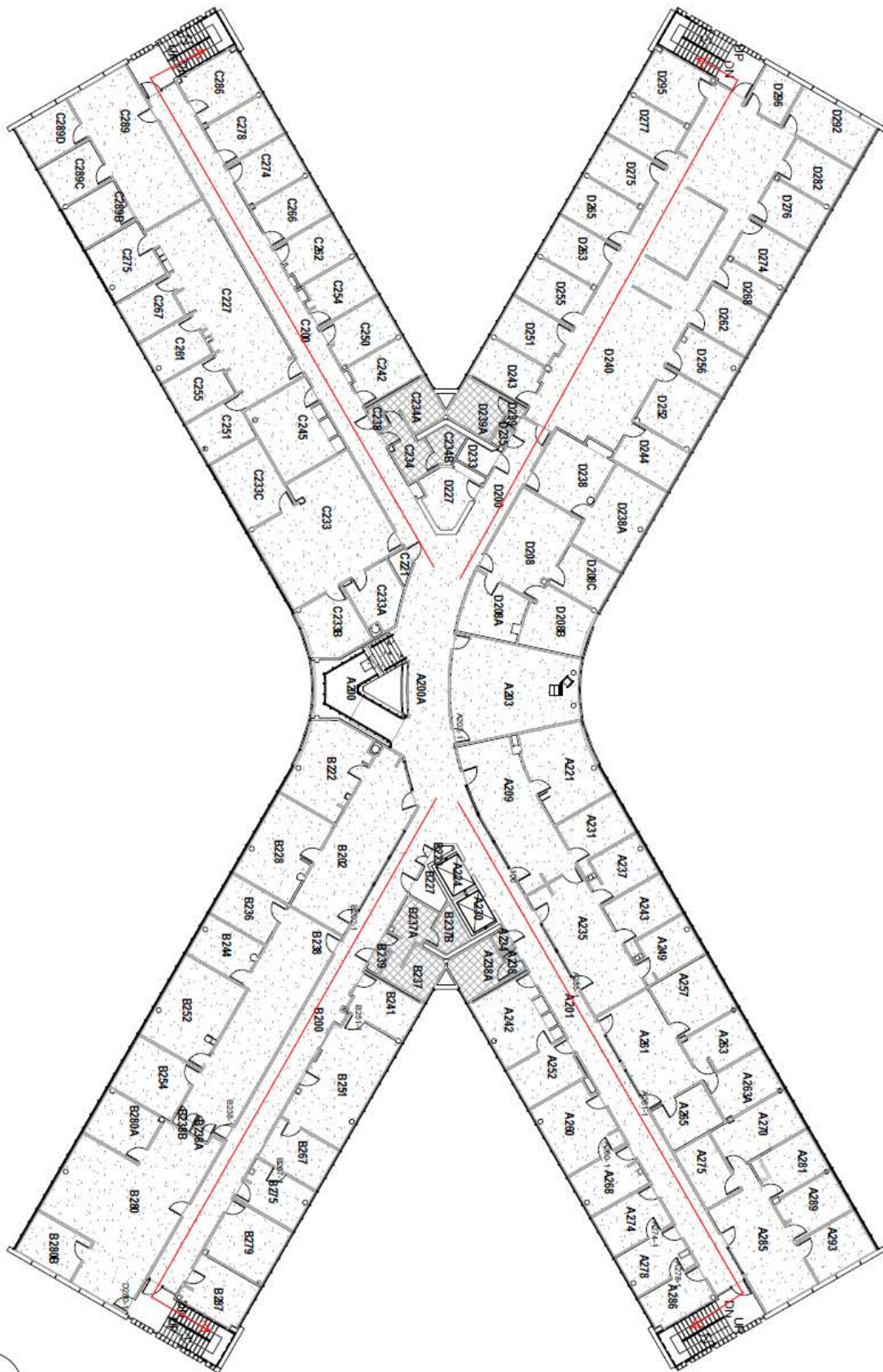




<b>FACILITIES PLANNING</b>	<b>REVIT DATABASE</b>
240 BRWB PROVO, UT 84602	7/1/2014
PHONE: (801) 422-5504	4:05:35 PM

BRIGHAM YOUNG  
UNIVERSITY

<b>ASB</b>
1st Floor



1" = 20'-0"



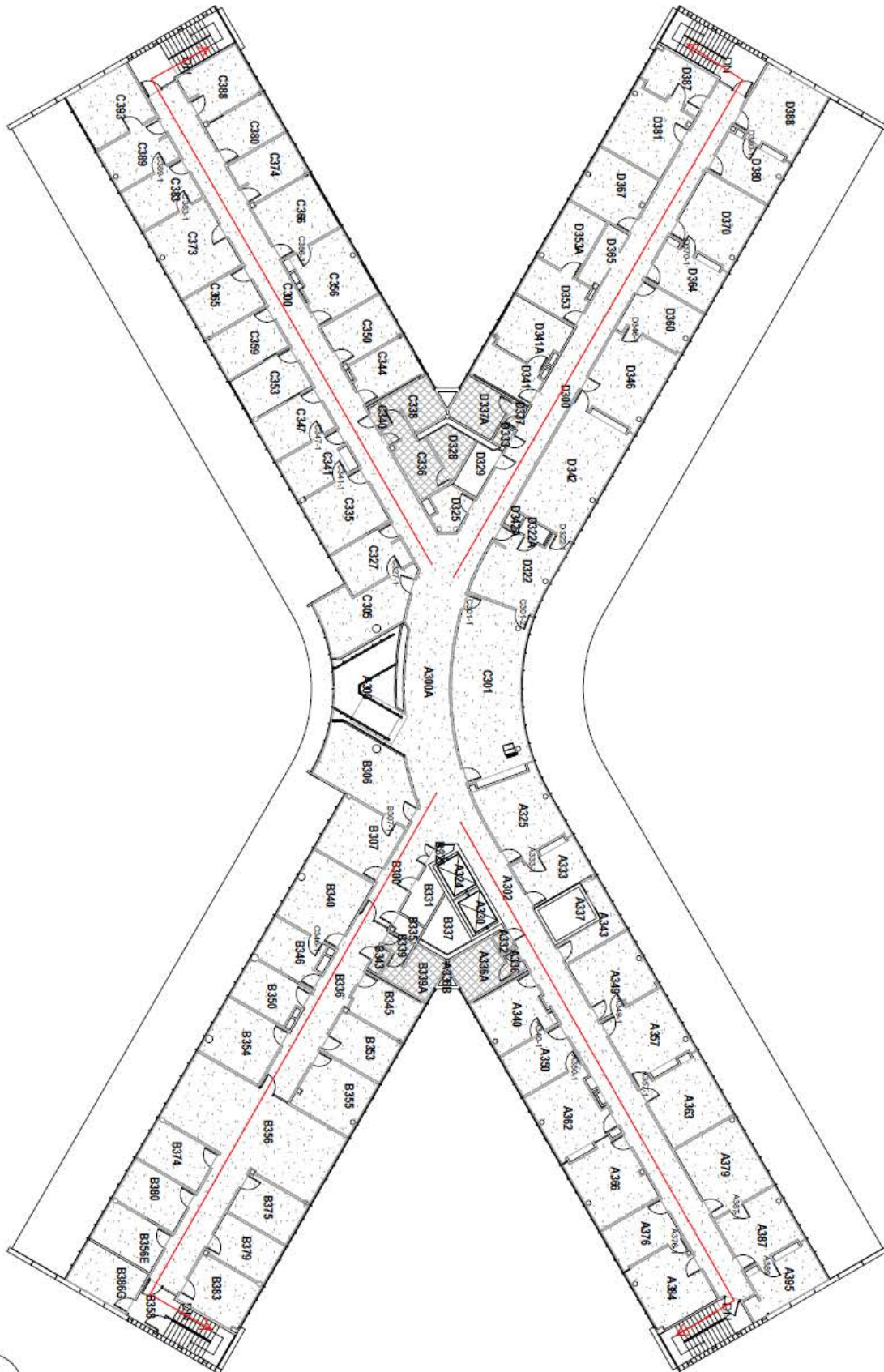
**FACILITIES PLANNING**  
240 BRWB PROVO, UT 84602  
PHONE: (801) 422-5504

**REVIT DATABASE**  
7/17/2014  
4:54:52 PM

**BRIGHAM YOUNG**  
UNIVERSITY

**ASB**  
2nd Floor





1" = 20'-0"



**FACILITIES PLANNING**  
240 BRWB PROVO, UT 84602  
PHONE: (801) 422-5504

**REVIT DATABASE**  
7/1/2014  
4:06:00 PM

**BRIGHAM YOUNG**  
UNIVERSITY

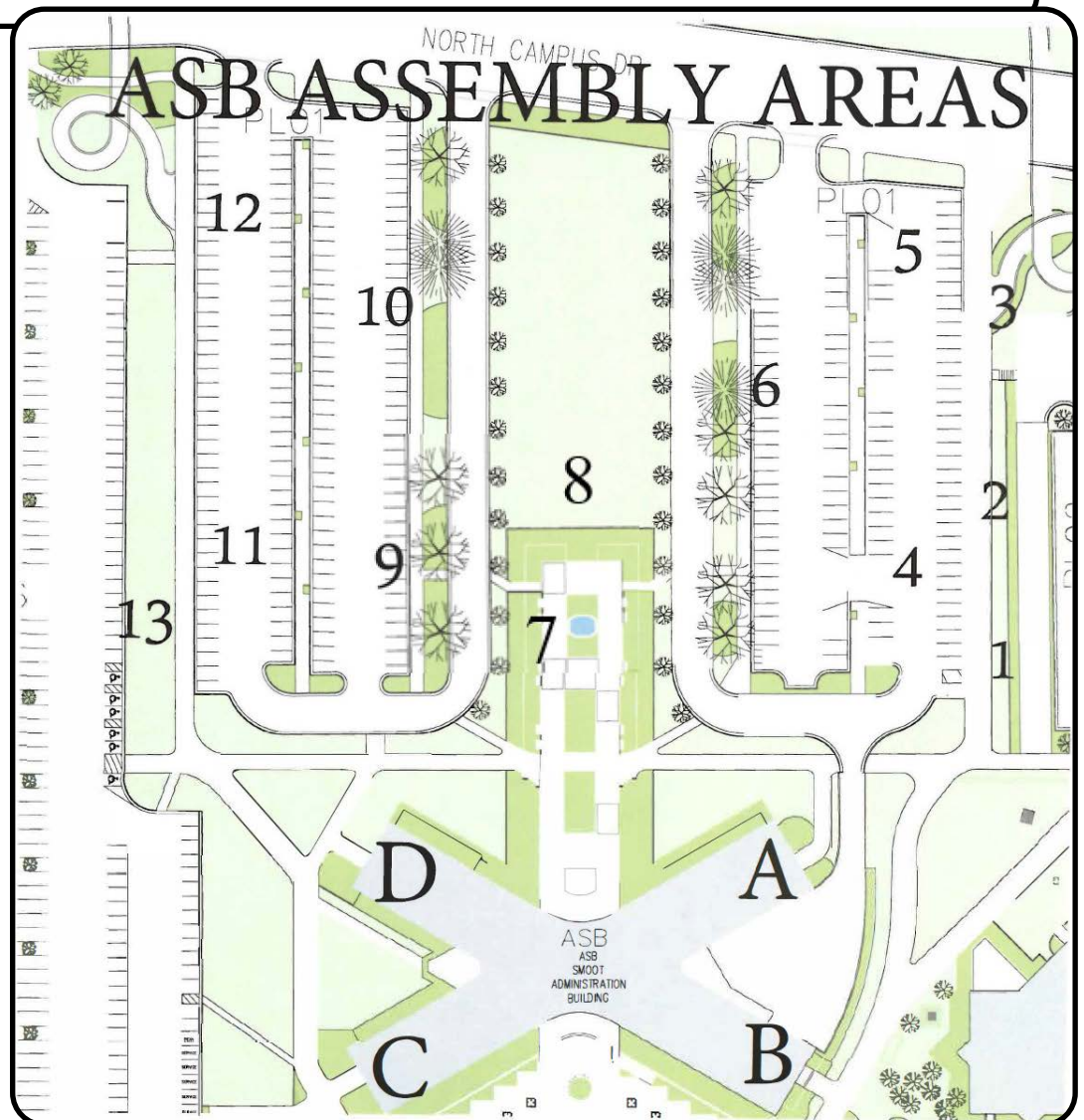
**ASB**  
3th Floor

## 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





Notes