

# New Employee Information Book

**BYU** Financial  
Services

**Welcome to  
Brigham Young  
University**

ENTER TO LEARN GO FORTH TO SERVE







# Table of Contents

- 2 - Welcome Page
- 3 - MVV / Mission Statement
- 4 - New Employment Checklist
- 6 - FS Orientation
- 7 - Financial Services Councils
- 8 - Dress Code
- 9 - Employee Benefits & Discounts
- 10 - Phone List
- 11 - RingCentral
- 12 - Org Charts
- 20 - Office Locations & Activity
- 22 - Professional Development
- 23 - Awards & Training
- 24 - FS Website & MyBYU
- 25 - Policies & Workday
- 26 - Scheduling Rooms & Lunch Options
- 28 - Acronyms
- 29 - Evacuation Plan
- 30 - Notes

# Welcome Page

Welcome to BYU Financial Services! This booklet is intended to help you get set up and settled in, and we hope that you will use it as a reference along with the [welcome.byu.edu](http://welcome.byu.edu) website. An online version can be found at [finserve.byu.edu/Financial Management/CFO & Controllershship/New Staff Employee](http://finserve.byu.edu/Financial%20Management/CFO%20&%20Controllershship/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](mailto:lynette_cummings@byu.edu)  
Office: 112 ECCB  
Phone #: 2-3662

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

## Financial Services

### Mission

**Help students thrive by fostering a productive, safe, and inspiring Christ-centered campus community.**

### Vision

**To be trusted partners who empower wise financial decisions and stewardship of sacred resources to strengthen BYU's mission as the Christ-centered, prophetically directed university of prophecy.**

### Values

Faith in Christ  
Integrity in Action  
Excellence and Accountability in Execution  
Respect and Love for All  
Covenant Belonging  
Efficient Use of Sacred Resources

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

# New Employee Checklist

## Welcome Page

Go to [welcome.byu.edu](https://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 to Y-Alert (<https://emergencymanagement.byu.edu/>)

2

## HR Website

Go to [hrs.byu.edu](https://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](https://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](https://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](https://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](https://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](http://alias.byu.edu)
- Get access to printers
- Go to [software.byu.edu](http://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](http://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](mailto: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](http://enrollment.byu.edu/registrar/aim-access)
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

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



### Building Access

Email [katy\\_clark@byu.edu](mailto:katy_clark@byu.edu) with your netID to request ECCB/ECNB building access (request after hours door 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 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.



### Stationery

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

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

## 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.

## 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

# Financial Services Councils

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

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

*Professional  
Development  
Council*

*Annual  
Activities  
Council*

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

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

*Employee  
Engagement  
Council*

*Newsletter  
Council*

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

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

*Division  
Meetings  
Council*

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

*Also...*

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

# Dress Code

## Business Casual Attire

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

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

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

EMPLOYEE  
BENEFITS



## Other opportunities...

### Cell Phone Plan

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

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

### Education Week

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

[educationweek.byu.edu](http://educationweek.byu.edu)

### Wellness

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

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

# Phone List

## Financial Services

4057 Alan Moose  
 7061 Amy Foote  
 9766 Andrew Neil  
 6218 Andy Cluff  
 4259 Brandon Dailey  
 4878 Brent Shutt  
 4023 Brian Blum  
 0462 Carri Ward  
 2929 Cheryl 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  
 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  
 2080 Larry McFerson  
 0046 Lemikki Westlund  
 1625 Lori Glenn  
 0421 Lydia Moyer  
 3662 Lynette Cummings  
 7035 Mariah Brustad  
 4436 Marshall Chamberlain  
 6641 Marva Yapias  
 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 Lindsay 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](http://www.ringcentral.com/download)
- Be sure to log on with ‘Single Sign On’ using your netID@byu.edu

Click [here](#) for RingCentral training

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

Click [here](#) to do the following or contact [financialservices@byu.edu](mailto:financialservices@byu.edu).

- Change name display on a physical RingCentral phone
- Cancel a RingCentral desk phone
- Make changes to your RingCentral desk phone

Click [here](#) to set up / make changes to voicemail

- Connect voicemail to email
- Link the voicemail to a different email account

## Answering Devices

Some employees use their cell phone to answer their RingCentral calls and others prefer to use a device. You can let Lynette know if you would like a device when you meet with her for the FS Orientation Meeting or you can email [financialservices@byu.edu](mailto:financialservices@byu.edu). The devices we have been ordering for employees are listed below. You can also purchase your own device and be reimbursed up to \$60.

[Wireless bluetooth earpiece](#)

[Sony earbud headphones](#)

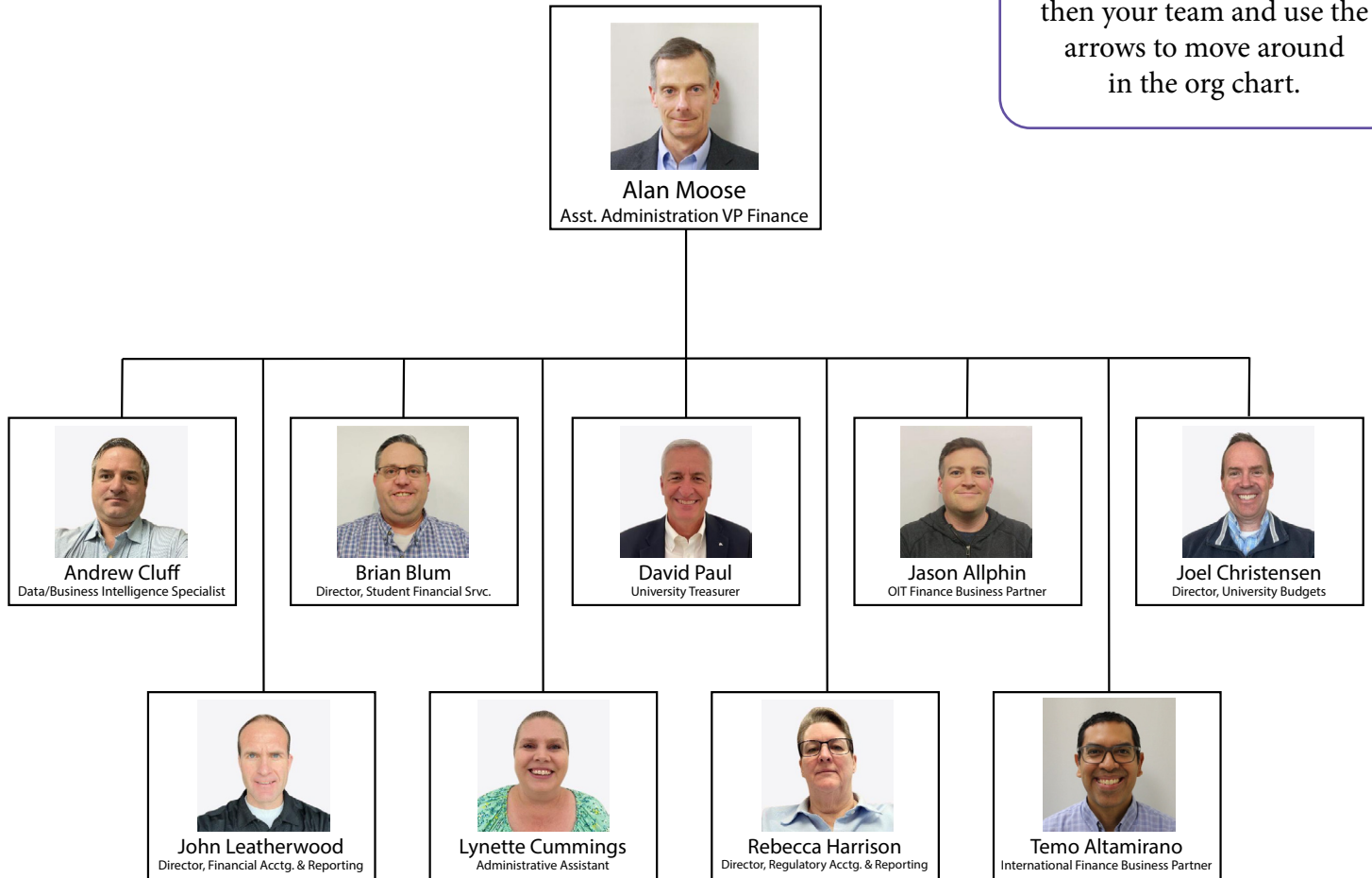
[Tecno bluetooth headphones that hang around neck](#)

[Wired noise canceling headphones](#)

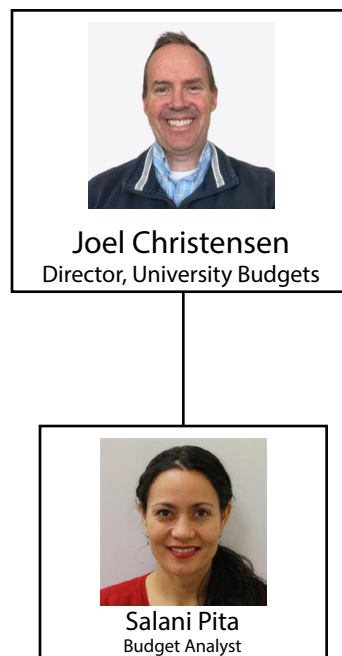


# Org Charts

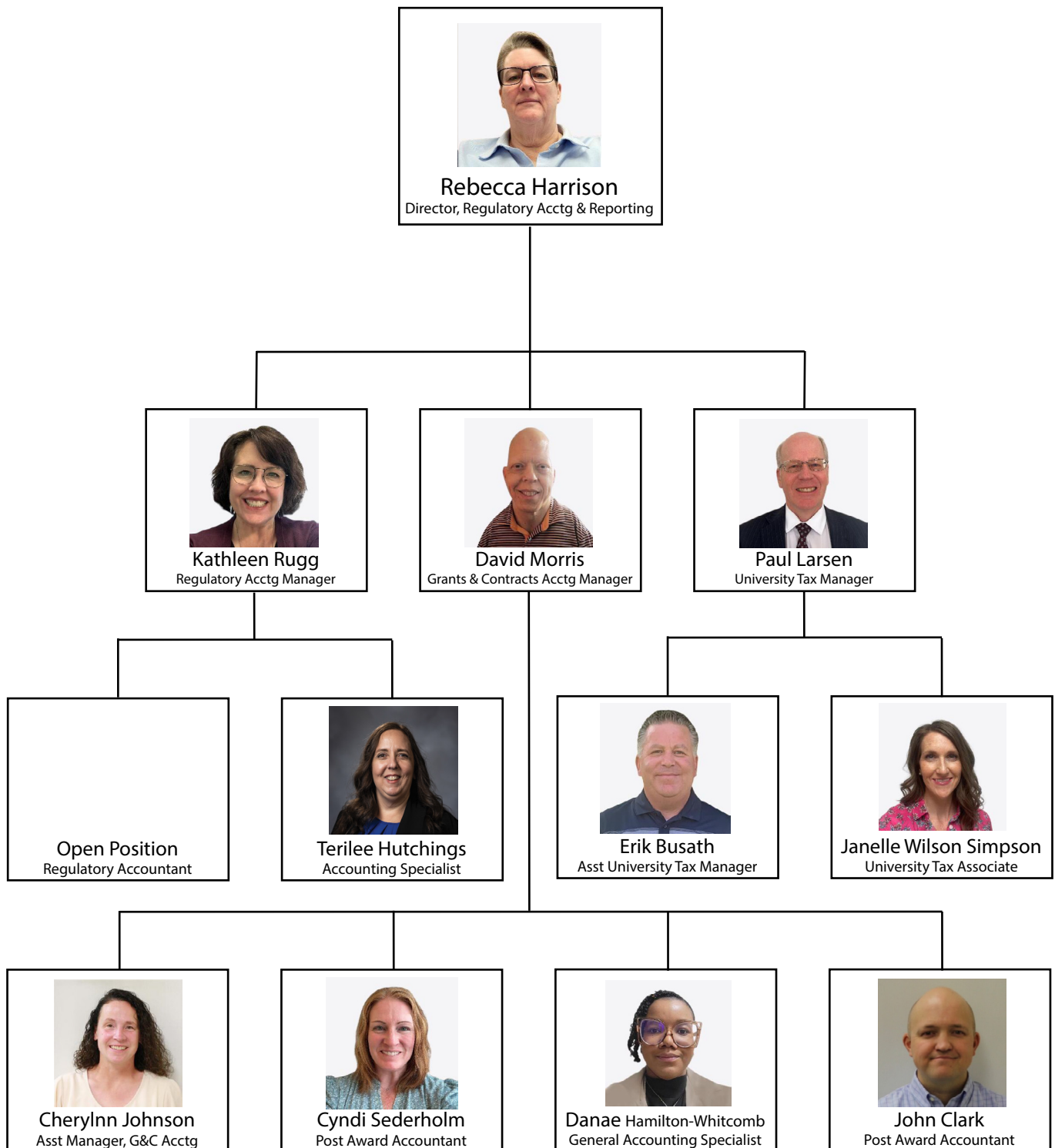
To see the full University Org Chart (with student employees), go to Workday, click on your profile and then your team and use the arrows to move around in the org chart.



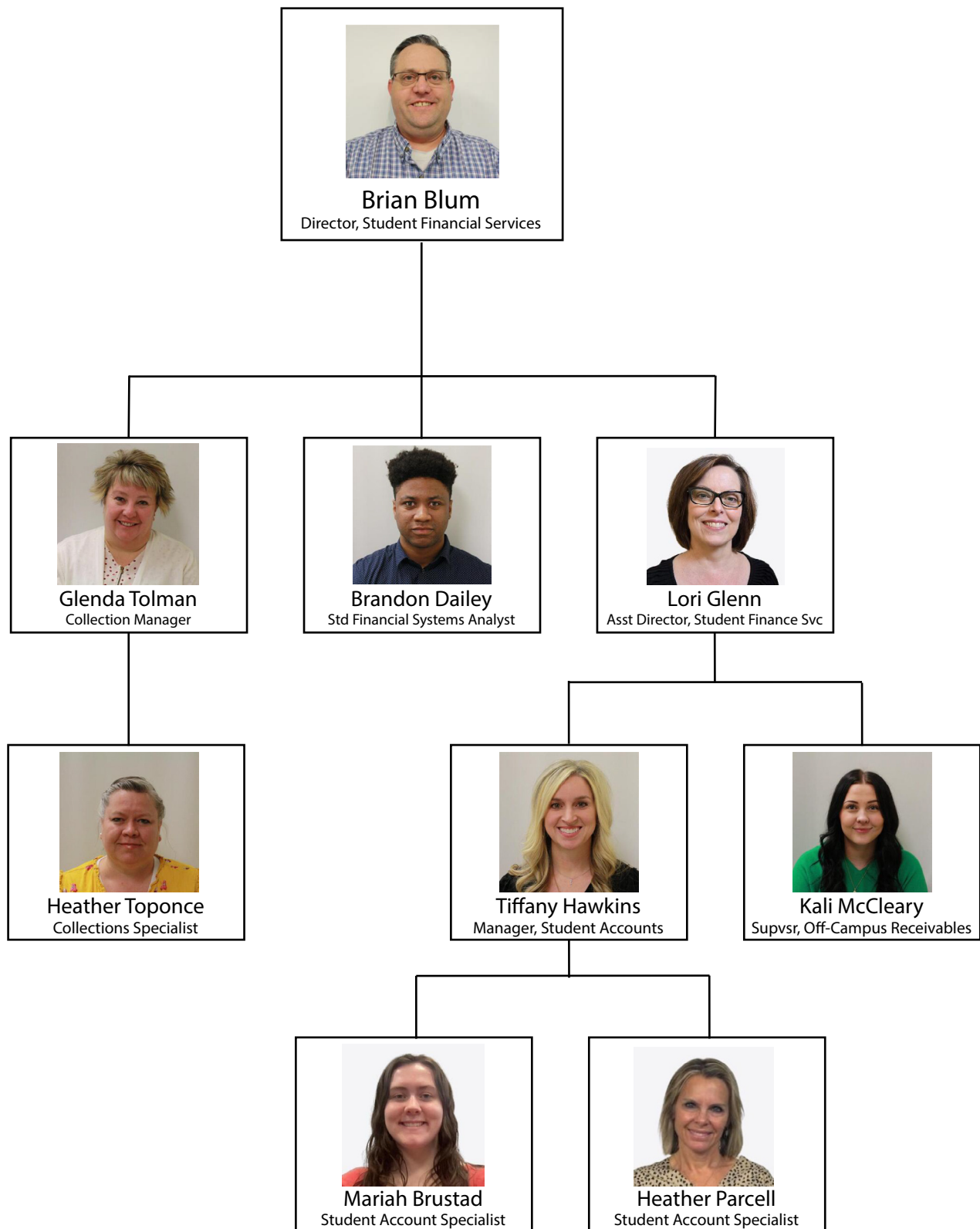
## Budget



# Regulatory Accounting




# Student Financial Services




# Treasury Services




**David Paul**  
University Treasurer




**Steve Morley**  
Asst Treasurer - Banking Ops



**Dane Larsen**  
Asst Treasurer - Payment Svcs



**Connor Brown**  
Univ eComm & Cash Sys



**Jon Hardy**  
Cougar Cash Applications Mgr



**Kim Stringham**  
Merch Svc & Compliance Manager



**Brent Shutt**  
Treasury Services Specialist

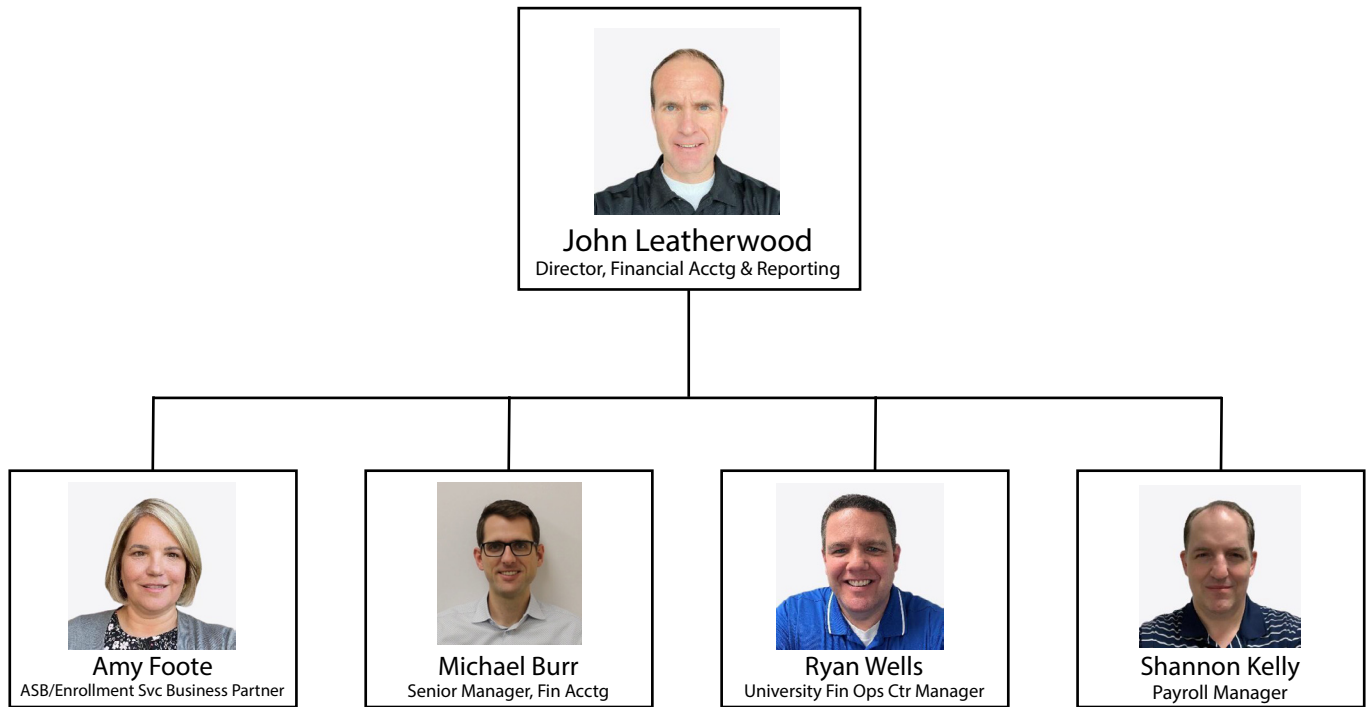


**Dallin Fredrickson**  
University Cash Manager

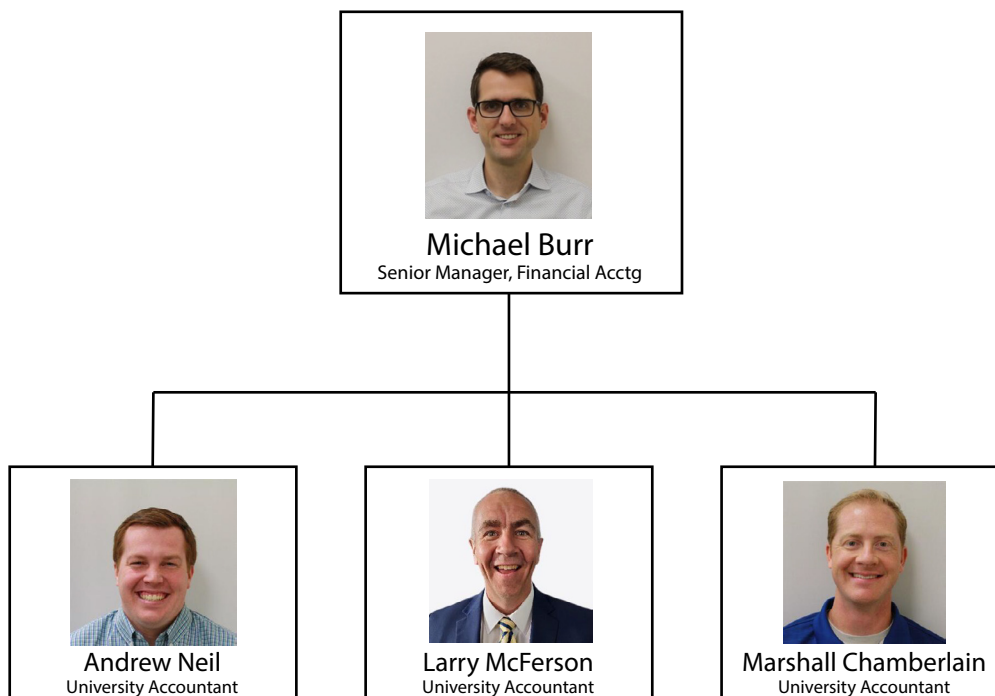


**Tammy Miner**  
University Vault Supervisor

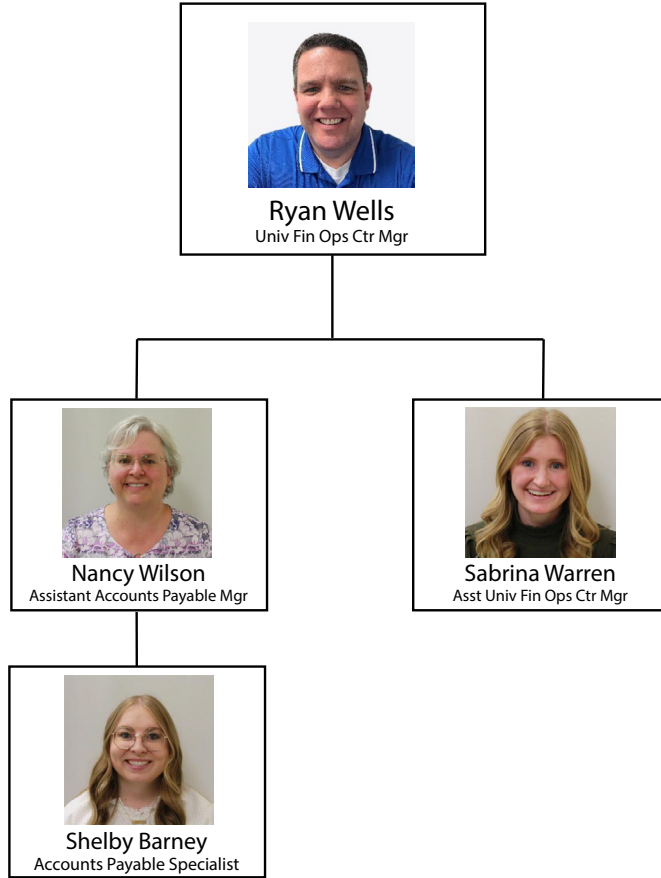
## Financial Accounting & Reporting



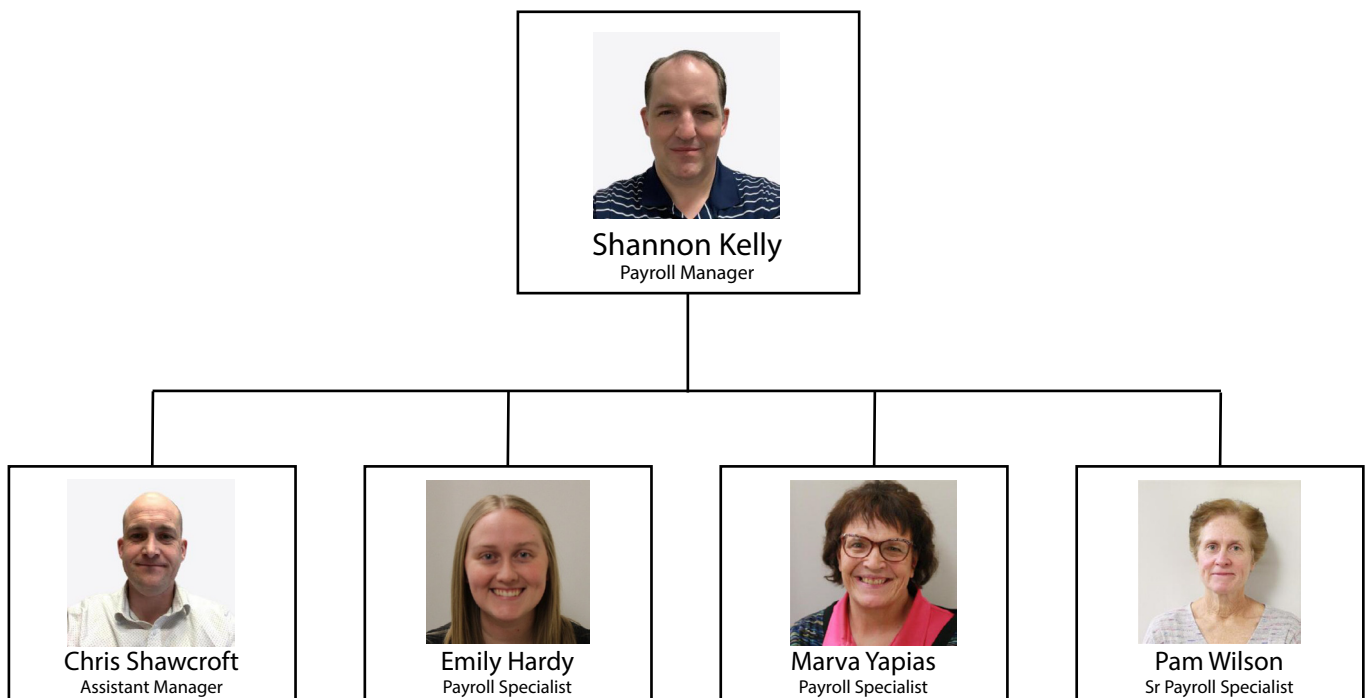
## General Accounting



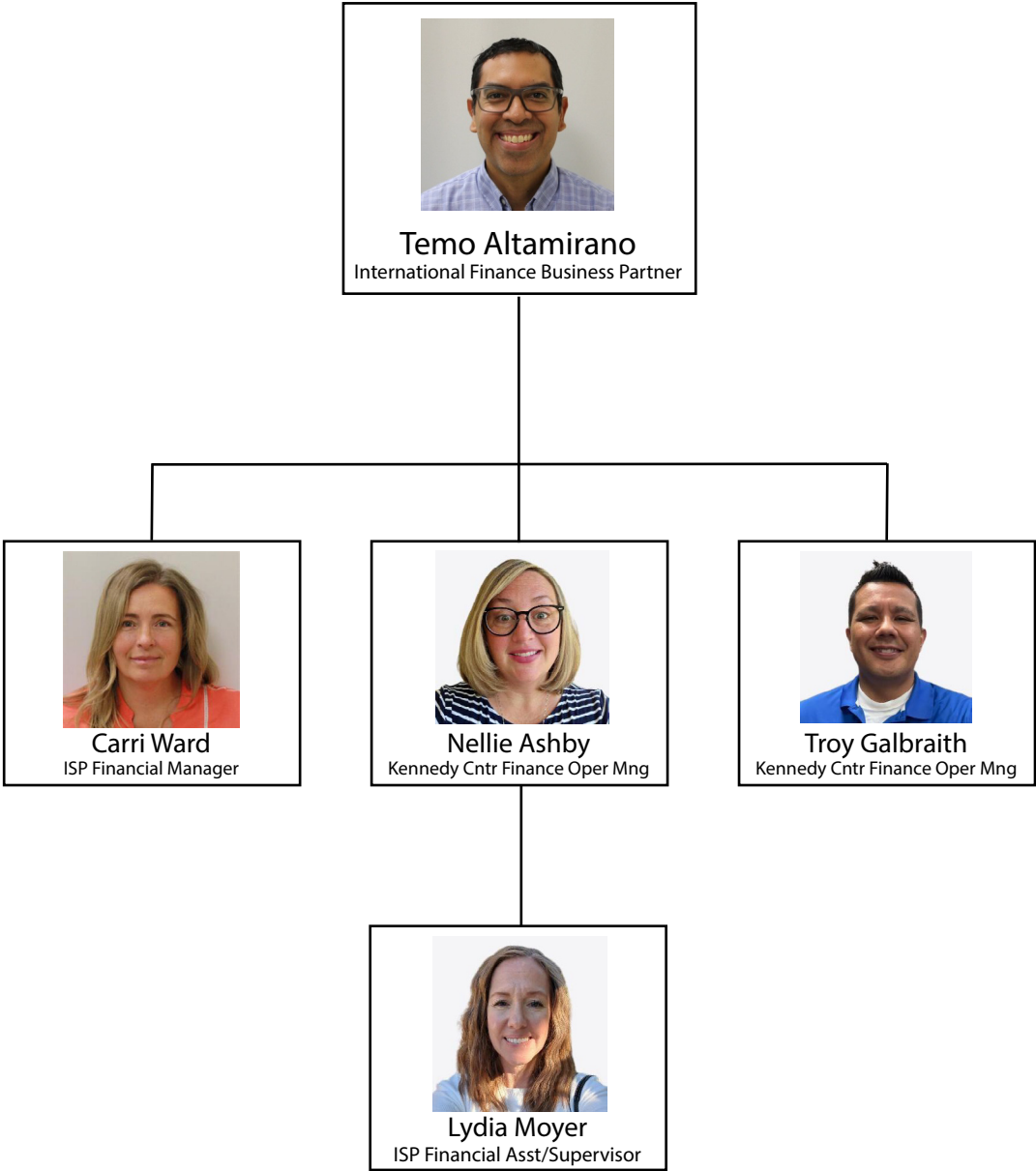
## Accounts Payable & Finance Operations Center



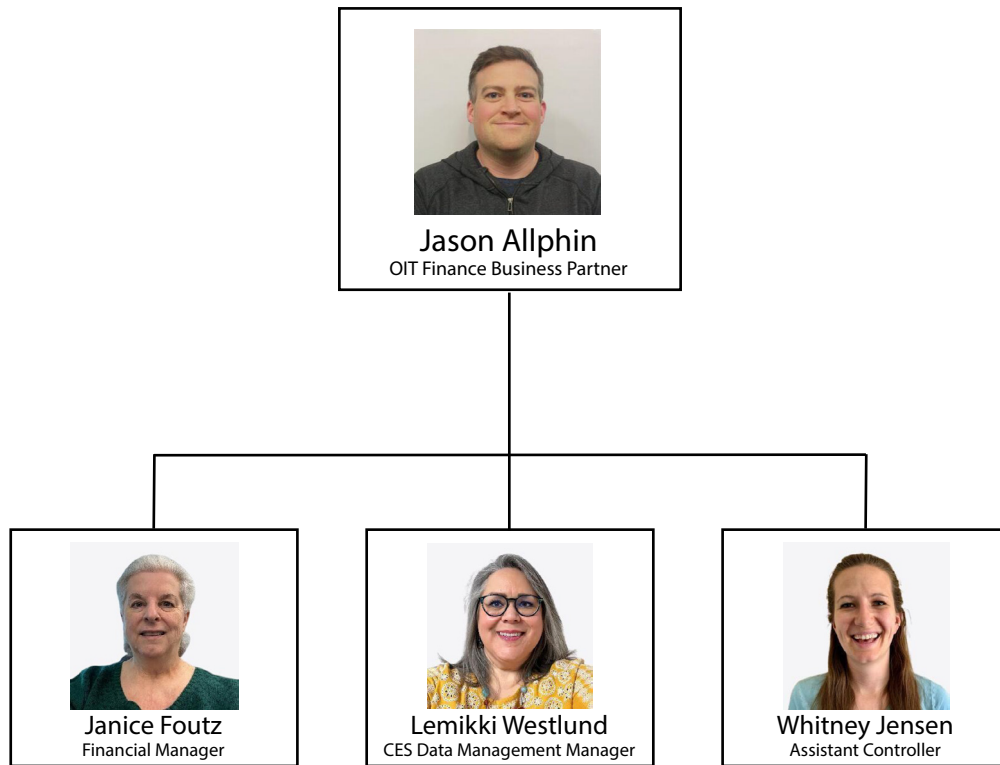
## Payroll



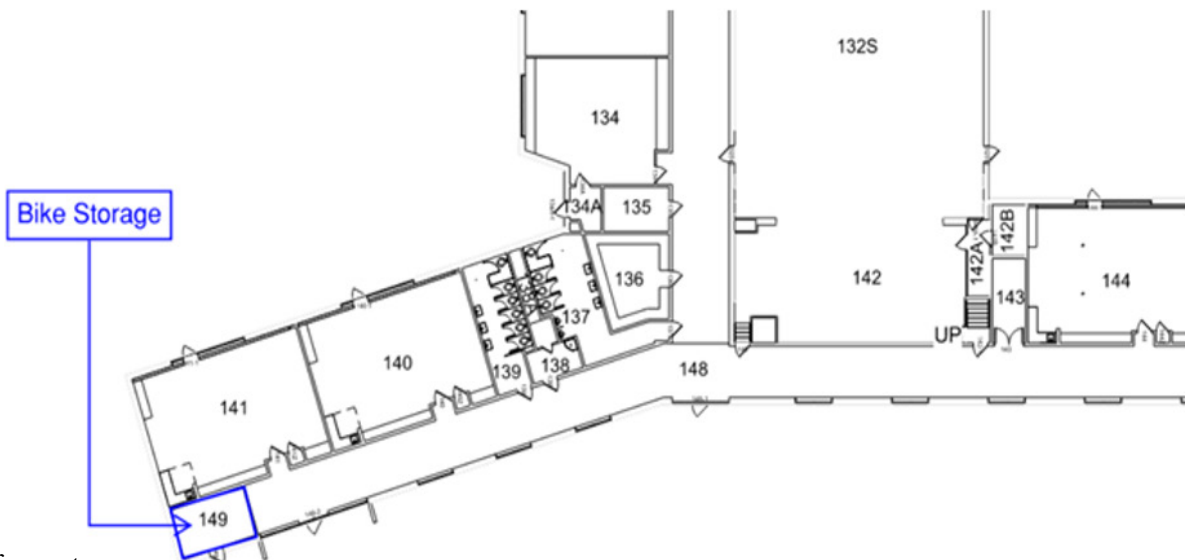
*Kennedy Center Finance*



# 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)

CherylInn 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  
Pam Wilson  
Marva Yapias  
Shannon Kelly

## Regulatory Acctg & Reporting (107 ECCB)

Kathleen Rugg  
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

---

Payroll – 108 ECNB

---

Accounts Payable & Ops Cntr. – 140 ECCB

---

Regulatory Accounting & Reporting – 107 ECCB

---

Budget – 140 ECCB

---

Student Financial Services – 132 ECCB

---

General Accounting – 141 ECCB

---

Tax Office – 142 ECCB (stage)

---

Grants & Contracts Accounting – 108 ECCB

---

Treasury Services – 132 ECCB

---

Kennedy Center Finance – HRCB

---

OIT Finance – ITB (available on Tuesdays)

---

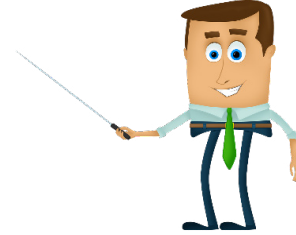


# Professional Development

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

## **Tuition Benefit**

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



## **BYU Training LMS**

Access online employment training developed for BYU students, faculty, and staff. There are a variety of courses you can take. To participate just log into [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](https://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](https://lib.byu.edu/services/software-training).

## **Workshop Training**

Human Resource Development offers workshops to non-student employees. These workshops include Crucial Conversations, Influencer, Multipliers, The 5 Choices, The 7 Habits of Highly Effective People and more. To find out more go to [talent.byu.edu/hrd-workshops](https://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](https://calendar.byu.edu/devotionals-forums) for a list of speakers.

## **Financial Management Forum**

The main purposes of the BYU FMF are to (1) promote and increase financial literacy at BYU, (2) provide opportunities for professional development, and (3) help colleagues in finance-related roles become acquainted, network, and share best practices. 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](http://byu.awardco.com) to recognize others and learn more.



## 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](http://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:

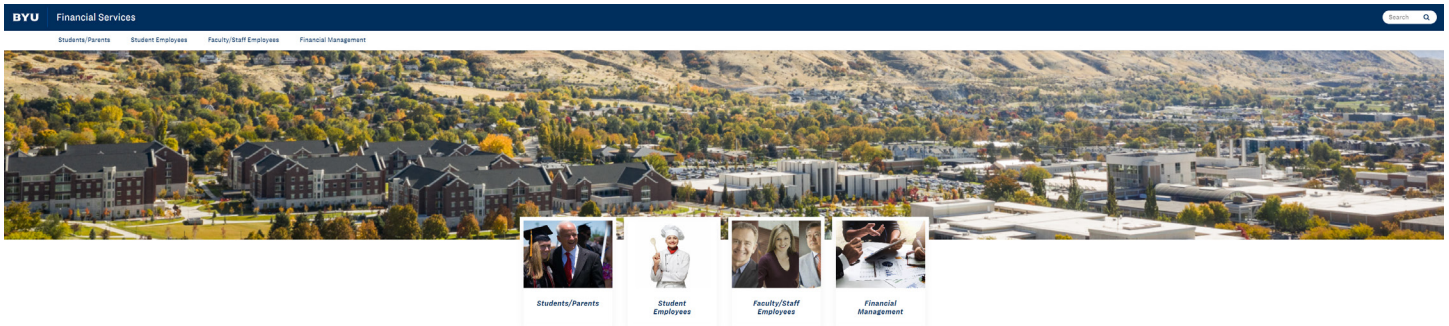
- Promote excellence by providing opportunities for networking, recognition, and exchange of ideas
- To encourage individual and professional growth

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



# FS Webpage



## Financial Services Web Page

The Financial Services webpage can be found at [finserve.byu.edu](https://finserve.byu.edu). A lot of helpful information can be found here including the following:

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

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

- Accounting
- Budget
- CFO & 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](https://my.byu.edu) by clicking on the "Add Links" button at the bottom of the page. Some items to add are listed below, but there are many others available. Take a minute and look through them.

- Cell Phone Services
- 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](https://finserve.byu.edu/contact)

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

# Policies

This is a list of policies used by Financial Services, and it is recommended that you review them. These and all university policies are found at [policy.byu.edu](https://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 Hiring and Employment Policy](#)
- o [Staff & Student Employee Work Schedule Break & Meal Period](#)
- o [Staff and Student Employee Overtime 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 Tuition Benefit 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 [Student Hiring and Employment Policy](#)
- o [Supplemental Compensation for Exempt Staff Policy](#)
- o [Surplus Property Policy](#)
- o [Travel Policy](#)
- o [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](https://workday.byu.edu/help)

---

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

---

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

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



# Lunch Options

## Spaces available to eat lunch

- 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 Cougarreat
- 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 HBLI, 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 Cougarreat and Cannon Center there are less known locations where you can get lunch. They include the Blue Line Deli in the Tanner Building, the MOA café, Legends Grille, and Harvey's. A full list of BYU Dining locations is at [dining.byu.edu](http://dining.byu.edu). 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](http://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	BLDG	ROOM	CAPACITY
ECCB	103	10	ITB	3006	14-28
ECCB	113	10 TO 18	ITB	3308	14
ECCB	124	20	ITB	3310	14
ECCB	127	8	ITB	1004	10-25
ECCB	133	12 TO 20	ITB	1006	10-25
ECCB	135	5	ITB	2031	10
ECCB	144	14 TO 30	ITB	2017	4
ECNB	100C	4	HRCB	109	
ECNB	100D	4	HRCB	238	
ECNB	110	10	HRCB	257	
ECNB	114	14 TO 32	HRCB	237B	
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			



# 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.

