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Welcome Page

Welcome to BYU Financial Services! This booklet is intended to help you get set up and settled in. An online version can be found at finserve.byu.edu/new_student_employee and you can use the links in that version. 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. Their contact info is below.

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

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

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

Watch the welcome to Financial Services video here.

Your Peer Mentor is:

__________________________________
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

1. **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 W-4 information.
   Additional information about payroll can be found at https://finserve.byu.edu/payroll.

2. **Computer Set Up**
   - Click here to order email
   - Contact the CSRs at 2-7890 to set up Outlook, get access to printers, and download the RingCentral app (look at page 11 for more information on RingCentral)

3. **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
   - Update the manager/contact information for Peoplesoft operating units & depts if applicable
   - Student Financials – Email lynette_cummings@byu.edu (name, dept., net ID, access needed)
   - HR Peoplesoft – Email lynette_cummings@byu.edu (name, dept., net ID, access needed)
   - Business Objects – email 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

4. **Building Access**
   Email katy_clark@byu.edu with your netID to request access to the micromarket and perimeter doors (if needed).
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...

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

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.

Division Shirt
If you would like a Financial Services polo shirt, please go to the front desk in A-153. We have several shirts to choose from.

Required Trainings
Be sure to do the following required training within your first 4 weeks of employment. All BYU employees must complete both trainings once per year. Go to training.byu.edu and look for "University Core Training."
- Sexual Harassment Prevention for Employees
- Information Security and Privacy Essentials

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.

Lynette and her student employees will do the following:
- Order a nameplate (when requested)
- Add you to the FS division email list
- Add your email to the division newsletter distribution list

Financial Services will send things to your BYU email, so be sure to look there.
# Dress Code

## Men

<table>
<thead>
<tr>
<th>Category</th>
<th>Requirement</th>
<th>Inappropriate Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shirts</strong></td>
<td>Clean &amp; professional</td>
<td>Sweatshirts, graphic shirts, anything torn/tattered</td>
</tr>
<tr>
<td><strong>Pants</strong></td>
<td>Clean &amp; professional</td>
<td>Shorts, sweats, and wrinkled, worn or tattered pants (no holes)</td>
</tr>
<tr>
<td><strong>Shoes</strong></td>
<td>Clean &amp; professional</td>
<td>Flip-flops, worn/tattered/brightly colored tennis shoes</td>
</tr>
<tr>
<td><strong>Hairstyles</strong></td>
<td>Clean &amp; professional</td>
<td>Extreme hair styles or colors, unshaven. No hats.</td>
</tr>
</tbody>
</table>

## Women

<table>
<thead>
<tr>
<th>Category</th>
<th>Requirement</th>
<th>Inappropriate Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shirts</strong></td>
<td>Clean &amp; professional</td>
<td>Sweatshirts, graphic shirts, anything torn/tattered, anything revealing</td>
</tr>
<tr>
<td><strong>Pants</strong></td>
<td>Clean &amp; professional</td>
<td>Shorts, sweats, leggings/yoga pants, and wrinkled, worn or tattered pants (no holes)</td>
</tr>
<tr>
<td><strong>Dresses and Skirts</strong></td>
<td>Clean &amp; professional</td>
<td>Anything revealing or that doesn’t meet BYU’s standards</td>
</tr>
<tr>
<td><strong>Shoes</strong></td>
<td>Clean &amp; professional</td>
<td>Flip-flops, worn/tattered/brightly colored tennis shoes</td>
</tr>
<tr>
<td><strong>Hairstyles</strong></td>
<td>Clean &amp; professional</td>
<td>Extreme hair styles or colors, unshaven. No hats.</td>
</tr>
</tbody>
</table>

**Piercings:** No more than one per ear

**Inappropriate Piercings:** Excessive ear piercing and all other body piercings

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Always maintain a modest, clean, professional look that also complies with BYU’s Honor Code.

Supervisors are responsible for determining whether their employees are appropriately dressed for their work environment and position duties. If you have a question about whether or not a particular item of clothing is appropriate for work please ask your supervisor.
Examples of Appropriate vs. Inappropriate Clothing Items:

**Shoes – Appropriate**

**Shoes – Inappropriate**
Pants – Appropriate

Pants – Inappropriate
Shirts – Appropriate

Shirts – Inappropriate
### Phone List

<table>
<thead>
<tr>
<th>Financial Services</th>
<th>Purchasing &amp; Travel</th>
<th>Departments</th>
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<tbody>
<tr>
<td>4057</td>
<td>Alan Moose</td>
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<td>Chris Shawcroft</td>
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<td>Admin VP &amp; CFO</td>
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<tr>
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<td>3760</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3760</td>
</tr>
</tbody>
</table>
Phone System

Ordering a Phone Line

Ask your supervisor for help setting up your RingCentral phone line.

Click [here](#) to add a student employee to RingCentral if they do not already have an account. If they are being added to a shared line, include the shared phone number and OIT will add them to that phone line.

- If the student has been set up on RingCentral for a previous job, the supervisor can add them to a shared phone line by going to RingCentral.com and logging in to the admin portal. Click on Call Queue Management on the drop down menu and choose "Settings" and then "Call Handling & Members" where you can add and delete people from your shared 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 Ring Central 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 Ring Central 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

Many student employees use a physical phone, but not all do. If you have a physical phone, you might still want to use the RingCentral app to text or see missed calls. Talk with your supervisor about the best way to answer your phone. Some employees use their cell phone to answer their Ring calls and others prefer to use a device. Please contact Lynette if a device is needed. Student employees use the device shown on the link below.

[Wireless bluetooth earpiece](#)
Treasury Services

David Paul
Treasurer's Office
University Treasurer

Steve Morley
Treasurer's Office
Assist. Treasurer-Banking Ops

Dane Larsen
Treasurer's Office
Assist. Treasurer-Payment Svs

Dallin Fredrickson
Treasurer's Office
University Cash Manager

Tammy Miner
Treasurer's Office
University Vault Supervisor

Brent Shutt
Treasurer's Office
Treasury Services Specialist

Braden Stohlt
Treasurer's Office
Merchant Services Administr

Jon Hardy
Human Resource Info Systems
Cougar Cash Applications Mgr

Sabrina Warren
Treasurer's Office
Univ eComm & Cash Sys Admin
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)
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
Dallin Fredrickson
Dane Larsen
David Paul
Gene McMurtrey
Jon Hardy
Sabrina Warren
Steve Morley
Tammy Miner
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>Office/Room</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAVP Office (Front Desk)</td>
<td>A-153 ASB</td>
</tr>
<tr>
<td>Accounts Payable</td>
<td>B-280 ASB</td>
</tr>
<tr>
<td>Budget</td>
<td>D-208 ASB</td>
</tr>
<tr>
<td>Financial Accounting &amp; Reporting</td>
<td>C-249 ASB</td>
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<tr>
<td>Grants &amp; Contracts Accounting</td>
<td>A-261 ASB</td>
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<td>Payroll</td>
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<td>Student Financial Services</td>
<td>A-153 ASB</td>
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<tr>
<td>Tax Office</td>
<td>B-280 ASB</td>
</tr>
<tr>
<td>Treasury Services</td>
<td>A-153 ASB</td>
</tr>
<tr>
<td>Alan Moose (Asst. Admin VP)</td>
<td>B-355 ASB</td>
</tr>
</tbody>
</table>
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 training options and set some development goals.

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 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. 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.

Devotional & Forum
Employees are encouraged to attend devotional. They are held on Tuesdays at 11am in the Marriott Center. Go to calendar.byu.edu/devotionals-forums for a list of speakers.

Note: All student employees in Financial Services must clock out and leave the office during devotional.
Student Employment Requirements

Student Enrolled Credits
- Go to hrs.byu.edu/requirements-for-student-employees for information on the number of credit hours you are required to take in order to work.
- Current U.S. Citizen employees who are graduating may work up to 2 weeks after their graduation date.

Affordable Care Act
- Students are required to maintain an average of 28 hours per week during a measurement period.
- Measurement Period:
  - Current Employees: October – October
  - New Employees: Hire date-Hire date, after one year it shifts to October – October

- Fall/Winter: BYU policy requires that students work no more than 20 hours per week
- Spring/Summer: Students may work up to 40 hours as long as their average stays below 28 hours a week for the measurement period
- Employees hired during the summer are eligible to work for up to 40 hours as it is anticipated that they will drop to 20 hours per week in the fall which will drop their average for the measurement period.

Note: If an employee quits and is hired in another department or by any entity owned by The Church of Jesus Christ of Latter-day Saints before 6 months is up, they will pick up the average they left off with.

If a student exceeds the amount of hours they are permitted during a measurement period, they will automatically be terminated and will have to wait 6 months before they can be re-hired by any church owned organization.

International Student Employees
Please be very careful to follow the guidelines found at hrs.byu.edu/international-students. Be sure to stay under 20 hours/week. If you have any concerns, please talk to your supervisor or Lynette.

More information can be found at hrs.byu.edu/student-employees.
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 & Controllership
- 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.

- Cougar Cash
- Financial Services
- My Financial Services
- Personal Information
- View Paycheck
- W-2 View/Print, Consent
- University Org Chart
- University Policies/Procedures
- UTA Bus Pass

Things to review:
Who to Contact page located at finserve.byu.edu/contact
Procedures located at 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. 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

Y-Time

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

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

All student employees should ONLY punch in or out inside the ASB. If you forget to punch, wait until the next time you come to work and punch in/out at the correct time. After you punch again, the app will allow you to add your missed punch. If you have issues, please work with your time manager.

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