

Brigham Young University • New Employee Information Book

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 website. An online version can be found at [finserve.byu.edu/Financial Management/CFO & Controllership/New Staff Employee](http://finserve.byu.edu/Financial%20Management/CFO%20&%20Controllership/New%20Staff%20Employee) 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:

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.

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.

1

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 in Workday

- Update work, home, & emergency contact information (View Profile/Actions/Personal Data)
- Be sure to add emergency contact info

2

HR Website

Go to hrs.byu.edu for information about DMBA, financial planning, university wellness activities and much more. Click on “Current Employee” to find a lot more useful information about training & development, paid holidays, employment verification, maternity & paternity leave, etc.

Click [here](#) to join a hobby group.

3

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>.

4

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 (filter.byu.edu)
- Password resets
- And much, much more...

5

ID Card Tips

- New employees will be able to get an ID card one day after all hiring processes are completed.
- 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

- Email will appear on your personal information page after it is set up. Get more info [here](#).
- Manage email alias at alias.byu.edu
- Have Crash Plan set up on your computer to back it up
- Get access to printers
- Go to software.byu.edu to download software
(The licences allow for use on 2 computers, including personal computers.)

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.)

- Workday - Go to workday.byu.edu for all Workday resources
- Box – Contact the director over your area for access
- Student Financials – Email lynette_cummings@byu.edu (name, dept., net ID, access needed)
- Transact – Click [here](#) for the application
- AIM (Registrar’s Office) – 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.



Building Access

Email 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 and envelopes. 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 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 for information on the BYU brand and logos
- Ask Lynette for the Financial Services logos if you need them

FYI: When you replace batteries at BYU you are not allowed to throw the old ones away. Take them to the front desk in A-153 to be recycled.

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

Join us for the 10 & 3 walks

Meet in the lobby at 10am & 3pm to get outside and take a 15 minute walk with fellow employees.

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](#)
- [Style D](#)
- [Style E](#)

Men's Shirts:

- [Style A](#)
- [Style B](#)
- [Style C](#)
- [Style D](#)



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 finance operations 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 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

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.

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
 7061 Amy Foote
 9766 Andrew Neil
 6218 Andy Cluff
 2272 Braden Stohlton
 4259 Brandon Dailey
 4878 Brent Shutt
 4023 Brian Blum
 2929 Cherylnn Aamodt
 1538 Chris Shawcroft
 6534 Connor Brown
 2734 Corbin Emerick
 7125 Cyndi Sederholm
 8309 Dallin Fredrickson
 3708 Danae Hamilton-Whitcomb
 5716 Dane Larsen
 7548 David Morris
 4887 David Paul
 6590 Emily Hardy
 5259 Erik Busath
 6634 Glenda Tolman
 6762 Heather Toponce
 2694 Jake Henderson
 4831 Janelle Wilson Simpson
 3693 Joel Christensen
 John Clark
 7785 John Leatherwood
 6943 Jon Hardy
 2009 Kali McCleary
 8025 Kathleen Rugg
 6639 Kevin Walker
 1292 Kim Stringham
 2080 Larry McFerson
 1625 Lori Glenn
 8308 Lorile Howard
 3662 Lynette Cummings
 4436 Marshall Chamberlain
 6641 Marva Yapias
 6220 Nancy Wilson
 6591 Pam Wilson
 6630 Paul Larsen
 4703 Rebecca Harrison
 6721 Ryan Wells
 4759 Sabrina Warren
 3784 Salani Pita
 7567 Shannon Kelly
 6221 Shelby Barney
 2004 Sheri Sechler
 3847 Spencer Young
 7648 Steve Morley
 2914 Tammy Miner
 3707 Temo Altamirano
 5996 Terilee Hutchings
 7694 Tiffany Hawkins

Purchasing & Travel

4028 Alison Lopez
 Annie Jensen
 5125 Annette Landon
 7014 Brian Ewell
 2906 Brian Marks
 7003 Bruce Roden
 0184 Carter Brown
 0548 Cindi O'Neill
 5566 Dean Shupe
 7173 Debbie Hall
 2925 Eric Smith
 4127 Erin Howe
 5636 Galilee Poulson
 4702 Garlan McCoy
 3727 Ginger Miller
 0887 Heather Hughes
 0887 Jaelynn Christensen
 5290 Jake Packer
 0775 Janna Gordon
 7009 Jeff Moss
 3998 Julie Ann Zarbock
 7160 Karen Brereton
 7015 Kelly Taylor
 8009 Kirstin Abbott
 8590 Kristi Nelson
 7129 Kristina Baardson
 3258 Lei Liua
 8026 Lori Sowards
 7036 Lynette McCoy
 3895 Marci McIntosh
 7011 Megan Goodman
 7010 Park Romney
 5060 Paul Anderson
 7313 Paul Buckner
 2920 Peter Esera
 0176 Rachel Gunnell
 7006 Roland Nelson
 0090 Sarah Toller Hoffman
 5645 Shannon Tuckett
 8027 Susan Walters
 3972 Tammy Merrill
 7004 Todd Mortensen
 6152 Trevor Boulter
 3472 Tyler Hansen
 9371 Wendy Baumgarten

Admin VP & CFO

3760 Katy Clark
 3760 Steve Hafen

Departments

ASB Numbers

4840 ASB Custodian
 4833 ASB Custodian
 4418 Lobby Receptionist

Accounts Payable

3845 Accounts Payable
 3847 Check Processing

Asset Management

3418 Asset Mgt Student

Budget Office

3693 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
 2611 Housing (campus)
 4701 Petitions (Tuition)
 2631 Registration
 4104 Scholarship Office
 2650 -Dept & Univ
 5040 -Off Campus
 6434 -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
 7227 Jane Fonua
 7075 D-148 Receptionist

Student Financial Services

6629 1098T Questions
 6762 Collections
 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 Joseph Conner (CSR)
 9596 Mark Wright
 801-360-9191 (cell)
 8353 Eric Hansen
 801-372-0485 (cell)
 Frank Staheli
 801-420-7689 (cell)

Enterprise Solutions

7975 Chad Feilbach
 7900 Cam Pitcher
 8062 Craig Larson
 1126 David Horne
 385-335-0045 (cell)
 8123 David Nichols
 6628 Ed McCracken
 1553 Jeff Arnell
 2623 Jennifer Lund
 0666 Jill Hacker
 7396 Leslie Toone
 8626 Levi Smith
 7809 Mark Madsen
 801-404-1641 (Cell)
 1292 Michael Blackhurst
 7803 Patrick Vincent
 801-404-7823 (Cell)

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
- 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 user

Click [here](#) to do the following or contact 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. The devices we have been ordering for employees are listed below.

[Wireless bluetooth earpiece](#)

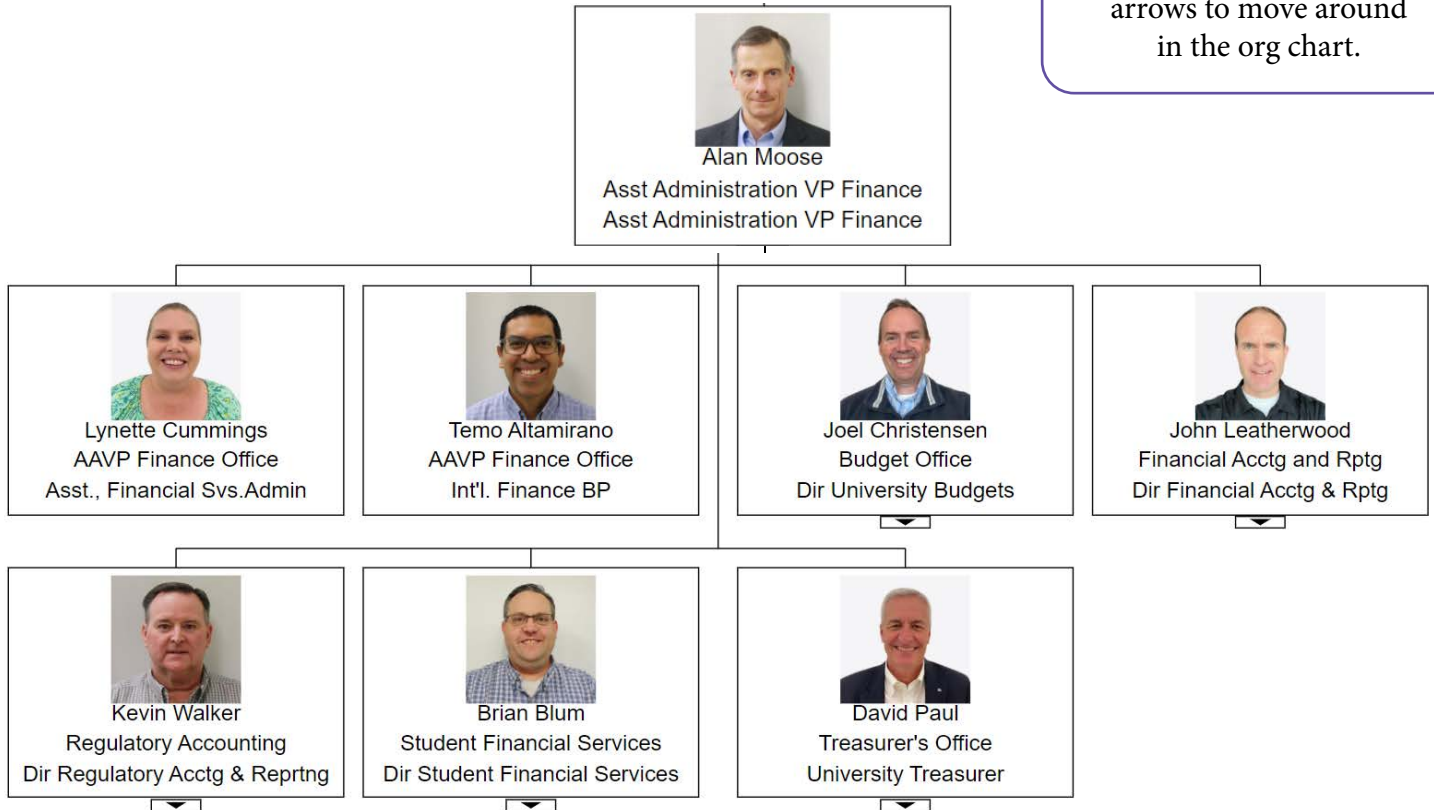
[Sony earbud headphones](#)

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

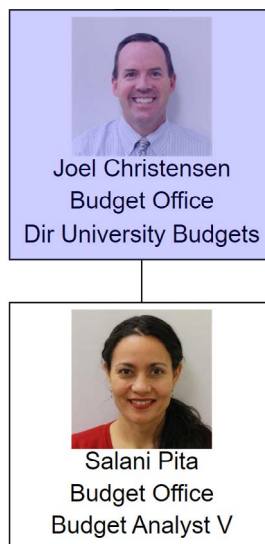


Org Charts

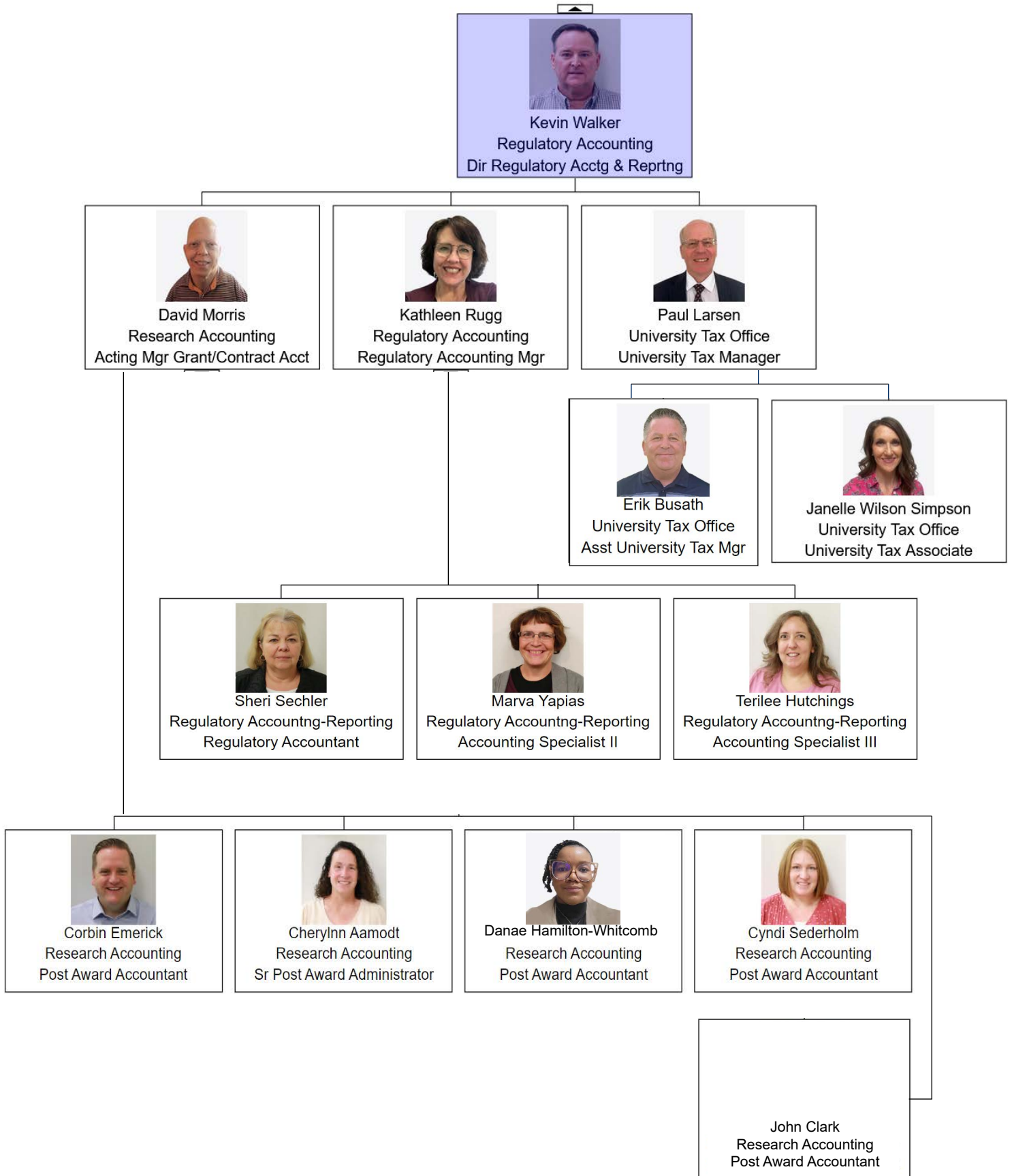
To see the full University Org Chart (with student employees), go to Workday, click on your profile and then your team and use the arrows to move around in the org chart.



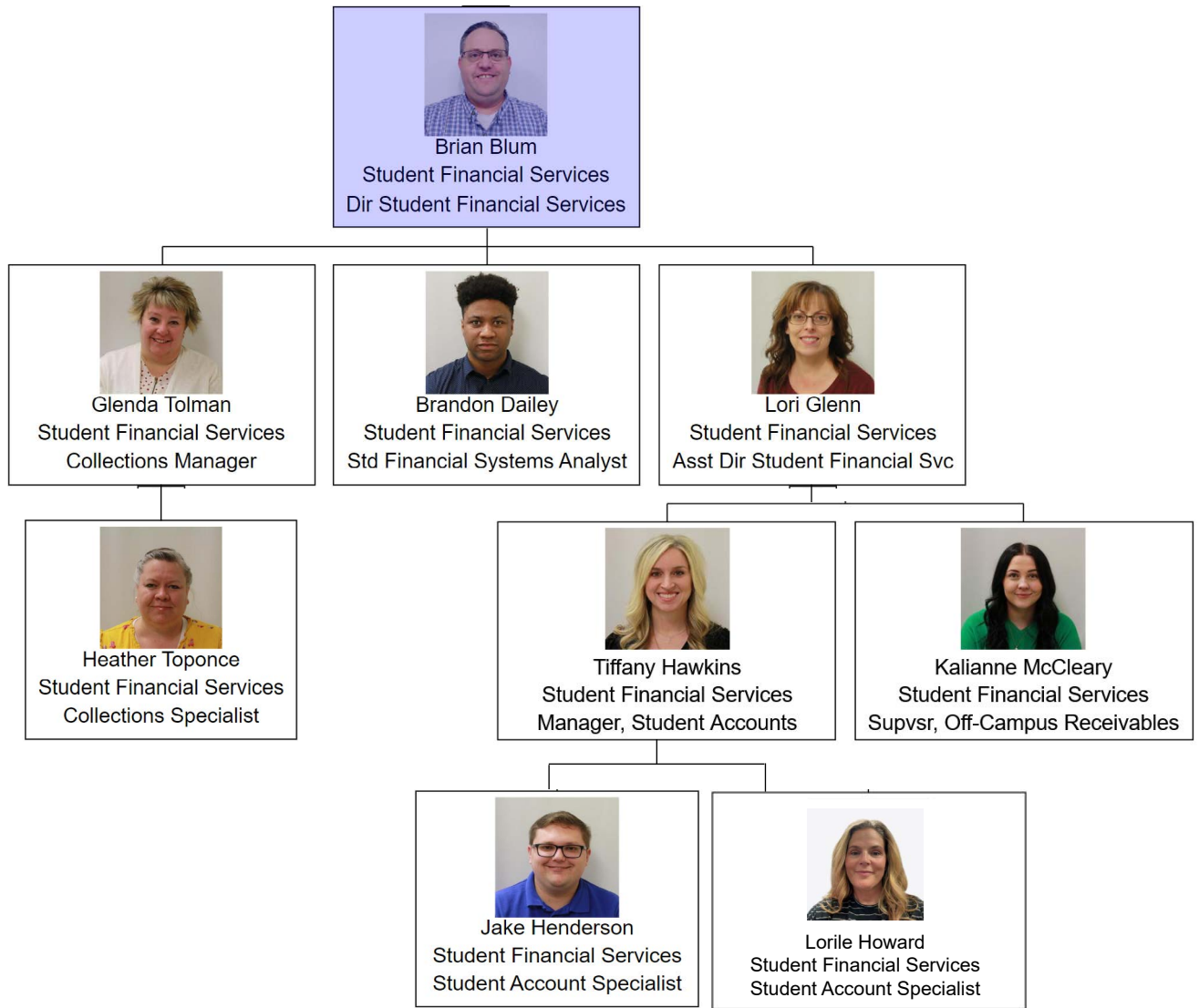
Budget



Regulatory Accounting



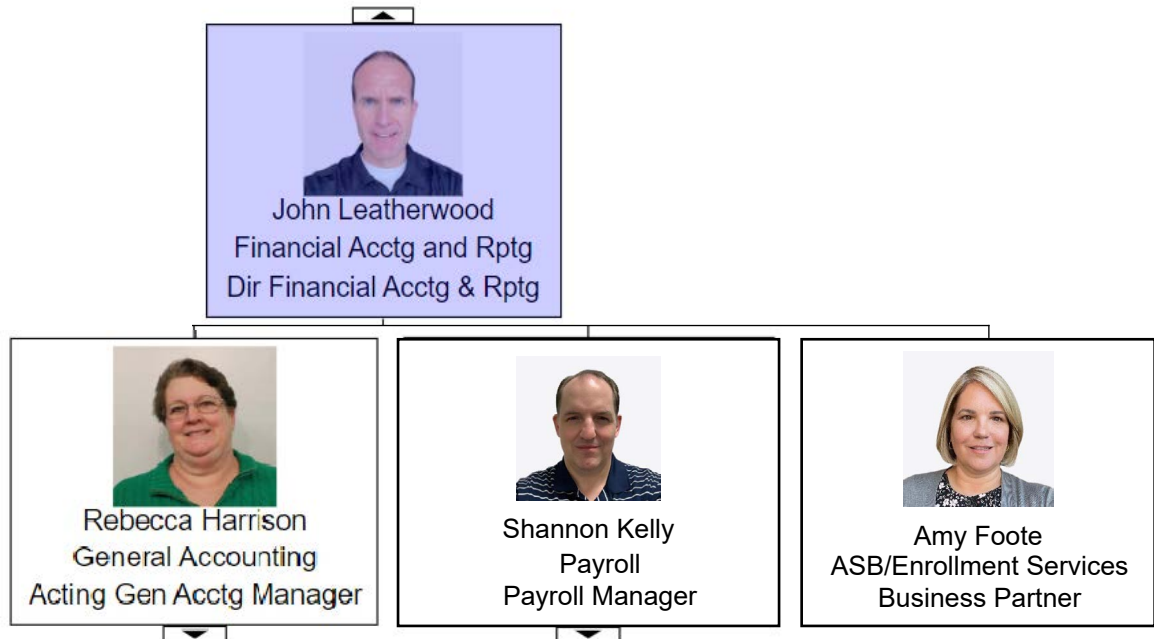
Student Financial Services



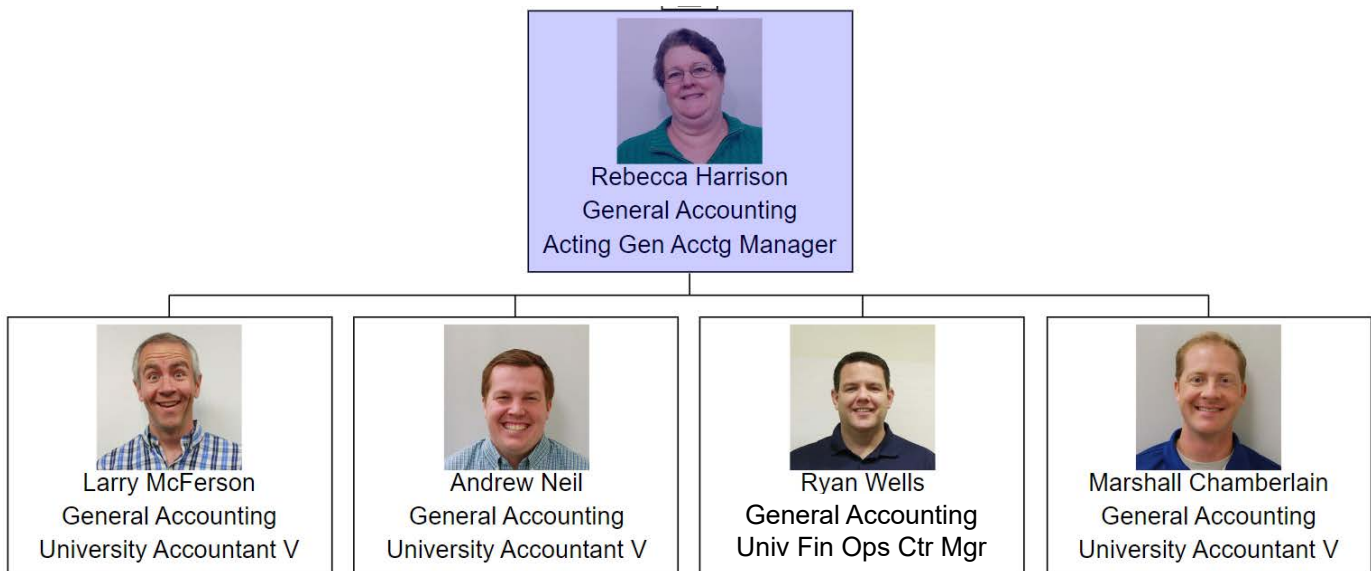
Treasury Services



Financial Accounting & Reporting



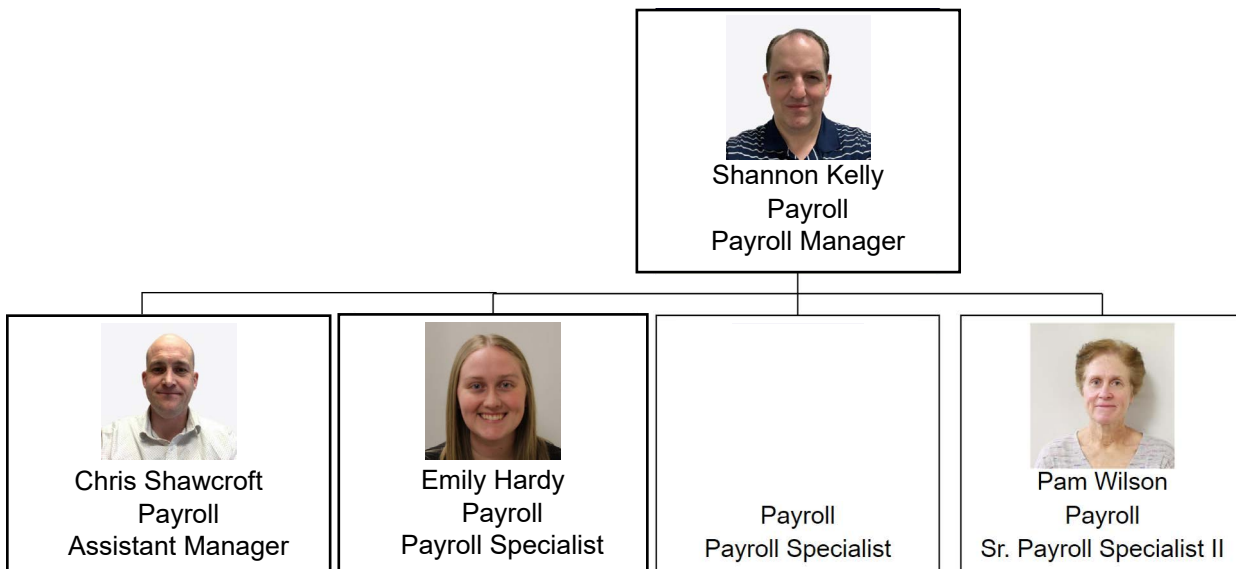
General Accounting



Accounts Payable & Finance Operations Center



Payroll



Office Locations

AAVP Office

Alan Moose (B-355 ASB)
Lynette Cummings (A-153 ASB)
Temo Altamirano (D-208A)

Accounts Payable (B-280)

Nancy Wilson
Shelby Barney
Spencer Young

Administration VP (B-346)

Katy Clark
Steve Hafen

Budget (D-208)

Joel Christensen
Salani Pita

Financial Accounting & Reporting

John Leatherwood (B-353)
Amy Foote (C-148)

General Accounting (C-249)

Andrew Neil
Larry McFerson
Marshall Chamberlain
Rebecca Harrison
Ryan Wells
Sabrina Warren

Grants & Contracts Acctg (A-261 ASB)

Cherylnn Aamodt
Corbin Emerick
Cyndi Sederholm
David Morris
Danae Hamilton-Whitcomb
John Clark

Payroll (D-55)

Chris Shawcroft
Emily Hardy
Pam Wilson
Shannon Kelly

Regulatory Acctg & Reporting (C-233)

Kathleen Rugg
Kevin Walker
Marva Yapias
Sheri Sechler
Terilee Hutchings

Student Financial Services (A-153)

Brandon Dailey
Brian Blum
Glenda Tolman
Heather Topance
Jake Henderson
Kali McCleary
Lori Glenn
Lorile Howard
Tiffany Hawkins

Tax Office (B-280 ASB)

Erik Busath
Janelle Wilson Simpson
Paul Larsen

Treasury Services (A-153)

Braden Stohlton
Brent Shutt
Connor Brown
Dallin Fredrickson
Dane Larsen
David Paul
Jon Hardy
Kim Stringham
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

Regulatory Accounting & Reporting – C-233 ASB

Accounts Payable – B-280 ASB

Student Financial Services – A-153 ASB

Budget – D-208 ASB

Tax Office – B-280 ASB

Financial Accounting & Reporting – C-249 ASB

Treasury Services – A-153 ASB

Grants & Contracts Accounting – A-261 ASB

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

Payroll – D-55 ASB

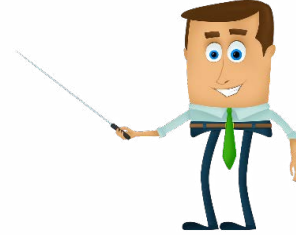


Professional Development

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 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 [Workday Learning](#).

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. Online courses are a great investment in your development!

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.

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.

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 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. You will receive an email when a forum is scheduled.

Finance Operations Group

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 2 weeks of employment. All BYU employees must complete both trainings once per year. Go to myworkday.com/byu/learning and look for "University Core Training."

- Sexual Harassment Prevention for Employees
- Information Security and Privacy Essentials

BYU Employee Development

Go to <https://hrd.byu.edu/edp> to learn more about the Employee Development Program.



OPAC

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

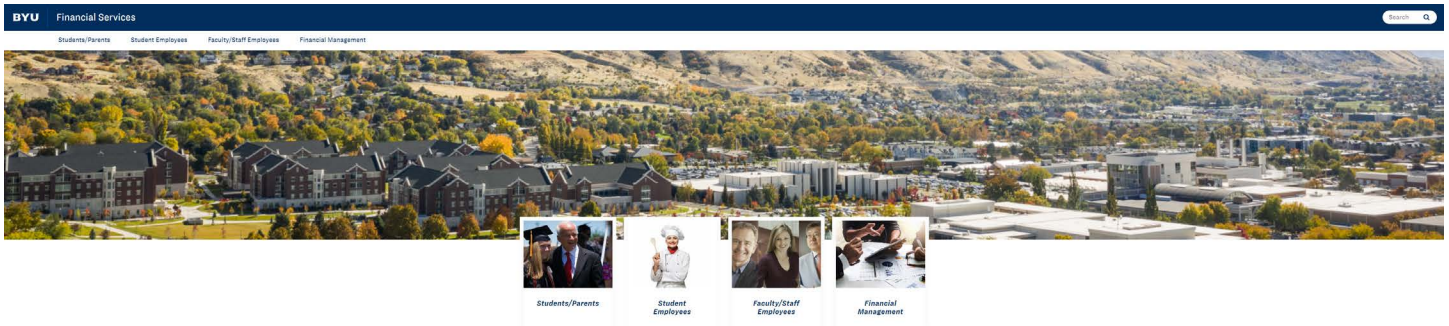
- Promote excellence by providing opportunities for networking, recognition, and exchange of ideas
- To encourage individual and professional growth

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.



FS Webpage



Financial Services Web Page

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

MyBYU 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
- University Policies/Procedures
- UTA Bus Pass
- Cougar Cash
- Email Alias Manager
- Financial Services
- My Financial Center
- Personal Information
- Simply Travel

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:

- 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 [Staff Employment Policy](#)
- o [Staff Employee Leaves Policy](#)
- o [Staff Employee Discipline Policy](#)
- o [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 Exempt Staff Policy](#)
- o [Surplus Property Policy](#)
- o [Travel Policy](#)
- o [University Fund Raising Policy](#)
- o [University Personnel Tuition Policy](#)
- o [Workweek for Employees Policy](#)

Workday

Most Financial Services employees, will do their work in Workday. Go to <https://workday.byu.edu/> to log in. You can find the following items in Workday, along with much more.

- Time & Absence Reporting
- Benefits & Pay
- Career Hub
- Expenses Hub
- Talent and Performance
- University Org Chart

Job Aids can be found at <https://workday.byu.edu/eu-job-aids>

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_B52)
- 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 to schedule the Hinckley Center

Go to 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 Cougarat
- 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 Cougarat 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. You can order from campus locations using the BYU app.
 - ⇒ Another less known location is the Pendulum Court Café which is run by the students studying Dietetics. 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
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
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
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

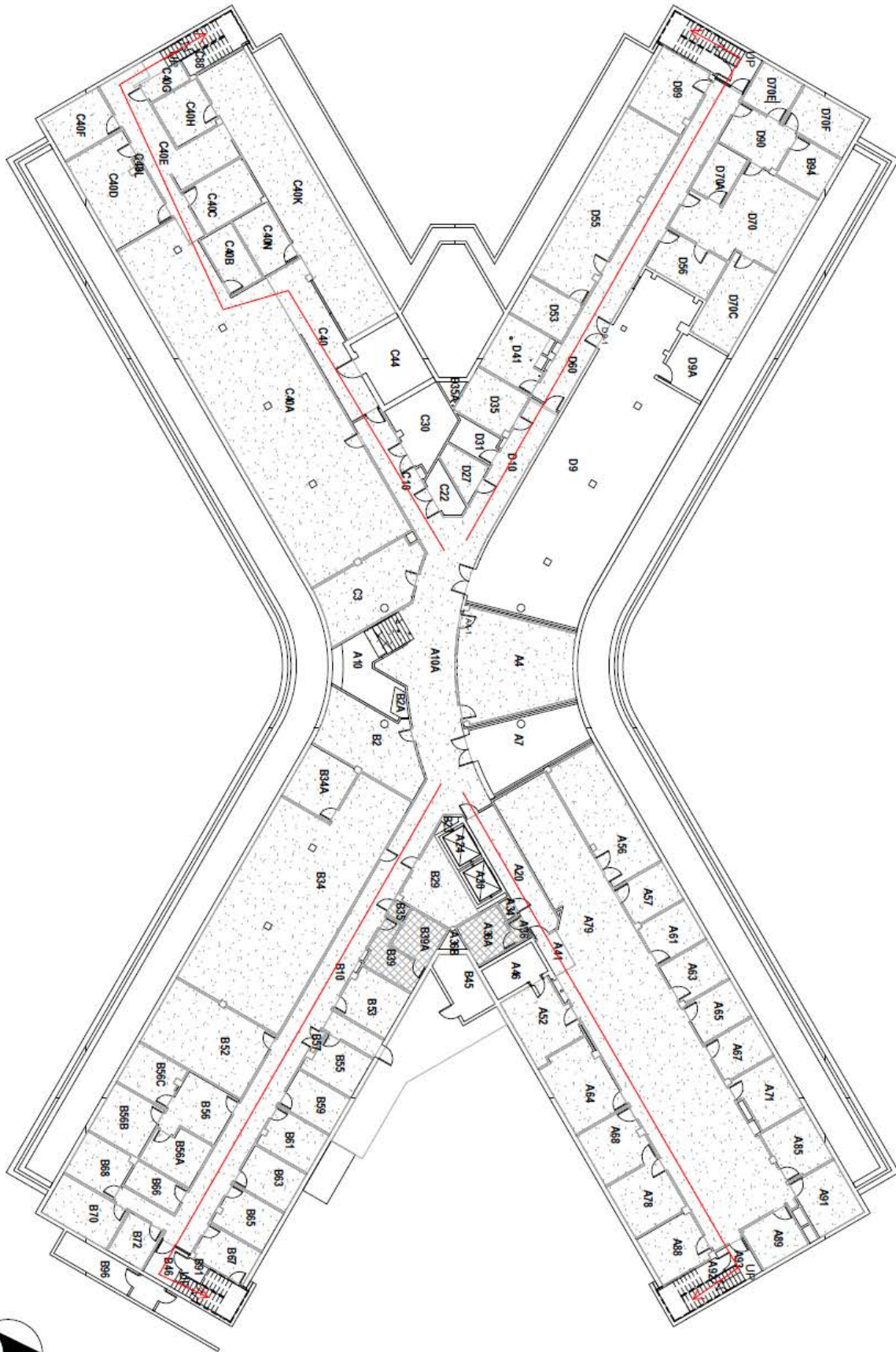
ASB General Evacuation Instructions

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"

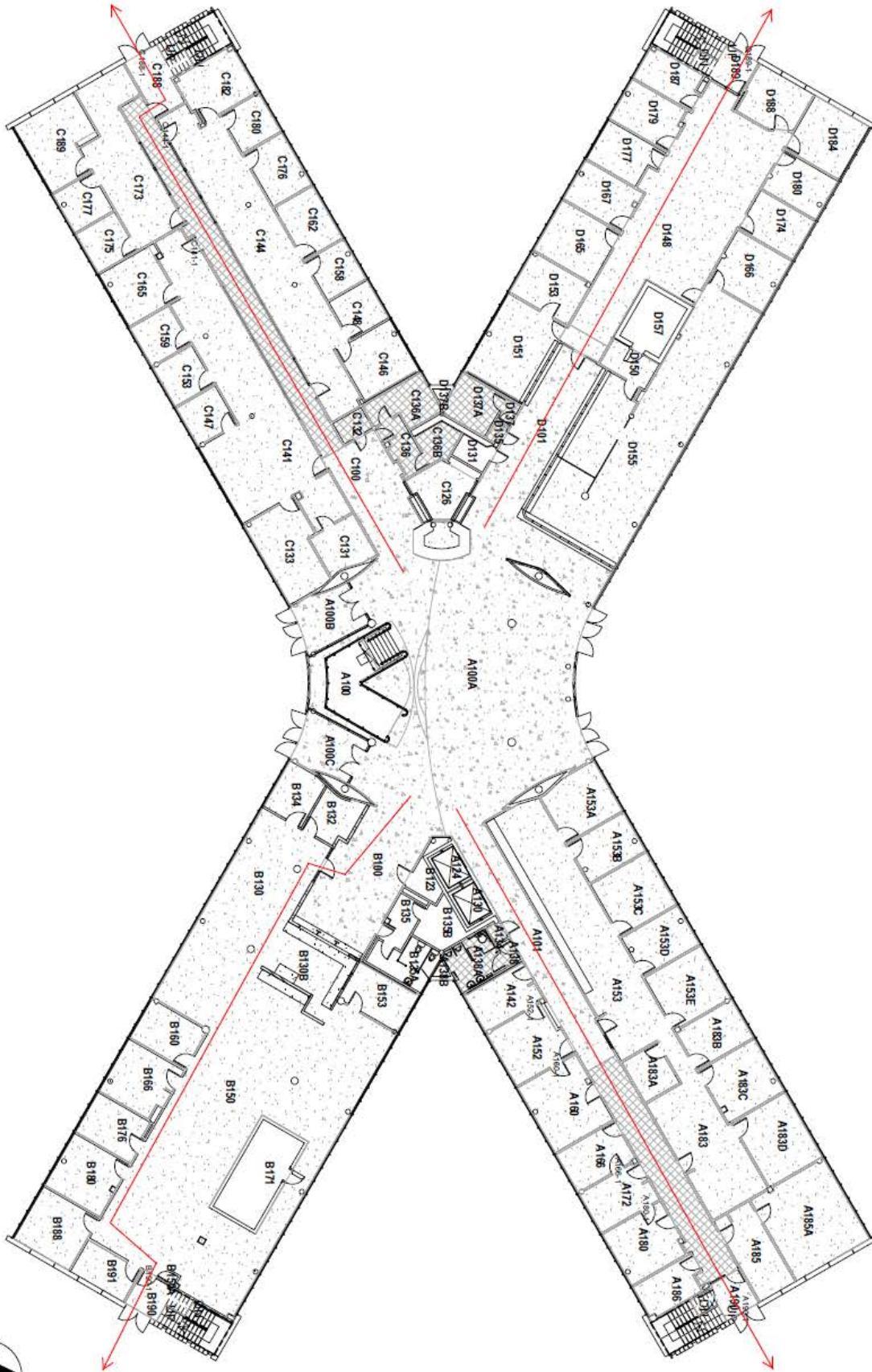


FACILITIES PLANNING
 240 BRWB PROVO, UT 84602
 PHONE: (801) 422-5504

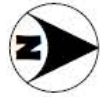
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 4:06:12 PM

BRIGHAM YOUNG
 UNIVERSITY

ASB
 Basement



1" = 20'-0"

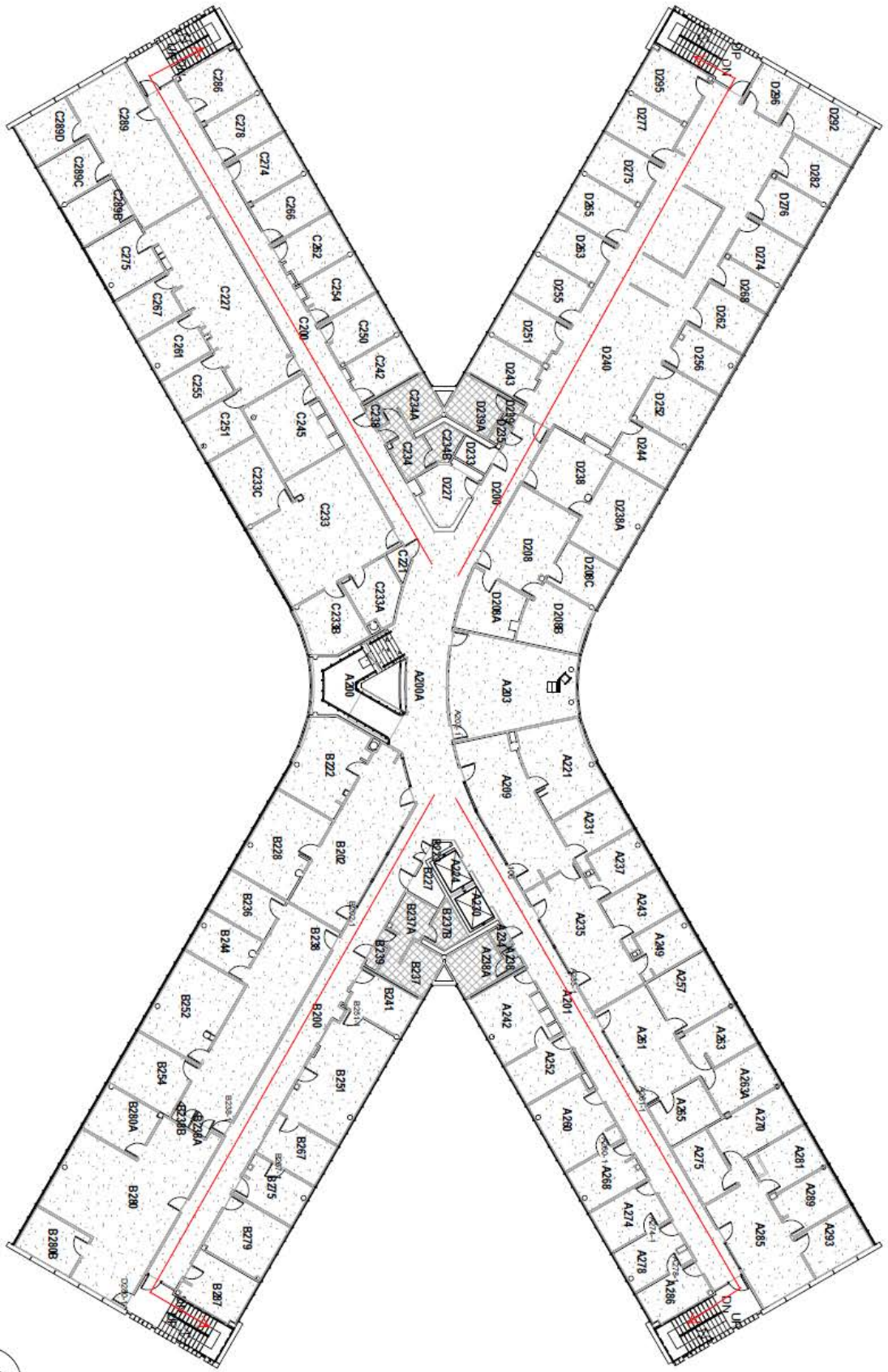


FACILITIES PLANNING
 240 BRWB PROVO, UT 84602
 PHONE: (801) 422-5504

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BRIGHAM YOUNG
 UNIVERSITY

ASB
 1st Floor



1" = 20'-0"



FACILITIES PLANNING	REVIT DATABASE
240 BRWB PROVO, UT 84602	7/17/2014
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BRIGHAM YOUNG
UNIVERSITY

ASB
2nd 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

