New Employee Information Book

BYU Financial Services





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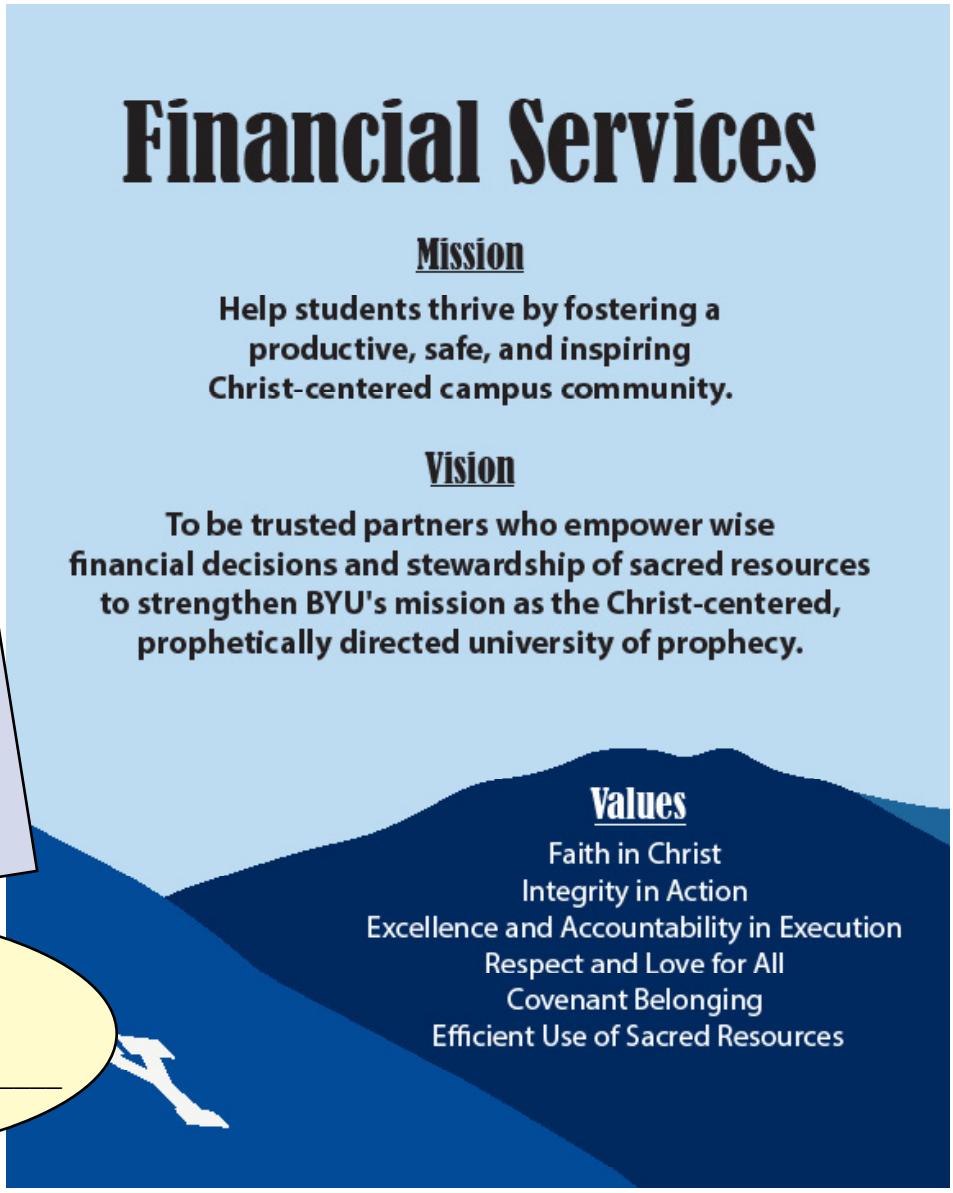
Welcome Page

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 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: 112 ECCB
Phone #: 2-3662

Lynette's Student Employees
Email: financialservices@byu.edu
Office: 112 ECCB
Phone #: 2-4701



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

Welcome Page

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

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

2

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 to Y-Alert (https://emergencymanagement.byu.edu/)

Staff employees are approved to attend one official university sponsored wellness event per month during work hours (up to one hour, with manager approval) and be paid for that. Click here to see events and offerings. You can attend additional wellness events off the clock.

3

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.

4

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.

5

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...

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.

6

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
- 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.

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.)

- Workday – Go to workday.byu.edu for all Workday resources. Check out the "Get Started" and "resources" links.
- 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.

8

Building Access

Email katy_clark@byu.edu with your netID to request ECCB/ECNB building access (request after hours door 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 112 ECCB. 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 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
- Financial Services logos can be found here

FYI: When you replace batteries at BYU you are not allowed to throw the old ones away. Take them to 112 ECCB 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. Lunch room options
10. Q&A

First Aid
All types of first aid supplies are available in the storage room on the stage in 132S ECCB (just inside the door to the left). A difibrilator is available at the west entrance of ECCB.

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

Join us for the 10 & 3 walks
Meet in the ECCB main hall at 10am & 3pm to get outside and take a short walk with fellow employees.

You should receive $50 that can be used to purchase BYU swag. If you would like to have the Financial Services logo stitched to any apparel you purchase, we would be happy to have that done for you. Contact Lynette.

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

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

Annual Activities Council

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

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.

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.

Division Meetings Council

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

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

Also...

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

Dress Code

Business Casual Attire

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

Although this dress standard is less formal than traditional business attire, employees' clothing must be in good taste and positively reflect the university's image. Always maintain a clean, modest, and groomed professional look. Below are some guidelines to help describe what is considered appropriate business casual attire. Keep in mind the "business" part of business casual. If you need an exception to the dress code, please work with your supervisor.

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



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
4259	Brandon Dailey
4878	Brent Shutt
4023	Brian Blum
0462	Carri Ward
2929	Cherylnn Johnson
1538	Chris Shawcroft
6534	Connor Brown
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
6641	Francel Hooke
6634	Glenda Tolman
5070	Heather Parcell
6762	Heather Toponce
4831	Janelle Wilson Simpson
4069	Janice Foutz
7840	Jason Allphin
3693	Joel Christensen
0631	John Clark
7785	John Leatherwood
6943	Jon Hardy
2009	Kali McCleary
8025	Kathleen Rugg
1292	Kim Stringham
	Kyle Rushton
2080	Larry McFerson
0046	Lemikki Westlund
1625	Lori Glenn
0421	Lydia Moyer
3662	Lynette Cummings
7035	Mariah Brustad
4436	Marshall Chamberlain
7901	Michael Burr
6220	Nancy Wilson
1713	Nellie Ashby
6591	Pamela Wilson
6630	Paul Larsen
4703	Rebecca Harrison
6721	Ryan Wells
4759	Sabrina Warren
3784	Salani Pita
7567	Shannon Kelly
6221	Shelby Barney
7648	Steven Morley
2914	Tammy Miner
3707	Temo Altamirano
5996	Terilee Hutchings
7694	Tiffany Hawkins
3560	Troy Galbraith
8799	Whitney Jensen

Purchasing & Travel

4028	Ali Lopez
5125	Annette Landon
8554	Annie Jensen
7014	Brian Ewell
2906	Brian Marks
7003	Bruce Roden
0548	Cindi O'Neill
5566	Dean Shupe
7173	Debbie Hall
4159	Emilio Barrios
8578	Emily Read
2925	Eric Smith
0040	Erin Howe
0593	Erin Ricks
5636	Galilee Poulson
4702	Garlan McCoy
3727	Ginger Cutler
0887	Heather Hughes
6653	Ivey Davies
6116	Jaelynn Christensen
5290	Jake Packer
0775	Janna Gordon
7009	Jeff Moss
6662	Jennifer Lemalu-Meredith
0315	Josh Boettcher
3998	JulieAnn Zarbock
7160	Karen Brereton
7015	Kelly Taylor
9092	Kelly Van Sickle
8009	Kirstin Abbott
8590	Kirsti Nelson
7129	Kristina Baardson
3258	Lei Liua
8026	Lori Sowards
7036	Lynette McCoy
3895	Marci McIntosh
7011	Megan Goodman
5060	Paul Anderson
7313	Paul Buckner
2920	Peter Esera
0176	Rachel Gunnell
0090	Sarah Toller Hoffman
5645	Shannon Tuckett
2272	Shauna Mertz
8027	Susan Walters
3972	Tammy Merrill
3023	Teri Walker
2909	Tevita Ruiz
9083	Tiffany Barney
6152	Trevor Boulter
3472	Tyler Hansen
9371	Wendy Baumgarten

Admin VP & CFO

3760	Katy Clark
3760	Steve Hafen

Departments

ECCB/ECNB Numbers

4840	Custodian
4833	Custodian
4418	Bldg Receptionist

Accounts Payable

3845	Accounts Payable
3847	Check Processing

Asset Management

3418	Asset Mgt Student

Budget Office

3693	Budget

Financial Services

4701	AAVP Office
0241	Fax

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	WSC in person appt

Student Financial Services

6629	1098T Questions
6762	Collections
7549	Off Campus Receiv
3874	Stud Fin Students
3874	SFS Uploads

Treasury Services

6534	Agency Accounts
7806	Deposit Window
7767	Deposits
8309	Wire Transfers

IT Services

4000	Computer Sprt (OIT)
7890	Computer Sprt (CSR)
1936	Joseph Conner (CSR)
	Frank Staheli
	801-420-7689 (cell)
1878	Russ Scadden

Enterprise Solutions

5379	Ashlyn Lewis
7975	Chad Feilbach
7900	Cam Pitcher
8062	Craig Larson
1126	David Horne
	385-335-0045 (cell)
8123	David Nichols
3086	Dia Beck
6628	Ed McCracken
1553	Jeff Arnell
2623	Jennifer Lund
0666	Jill Hacker
7396	Leslie Toone
8626	Levi Smith
5163	Lindsy May
7809	Mark Madsen
	801-404-1641 (Cell)
1292	Michael Blackhurst
7803	Patrick Vincent
	801-404-7823 (Cell)
3198	Rob Cook
0198	Sean Huff

Human Resources

3312	Emily Smith (HR rep)
3562	HR Operations Center

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

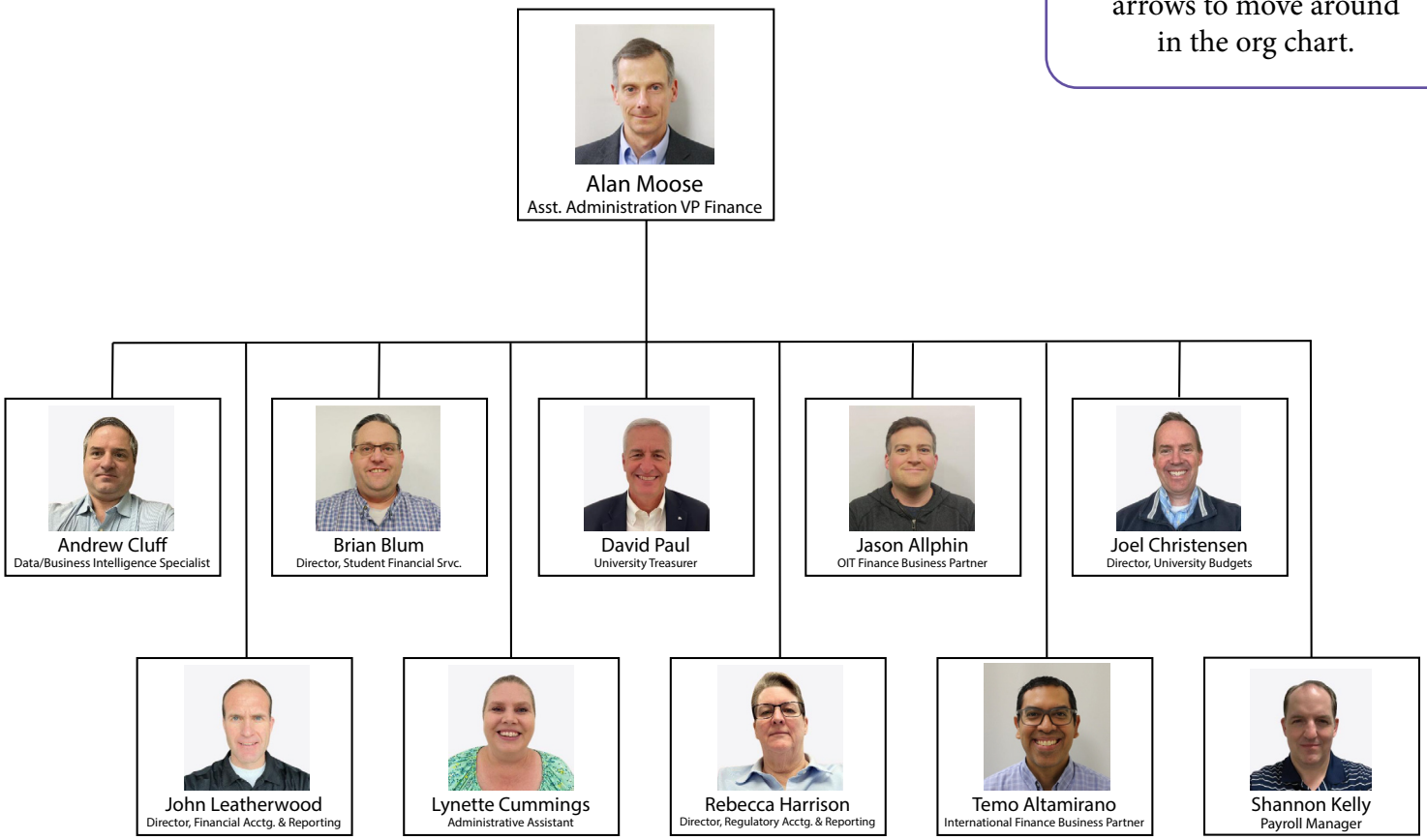
Answering Devices

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. You can also purchase your own device and be reimbursed up to $60.

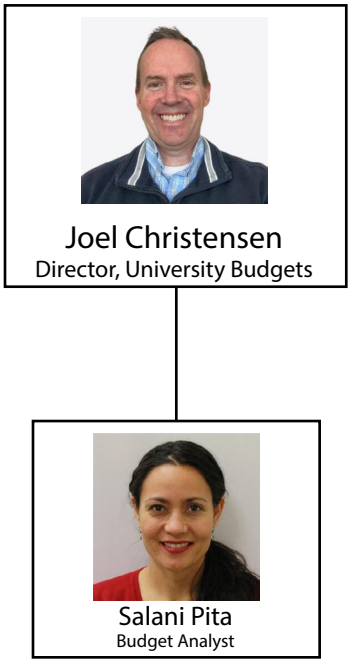
Wireless bluetooth earpiece
Sony earbud headphones
Tecno bluetooth headphones that hang around neck
Wired noise canceling headphones

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



Rebecca Harrison
Director, Regulatory Acctg & Reporting



Kathleen Rugg
Regulatory Acctg Manager



David Morris
Grants & Contracts Acctg Manager



Paul Larsen
University Tax Manager



Kyle Rushton
Regulatory Accountant



Terilee Hutchings
Accounting Specialist



Erik Busath
Asst University Tax Manager



Janelle Wilson Simpson
University Tax Associate



Cherylnn Johnson
Asst Manager, G&C Acctg



Cyndi Sederholm
Post Award Accountant



Danae Hamilton-Whitcomb
General Accounting Specialist



John Clark
Post Award Accountant

Student Financial Services



Brian Blum
Director, Student Financial Services



Glenda Tolman
Collection Manager



Brandon Dailey
Std Financial Systems Analyst



Lori Glenn
Asst Director, Student Finance Svc



Heather Toponce
Collections Specialist



Tiffany Hawkins
Manager, Student Accounts



Kali McCleary
Supvsr, Off-Campus Receivables



Mariah Brustad
Student Account Specialist



Heather Parcell
Student Account Specialist

Treasury Services



David Paul
University Treasurer



Steve Morley
Asst Treasurer - Banking Ops



Dane Larsen
Asst Treasurer - Payment Svs



Connor Brown
Univ eComm & Cash Sys



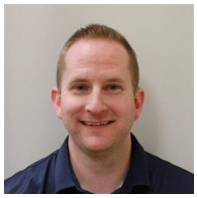
Jon Hardy
Cougar Cash Applications Mgr



Kim Stringham
Merch Svc & Compliance Manager



Brent Shutt
Treasury Services Specialist



Dallin Fredrickson
University Cash Manager



Tammy Miner
University Vault Supervisor

Financial Accounting & Reporting



John Leatherwood
Director, Financial Acctg & Reporting



Amy Foote
ASB/Enrollment Svc Business Partner



Michael Burr
Senior Manager, Fin Acctg



Ryan Wells
University Fin Ops Ctr Manager

General Accounting



Michael Burr
Senior Manager, Financial Acctg



Andrew Neil
University Accountant



Larry McFerson
University Accountant



Marshall Chamberlain
University Accountant

Accounts Payable & Finance Operations Center



Ryan Wells
Univ Fin Ops Ctr Mgr



Nancy Wilson
Assistant Accounts Payable Mgr



Sabrina Warren
Asst Univ Fin Ops Ctr Mgr



Shelby Barney
Accounts Payable Specialist

Payroll



Shannon Kelly
Payroll Manager



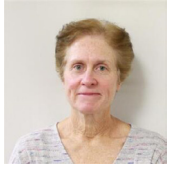
Chris Shawcroft
Assistant Manager



Emily Hardy
Payroll Specialist



Francel Hooke
Payroll Specialist



Pam Wilson
Sr Payroll Specialist

Kennedy Center Finance



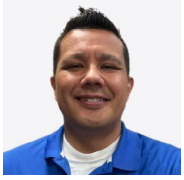
Temo Altamirano
International Finance Business Partner



Carri Ward
ISP Financial Manager



Nellie Ashby
Kennedy Cntr Finance Oper Mng

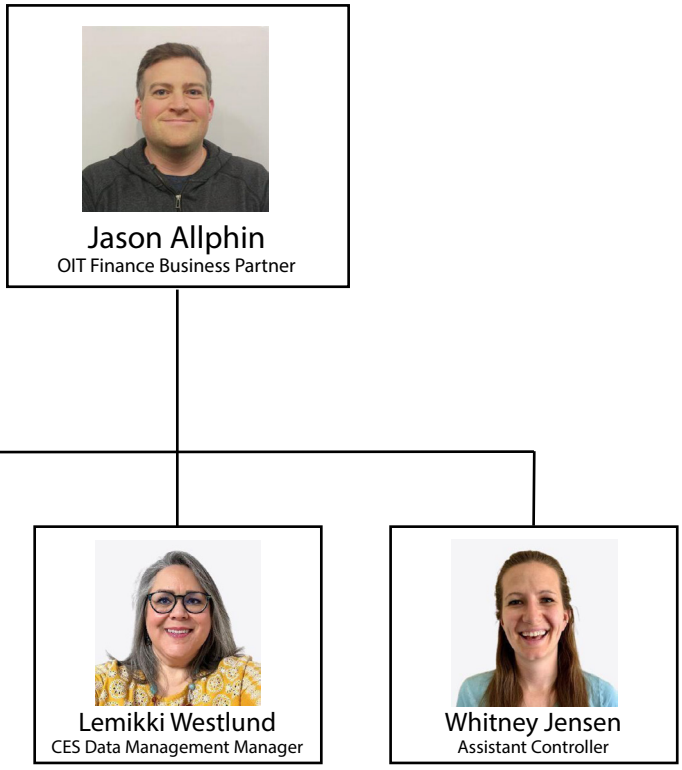


Troy Galbraith
Kennedy Cntr Finance Oper Mng

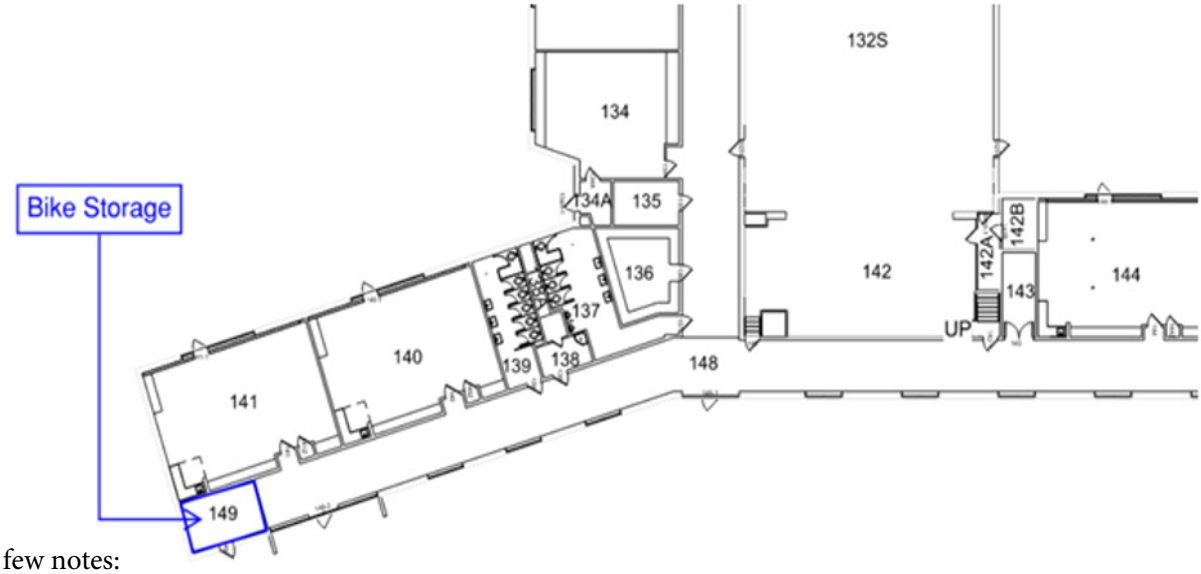


Lydia Moyer
ISP Financial Asst/Supervisor

OIT Finance



Long-term bike storage - ECCB 149



A few notes:

- "Long-term" is intended for all day storage.
- If you only need storage for a few hours, we would expect you to use the other outdoor bike racks.
- Outdoor access only - Card access is required, anyone with card access to the building has access to the bike storage. It is recommended that you lock your bike if using long term or short term bike storage.

Office Locations

AAVP Office
Alan Moose (112 ECCB)
Andy Cluff (107 ECCB)
Lynette Cummings (112 ECCB)

Accounts Payable & Ops Cntr. (140 ECCB)
Nancy Wilson
Ryan Wells
Sabrina Warren
Shelby Barney

Administration VP (ECNB)
Katy Clark
Steve Hafen

Budget (140 ECCB)
Joel Christensen
Salani Pita

Financial Accounting & Reporting
Amy Foote (141 ECCB)
John Leatherwood (141 ECCB)

General Accounting (141 ECCB)
Andrew Neil
Larry McFerson
Marshall Chamberlain
Michael Burr

Grants & Contracts Acctg (108 ECCB)
Cherylnn Johnson
Cyndi Sederholm
David Morris
Danae Hamilton-Whitcomb
John Clark

International Finance
Carri Ward (222 HRCB)
Lydia Moyer (204G HRCB)
Nellie Ashby (214 HRCB)
Temo Altamirano (108A ECCB)
Troy Galbraith (237C HRCB)

OIT Finance
Janice Foutz (3102 ITB)
Jason Allphin (3110 ITB)
Lemikki Westlund (3214 ITB)
Whitney Jensen (3102 ITB)

Payroll (108 ECNB)
Chris Shawcroft
Emily Hardy
Francel Hooke
Pam Wilson
Shannon Kelly

Regulatory Acctg & Reporting (107 ECCB)
Kathleen Rugg
Kyle Rushton
Rebecca Harrison
Terilee Hutchings

Student Financial Services (132 ECCB)
Brandon Dailey
Brian Blum
Glenda Tolman
Heather Parcell
Heather Topance
Kali McCleary
Lori Glenn
Mariah Brustad
Tiffany Hawkins

Tax Office (142 ECCB)
Erik Busath
Janelle Wilson Simpson
Paul Larsen

Treasury Services (132 ECCB)
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 of the lines signed, take your paper to 112 ECCB for a Jamba Juice certificate.

AAVP Office/Alan Moose – 112 ECCB

_____

Accounts Payable & Ops Cntr. – 140 ECCB

_____

Budget – 140 ECCB

_____

General Accounting – 141 ECCB

_____

Grants & Contracts Accounting – 108 ECCB

_____

Kennedy Center Finance – HRCB

_____

OIT Finance – ITB (available on Tuesdays)

_____

Payroll – 108 ECNB

_____

Regulatory Accounting & Reporting – 107 ECCB

_____

Student Financial Services – 132 ECCB

_____

Tax Office – 142 ECCB (stage)

_____

Treasury Services – 132 ECCB

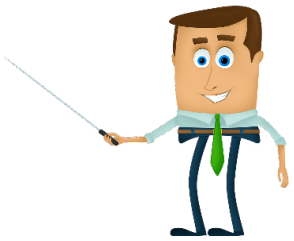
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Professional Development

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 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 talent.byu.edu/hrd-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 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.

Award.co

The Rise & Shout Award recognizes outstanding contributions and extraordinary results based on the demonstration of our BYU mission and values.

You can also give a Shout Out Award to your colleagues at any time to express thanks and appreciation. Log in to byu.awardco.com to recognize others and learn more.

awardco

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 student employee, you can give them a cougar cash coupon. They can be obtained from Lynette or her student employees in 112 ECCB.

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:

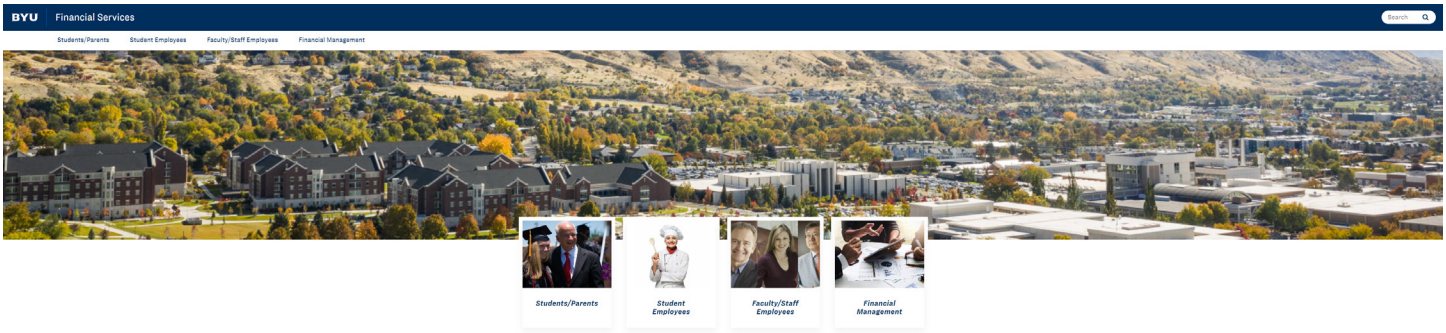
- Promote excellence by providing opportunities for networking, recognition, and exchange of ideas
- To encourage individual and professional growth

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:

- 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:

- Staff Hiring and Employment Policy
- Staff & Student Employee Work Schedule Break & Meal Period
- Staff and Student Employee Overtime Policy
- Staff Employee Leaves Policy
- Staff Employee Discipline Policy
- Staff Employee Grievance Policy
- Advertising, Selling, Soliciting Policy
- Catering and Food Distribution Policy
- Compensation Policy
- Conflict of Interest Policy
- Employee Termination Policy
- Employee Tuition Benefit 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
- Student Hiring and Employment Policy
- Supplemental Compensation for Exempt Staff Policy
- Surplus Property Policy
- Travel Policy
- University Fund Raising 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

Workday intro & job aids can be found at workday.byu.edu/help

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To change how frequently you receive notifications from Workday, click on your photo/my account/change preferences

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Helpful Trainings in Workday Learning:
BYU Workday: Absence
BYU Workday Ready: Staff + Time

Scheduling Rooms

Do the following to schedule rooms for meetings or events



Add the room as an attendee using Scheduling Assistant in Outlook:

- All East Campus conference rooms
- ITB conference rooms
- HRC conference rooms

Call Campus Scheduling at 2-3134 to schedule rooms in the Wilk and other buildings on campus.

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

- East Campus Mini Marts / Kitchen / Kiwanis Park picnic tables
- ITB Breakrooms (Rooms 1012, 2208, 3210, 3032)
- Conference rooms
- There are tables and microwaves available in the Wilkinson Center across from the Cougareat
- There are several other places to eat lunch across campus:
  - Bring your own lunch locations – Snack section in the library, courtyard of the JFSB, outside of the Creamery on 9th, seating areas on the 2nd floor of the Wilk, the small alcove on the west side of the HBLL, and there are picnic tables on the walking trail on the south side of campus
  - Ideas of places to buy lunch on campus – Along with the Cougareat and Cannon Center there are less known locations where you can get lunch. They include the Blue Line Deli in the Tanner Building, the MOA café, Legends Grille, and Harvey's. A full list of BYU Dining locations is at dining.byu.edu. 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, Microwaves, & Fridges

- There are sinks in the Mini Mart and kitchens in both East Campus buildings. Fridges and microwaves are in the kitchens.
- Rooms 1012, 2208, 3210 and 3032 in the ITB have microwaves, sinks, and fridges.
- Room 207 HRCB has a sink, fridge, and microwave and there are vending machines on the first floor of the HRCB.



Ice & Soda Machines

- There is a soda machine and ice machine in the east campus mini marts.
- The ITB has a soda and ice machine in 2025 ITB.

Conference Room Reservations

Conference rooms and mother's rooms can be reserved in two ways:

1. Through Outlook: When scheduling a meeting, select the appropriate room number under the "Location" tab.
2. Via On-Site Schedulers: Each room has a touchscreen scheduler outside the door. You can reserve a room directly from there.

Reservation Guidelines:

- You may book recurring meetings up to six months in advance.
- Please be considerate, as these rooms are shared by many.
- If your plans change, cancel your reservation to free up the room for others.

Conference Room Capacity:

BLDG	ROOM	CAPACITY
ECCB	103	10
ECCB	113	10 TO 18
ECCB	124	20
ECCB	127	8
ECCB	133	12 TO 20
ECCB	135	5
ECCB	144	14 TO 30
ECNB	100C	4
ECNB	100D	4
ECNB	110	10
ECNB	114	14 TO 32
ECNB	115	13 TO 38
ECNB	119	12 TO 24
ECNB	201B	9
ECNB	208A	6
ECNB	208B	5
ECNB	208C	5
ECNB	208D	5
ECNB	213	4
ECNB	216	4
ECNB	219	4

BLDG	ROOM	CAPACITY
ITB	3006	14-28
ITB	3308	14
ITB	3310	14
ITB	1004	10-25
ITB	1006	10-25
ITB	2031	10
ITB	2017	4
HRCB	109	
HRCB	238	
HRCB	257	
HRCB	237B	



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 Act
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

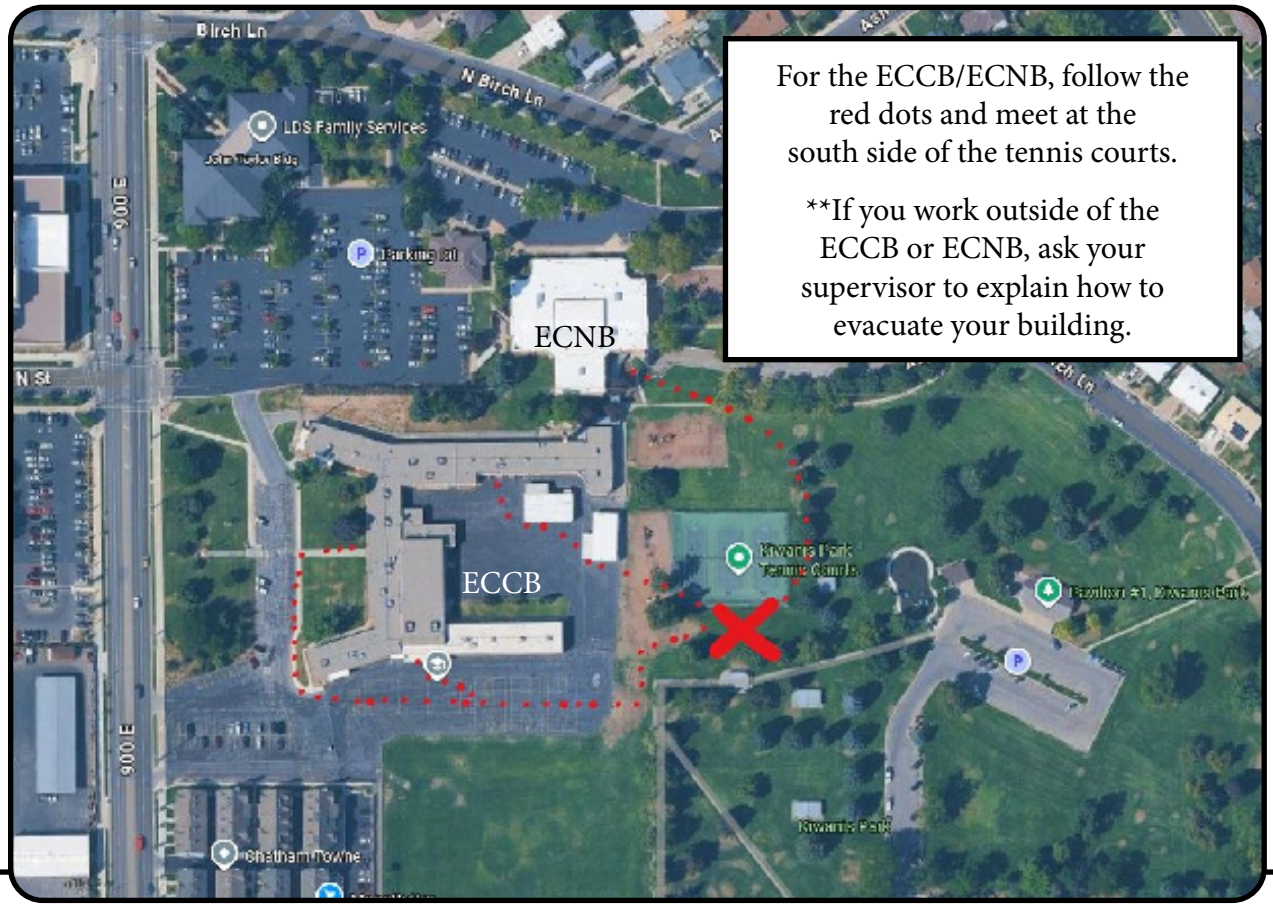
Evacuation Plan

East Campus 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 the Financial Services employees at East Campus 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.
- 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 the 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 roll from the employee list and provide it to the Emergency Supervisor who will be 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.



Notes