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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/new_full-time_employee and you can use the links in that version. (Hold down Cntrl while you click the link to open in a new tab.) Please work with your peer mentor and supervisor as you complete the new employee checklist. They can also explain other items in the booklet. You are welcome to contact Lynette Cummings and her student employees with questions too.

**Contact Info:**
Lynette Cummings  
Administrative Assistant, Financial Services  
Email: lynette_cummings@byu.edu  
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:**

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**MISSION:**  
We promote and protect the economic interests of all BYU stakeholders.

**VISION:**  
To be trusted partners who empower wise financial decisions and stewardship of sacred resources.

**VALUES CRITERIA:**  
Competency
Respect and Belonging for All Individuals
Integrity
Teamwork
Exceeding Customer Expectations
Responsible Use of Sacred Resources
Innovation
Accountability and Results
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.

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

Contact Info
Update your contact information on My BYU.
- Update work and personal information by going to Campus Links/Communication/Personal Information/Contact Info
- In order for your work address and phone number to be listed in the campus directory they need to be entered on your contact info on My BYU

HR Website
Go to hrs.byu.edu for information about DMBA, financial planning, university wellness activities and much more.

Then click on “Current Employee” to find a lot more useful information about training & development, paid holidays, employment verification, maternity & paternity leave, etc.

ID Card Tips
- New employees will be able to get an ID card one day after all hiring processes are completed by the employment and compensation offices. (HR often has new employees come to get an ID card right after submitting the I-9 or other paperwork and they are not able to make them an ID card. It takes an overnight update after all hiring processes are completed for the person to be an “employee” in our system.)
- The HR Office prefers that new employees submit their ID card photo online at idcenter.byu.edu/photo.
- 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.

Direct Deposit and Form W-4
All employees are required to set up direct deposit for their paychecks. Please click here to do that. Click here to adjust your W4 information.

Additional information about payroll can be found at https://finserve.byu.edu/payroll.

Tech Items
Go to oit.byu.edu/employees for information on the following:
- Setting up Duo
- Connecting to WiFi
- Security software
- Available computer software
- Email filter
- Password resets
- And much, much more...
**Computer Set Up**
- Click [here](mailto:https://example.com) to order email
- Manage email alias at [alias.byu.edu](http://www.alias.byu.edu)
- Have Crash Plan set up on your computer to back it up
- Get access to printers

**Computer Access**
(You may not need access to all of these systems, and you may need access specific to your area that is not listed on the general list below. Discuss this with your supervisor and use the lines below to add additional access you will need.)

- Box – Contact the director over your area for access
- Peoplesoft Financials (read only) – Email lynette_cummings@byu.edu
- Update the manager/contact information for Peoplesoft operating units & depts if applicable
- Student Financials – Email lynette_cummings@byu.edu (name, dept., net ID, access needed)
- HR Peoplesoft – Email lynette_cummings@byu.edu (name, dept., net ID, access needed)
- Business Objects – email rebecca_harrison@byu.edu with new employee's name, net ID, department, and the name of the person they are replacing along with their net ID
- Chrome River, Fast Track, Y-Marketplace – Training is located [here](https://example.com)
- Transact – click [here](https://example.com) for the application
- AIM (Registrar’s Office) – [enrollment.byu.edu/registrar/aim-access](http://www.enrollment.byu.edu/registrar/aim-access)
- _________________________________________________________________________
- _________________________________________________________________________
- _______________________________________
- _______________________________________

**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. 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](https://example.com) 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://www.brand.byu.edu) for information on the BYU brand and logos.
Financial Services Orientation

Lynette Cummings will contact you to schedule a Financial Services orientation where you will go over the following items. Feel free to bring any questions you may have to this meeting.

1. Review new employee handbook
2. Schedule a one-on-one meeting with Alan Moose & director
3. Join a Financial Services council
4. Verify building access and office keys
5. Introduction to Ring Central / order phone device if needed
6. How to schedule rooms
7. Outlook training (if needed)
8. Division & controller group meetings
9. Order a division shirt
10. Lunch room options
11. Q&A

Lynette and her student employees will do the following:
- Order a nameplate
- Add you to the FS division email list
- Add your name and office to the mail delivery information
- Add you to the division phone list and birthday list
- Add you to the division newsletter distribution list
- Update the FS website if necessary
- Add you to the OPAC email list
- Add you to the controller group email list (and council email list if appropriate)
- Update liaisons/university accountants contact lists if needed
- Update liaisons on the compliance report if needed

Division Shirt

Look at the links below and choose a division shirt before the FS Orientation Meeting.

Women's Shirts:
- Style A
- Style B
- Style C

Men's Shirts:
- Style A
- Style B
- Style C
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.

<table>
<thead>
<tr>
<th>Council</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Development Council</td>
<td>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.</td>
</tr>
<tr>
<td>Annual Activities Council</td>
<td>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.</td>
</tr>
<tr>
<td>Employee Engagement Council</td>
<td>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.</td>
</tr>
<tr>
<td>Communication Council (Newsletter)</td>
<td>Plans and prepares the publication of the periodic FS newsletter – The Ledger. Members plan editions, prepare content and encourage others to contribute.</td>
</tr>
<tr>
<td>Communication Council (Division Meetings)</td>
<td>Plans the timing and content of periodic department meetings. Identifies topics and presenters, plans refreshments and encourages attendance.</td>
</tr>
</tbody>
</table>

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

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.

<table>
<thead>
<tr>
<th><strong>Men</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shirts:</strong> clean, neatly-pressed collared shirts; golf shirts</td>
<td></td>
</tr>
<tr>
<td><strong>Inappropriate shirts:</strong> no-collared shirts, sweatshirts, T-shirts</td>
<td></td>
</tr>
<tr>
<td><strong>Slacks:</strong> clean, neatly-pressed khakis, dress pants or slacks</td>
<td></td>
</tr>
<tr>
<td><strong>Inappropriate slacks:</strong> wrinkly, worn or tattered pants; blue jeans</td>
<td></td>
</tr>
<tr>
<td><strong>Shoes:</strong> loafers or dress shoes</td>
<td></td>
</tr>
<tr>
<td><strong>Inappropriate shoes:</strong> flip-flops, athletic shoes, sandals</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Women</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shirts:</strong> clean, neatly-pressed shirts, blouses or sweaters</td>
<td></td>
</tr>
<tr>
<td><strong>Inappropriate Shirts:</strong> sweatshirts, T-shirts, tight or revealing shirts or shirts with holes</td>
<td></td>
</tr>
<tr>
<td><strong>Slacks:</strong> clean, neatly-pressed dress pants or slacks</td>
<td></td>
</tr>
<tr>
<td><strong>Inappropriate Slacks:</strong> wrinkly, worn or tattered pants; blue jeans</td>
<td></td>
</tr>
<tr>
<td><strong>Dresses and Skirts:</strong> clean, neatly-pressed casual dresses and skirts</td>
<td></td>
</tr>
<tr>
<td><strong>Inappropriate Dresses and Skirts:</strong> Anything above the knee</td>
<td></td>
</tr>
<tr>
<td><strong>Shoes:</strong> dressy sandals or dress shoes</td>
<td></td>
</tr>
<tr>
<td><strong>Inappropriate Shoes:</strong> flip-flops, athletic shoes</td>
<td></td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Financial Services</th>
<th>Purchasing &amp; Travel</th>
<th>Departments</th>
</tr>
</thead>
<tbody>
<tr>
<td>4057    Alan Moose</td>
<td>5125  Annette Landon</td>
<td>ASB Numbers</td>
</tr>
<tr>
<td>7125    Andrew Neil</td>
<td>7014  Brian Ewell</td>
<td>4840  ASB Custodian</td>
</tr>
<tr>
<td>6218    Andy Cluff</td>
<td>2906  Brian Marks</td>
<td>4833  ASB Custodian</td>
</tr>
<tr>
<td>9766    Ben Wake</td>
<td>7003  Bruce Roden</td>
<td>3738  ASB Mail Room</td>
</tr>
<tr>
<td>1292    Braden Stohlton</td>
<td>2925  Eric D. Smith</td>
<td>4418  Lobby Receptionist</td>
</tr>
<tr>
<td>4259    Brandon Dailey</td>
<td>4702  Garlan McCoy</td>
<td>Accounts Payable</td>
</tr>
<tr>
<td>4878    Brent Shutt</td>
<td>3727  Ginger Miller</td>
<td>3845  Accounts Payable</td>
</tr>
<tr>
<td>4023    Brian Blum</td>
<td>0887  Heather Hughes</td>
<td>3847  Check Processing</td>
</tr>
<tr>
<td>2929    Cheryl Lynn Aamodt</td>
<td>5290  Jake Packer</td>
<td>0243  Fax/Accts Payable</td>
</tr>
<tr>
<td>1538    Chris Shawcroft</td>
<td>0775  Janna Gordon</td>
<td>Administrative Solutions</td>
</tr>
<tr>
<td>2734    Corbin Emerick</td>
<td>7009  Jeff Moss</td>
<td>1861  Adm. Sol. Students</td>
</tr>
<tr>
<td>8062    Craig Larson</td>
<td>3998  Julie Ann Zarbock</td>
<td>Asset Management</td>
</tr>
<tr>
<td>2009    Crystal Frazier</td>
<td>7160  Karen Breerton</td>
<td>3418  Asset Mgt Student</td>
</tr>
<tr>
<td>8309    Cyndi Sederholm</td>
<td>7015  Kelly Taylor</td>
<td>Budget Office</td>
</tr>
<tr>
<td>5716    Dane Larsen</td>
<td>9369  Kett Berry</td>
<td>6633  Budget</td>
</tr>
<tr>
<td>7548    David Morris</td>
<td>8009  Kirstin Abbott</td>
<td>Financial Services</td>
</tr>
<tr>
<td>8123    David Nichols</td>
<td>7129  Kristina Baardson</td>
<td>4701  A-153 Front Desk</td>
</tr>
<tr>
<td>4887    David Paul</td>
<td>8026  Lori Sowards</td>
<td>0241  Fax/A-153 ASB</td>
</tr>
<tr>
<td>3403    Gene McMurtrey</td>
<td>3846  Lorie Andersen</td>
<td>General Accounting</td>
</tr>
<tr>
<td>6634    Glenda Tolman</td>
<td>7036  Lynette McCoy</td>
<td>6106  Gen Acctg Student</td>
</tr>
<tr>
<td>6762    Heather Toponce</td>
<td>3895  Marci McIntosh</td>
<td>Off Campus Receivables</td>
</tr>
<tr>
<td>2623    Jennifer Lund</td>
<td>7011  Megan Goodman</td>
<td>7549  Students</td>
</tr>
<tr>
<td>3693    Joel Christensen</td>
<td>2909  Melissa Messery</td>
<td>Payroll</td>
</tr>
<tr>
<td>7785    John Leatherwood</td>
<td>0040  Morgan Johnson</td>
<td>8186  Payroll students</td>
</tr>
<tr>
<td>6943    Jon Hardy</td>
<td>7010  Paul Romney</td>
<td>Purchasing &amp; Travel</td>
</tr>
<tr>
<td>2694    Kali McCleary</td>
<td>5060  Paul Anderson</td>
<td>3872  Purchasing</td>
</tr>
<tr>
<td>6590    Karen Whipple</td>
<td>7313  Paul Buckner</td>
<td>3872  Travel</td>
</tr>
<tr>
<td>8025    Kathleen Rugg</td>
<td>7290  Peter Esera</td>
<td>7311  Cell Phone Office</td>
</tr>
<tr>
<td>6639    Kevin Walker</td>
<td>7006  Roland Nelson</td>
<td>5645  Help Desk</td>
</tr>
<tr>
<td>801-404-1234 (Cell)</td>
<td>5645  Shannnon Tuckett</td>
<td>0608  Fax</td>
</tr>
<tr>
<td>2080    Larry McFerson</td>
<td>8027  Susan Walters</td>
<td>0608  Fax/Travel</td>
</tr>
<tr>
<td>1625    Lori Glenn</td>
<td>9370  Tammy Merril</td>
<td>Regulatory Accounting</td>
</tr>
<tr>
<td>3662    Lynette Cummings</td>
<td>7001  Terry Hatch</td>
<td>5990  Research Students</td>
</tr>
<tr>
<td>4831    Maria Bateman</td>
<td>9370  Todd Bird</td>
<td>6632  Regulatory Student</td>
</tr>
<tr>
<td>4436    Marshall Chamberlain</td>
<td>7004  Todd Mortensen</td>
<td>7202  Unclaimed Property</td>
</tr>
<tr>
<td>6641    Marva Yapias</td>
<td>6152  Trevor Boultar</td>
<td>7100  Tax Students</td>
</tr>
<tr>
<td>1292    Michael Blackhurst</td>
<td>3472  Tyler Hansen</td>
<td>Student Services</td>
</tr>
<tr>
<td>6220    Nancy Wilson</td>
<td>9371  Wendy Baumgarten</td>
<td>4104  Admissions</td>
</tr>
<tr>
<td>8962    Nathan Dunnigan</td>
<td>3872  Steven Morley</td>
<td>4104  Discontinuance</td>
</tr>
<tr>
<td>6591    Pamela Wilson</td>
<td>7648  Sheri Sechler</td>
<td>4104  Financial Aid</td>
</tr>
<tr>
<td>6630    Paul Larsen</td>
<td>6221  Shelly Barney</td>
<td>0235  Fax/Financial Aid</td>
</tr>
<tr>
<td>8098    Preston Back</td>
<td>2004  Sheri Sechler</td>
<td>2611  Housing (campus)</td>
</tr>
<tr>
<td>4703    Rebecca Harrison</td>
<td>7648  Steven Morley</td>
<td>4701  Petitions (Tuition)</td>
</tr>
<tr>
<td>6721    Ryan Wells</td>
<td>2914  Tammy Miner</td>
<td>2631  Registration</td>
</tr>
<tr>
<td>4759    Sabrina Warren</td>
<td>5996  Terilee Hutchings</td>
<td>4104  Scholarship Office</td>
</tr>
<tr>
<td>3784    Salani Pita</td>
<td>7694  Tiffany Hawkins</td>
<td>2650  -Dept &amp; Univ</td>
</tr>
<tr>
<td>9030    Scott Campbell</td>
<td>7694  Tiffany Hawkins</td>
<td>6434  -Off Campus</td>
</tr>
<tr>
<td>7567    Shannon Kelly</td>
<td>7694  Tiffany Hawkins</td>
<td>6433  -Voc Rehab</td>
</tr>
</tbody>
</table>

### Student Financial Services
- 4580  1098T Questions
- 7549  Off Campus Receiv
- 3874  Stud Fin Students
- 3874  SFS Uploads

### Treasury Services
- 4759  Agency Accounts
- 7806  Deposit Window
- 7767  Deposits
- 8309  Wire Transfers

### Conference Rooms
- 4826  Conference Room (C-233A)

### IT Services
- 4000  Computer Support
- 7890  ASB Computer Sprt
- 1936  Ben Holmes (CSR)
- 9596  Mark Wright
- 8353  Eric Hansen
- 801-372-0485 (cell)
- 801-420-7689 (cell)

### Admin VP & CFO
- 3760  Katy Clark
- 3760  Steve Hafen


Phone System

Ordering a Phone Line

Lynette will help you order a phone line during your FS Orientation, but you are welcome to order it yourself if you would like to do so.

Click here to 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 line

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

Click here to download a PDF campus directory.

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

Alan Moose
Asst Administration VP Finance
Asst Administration VP Finance

Joel Christensen
Budget Office
Dir University Budgets

Lynette Cummings
AAVP Finance Office
Admin, Asst., Financial Svcs.

Kevin Walker
Regulatory Accounting-Reporting
Dir Regulatory Acctg & Reprtng

Brian Blum
Student Financial Services
Dir Student Financial Services

David Paul
Treasurer’s Office
University Treasurer

John Leatherwood
Financial Acctg and Rptg
Dir Financial Acctg & Rptg

Budget

Joel Christensen
Budget Office
Dir University Budgets

Salani Pita
Budget Office
Budget Analyst V
Accounts Payable

Scott Campbell
Accounts Payable
Acting Acct Payable Mgr

Shelby Barney
Accounts Payable
Accounts Payable Specialist

Nancy Wilson
Accounts Payable
A/P Supervisor

Payroll

Chris Shawcroft
Payroll
Acting Payroll Manager

Karen Whipple
Payroll
Payroll Specialist

Jennifer Lund
Payroll
Payroll Specialist

Pam Wilson
Payroll
Sr. Payroll Specialist II
Office Locations

AAVP Office
Alan Moose (B-355 ASB)
Lynette Cummings (A-153 ASB)

Accounts Payable  (B-280)
Nancy Wilson
Scott Campbell
Shelby Barney

Administration VP  (B-346)
Katy Clark
Steve Hafen

Budget  (D-208)
Joel Christensen
Salani Pita

Financial Accounting  (B-353)
John Leatherwood

Financial Acctg & Reporting  (C-248)
Ben Wake
Larry McFerson
Marshall Chamberlain
Rebecca Harrison
Ryan Wells

Grants & Contracts Acctg  (A-261 ASB)
Andrew Neil
Cherylnn Aamodt
Corbin Emerick
David Morris
Nathan Dunnigan

Payroll  (D-55)
Chris Shawcroft
Jennifer Lund
Karen Whipple
Pam Wilson

Regulatory Acctg & Reporting  (C-233)
Kathleen Rugg
Kevin Walker
Marva Yapias
Sheri Sechler
Terilee Hutchings

Student Financial Services  (A-153)
Brandon Dailey
Brian Blum
Crystal Frazier
Glenda Tolman
Heather Topance
Kali McCleary
Lori Glenn
Tiffany Hawkins

Tax Office  (B-280 ASB)
Paul Larsen
Preston Back
Maria Bateman

Treasury Services  (A-153)
Braden Stohlton
Brent Shutt
Cyndi Sederholm
Dane Larsen
David Paul
Gene McMurtrey
Jon Hardy
Sabrina Warren
Steve Morley
Tammy Miner

Program Granite  (Crabtree Building)
Andy Cluff
Craig Larson
David Nichols
Shannon Kelly
Mike Blackhurst
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.

<table>
<thead>
<tr>
<th>Location</th>
<th>Office/Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAVP Office (Front Desk) – A-153 ASB</td>
<td>Regulatory Accounting &amp; Reporting – C-233 ASB</td>
</tr>
<tr>
<td>Accounts Payable – B-280 ASB</td>
<td>Student Financial Services – A-153 ASB</td>
</tr>
<tr>
<td>Budget – D-208 ASB</td>
<td>Tax Office – B-280 ASB</td>
</tr>
<tr>
<td>Financial Accounting &amp; Reporting – C-249 ASB</td>
<td>Treasury Services – A-153 ASB</td>
</tr>
<tr>
<td>Grants &amp; Contracts Accounting – A-261 ASB</td>
<td>Alan Moose (Asst. Admin VP) – B-355 ASB</td>
</tr>
<tr>
<td>Payroll – D-55 ASB</td>
<td></td>
</tr>
</tbody>
</table>
Professional Development

Financial Services encourages employee development. Some options for training are listed below. Sometime in the next few weeks talk to your supervisor about 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 training.byu.edu with your BYU netID and password and look for the courses you are interested in learning. If you have any questions about the new system, please email training@byu.edu. Online courses are a great investment in your development!

**LinkedIn Training**
All BYU Employees have access to LinkedIn Learning. Use Your BYU email to log in. Human Resource Development has a list of recommended courses at hrd.byu.edu/linkedin-training. If you have problems getting in, contact OIT at 2-4000.

**Software Training**
Learn to use popular software from Adobe, Microsoft, and others. There are a variety of courses you can take. To register visit lib.byu.edu/services/software-training.

**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. Email dane_larsen@byu.edu to be added to the email list.

**Controller Group Meetings**
These meetings are held every other month. Their purpose is to give financial updates to employees across campus. All Financial Services employees are invited to attend these meetings on Zoom. A calendar invite will be sent to you a month before each meeting.

**Off-Site Training**
Funds are available for employees to attend conferences and other off-site training. If you are interested in this type of training, speak to your supervisor.
Awards
You can nominate your fellow employees for the following awards.

**SAERA Award**
The BYU President’s Council has adopted a set of values for all BYU staff and administrative employees. The Staff and Administrative Employee Recognition Awards recognize the demonstration of these values for all BYU staff and administrative employees.

Throughout the year employees (including part-time Category I and II) can be nominated by co-workers in their own or other departments, supervisors, or faculty members. This can be done by accessing the nomination form at saera.byu.edu.

**Student of the Semester**
Each semester all full-time employees in Financial Services are invited to nominate outstanding student employees for this award so be on the lookout for someone you can nominate.

**Cougar Cash Coupon**
If you want to show appreciation for any full-time or student employee, you can give them a cougar cash coupon. They can be obtained from Lynette or her student employees in A-153.

Training

**Required Trainings**
Be sure to do the following required training within your first two weeks of employment.
- Sexual Harassment Prevention for Employees
- Information Security and Privacy Essentials

[Welcome.byu.edu/first-week](https://welcome.byu.edu/first-week)

**Basic Financial Training**
To get a basic idea of how BYU financials work, complete the basic financial training found in the Financial Services catalog on training.byu.edu.

**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.
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

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

My BYU Website
Links can be added to my.byu.edu by clicking on the "Add Links" button at the bottom of the page. Some items to add are listed below, but there are many others available. Take a minute and look through them.

- Cell Phone Services
- DMBA
- Employee Wellness Program
- Parking Registration
- Sick & Vacation Balances
- University Org Chart
- University Policies/Procedures
- UTA Bus Pass
- Cougar Cash
- Email Alias Manager
- Financial Services
- My Financial Services
- Personal Information
- Simply Travel
- View Paycheck
- W-2 View/Print, Consent
This is a list of policies used by Financial Services, and it is recommended that you review them. These and all university policies are found at [policy.byu.edu](http://policy.byu.edu). Be sure to check out the procedures.

**Those where Financial Services is the “Responsible Office” include:**
- Accounts Receivable Policy
- Asset Write-Off Policy
- Budget Policy
- Business Gifts and Entertainment Policy
- Cash and Cash Equivalents Policy
- Check Cashing Policy
- Disposition of University Collections Policy
- Financial Accounting Policy
- Independent Contractors Policy
- Inventory of Products and Supplies Policy
- Meals and Hosting Policy
- Memberships, Dues, and Subscriptions Policy
- Merchant Credit Card Policy
- Moving Policy
- Payroll Policy
- Sales Tax Policy
- Tuition and Fees Policy

**HR and others to also become familiar with are:**
- Administrative and Staff Employment Policy
- Administrative and Staff Employee Leaves Policy
- Administrative and Staff Employee Discipline Policy
- Administrative and Staff Employee Grievance Policy
- Advertising, Selling, Soliciting Policy
- Catering and Food Distribution Policy
- Compensation Policy
- Conflict of Interest Policy
- Employee Termination Policy
- Employee-Vendor Policy
- Fraud Policy
- Financial Conflict of Interest in Sponsored Research Policy
- Legal Documents Policy
- Out-of-State Work Policy
- Post-retirement Employment Policy
- Purchasing Policy
- Risk Management and Safety Policy
- Staff Overtime Policy
- Student Employment Policy
- Supplemental Compensation for Administrative Employees Policy
- Surplus Property Policy
- Travel Policy
- University Fund Raising Policy
- University Personnel Tuition Policy
- Workweek for Employees Policy

**Y-Time (Staff Employees)**

Navigate to [training.byu.edu](http://training.byu.edu) and go to the Financial Services catalog. Enroll in and complete the following trainings.

- Adding Y-Time for Mobile
- Using Y-Time for Mobile
- Staff Members can also add their sick/vacation time using the mobile app.

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

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

Do the following to schedule rooms for meetings or events

Add the room as an attendee using Scheduling Assistant in Outlook:
- B-52 ASB (ASB_52)
- B-354 ASB (B354_ASB)

Call Campus Scheduling at 2-3134 to schedule the following rooms:
- A-203 ASB
- C-245 ASB
- Rooms in the Wilkinson Student Center

Go to hinckleycenter.byu.edu/reservations 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 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.
  - 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

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1042-S</td>
<td>Foreign Person Tax Form</td>
</tr>
<tr>
<td>1098-T</td>
<td>Tuition Tax Form</td>
</tr>
<tr>
<td>AP</td>
<td>Accounts Payable</td>
</tr>
<tr>
<td>AR</td>
<td>Accounts Receivable</td>
</tr>
<tr>
<td>BAC</td>
<td>Budget and Appropriations Committee</td>
</tr>
<tr>
<td>BISC</td>
<td>Bank Information Security Compliance</td>
</tr>
<tr>
<td>BOB</td>
<td>Business Objects</td>
</tr>
<tr>
<td>CBO</td>
<td>Church Budget Office</td>
</tr>
<tr>
<td>CES</td>
<td>Church Educational System</td>
</tr>
<tr>
<td>CNA</td>
<td>Capital Needs Analysis</td>
</tr>
<tr>
<td>COL</td>
<td>Collections</td>
</tr>
<tr>
<td>CSR</td>
<td>Computer Support Resource</td>
</tr>
<tr>
<td>CUBS</td>
<td>Church Unit Banking System</td>
</tr>
<tr>
<td>ECSI</td>
<td>Third party loan processor</td>
</tr>
<tr>
<td>ERP</td>
<td>Enterprise resource planning</td>
</tr>
<tr>
<td>F&amp;A</td>
<td>Facilities &amp; Administrative Costs: overhead costs charged to award sponsors to cover indirect costs (i.e. electricity, laboratory space, custodial, etc.)</td>
</tr>
<tr>
<td>FACTA</td>
<td>Fair and Accurate Credit Transactions Act</td>
</tr>
<tr>
<td>FAR</td>
<td>Federal Acquisition Regulation: rules regarding Federal government procurement</td>
</tr>
<tr>
<td>FERPA</td>
<td>Family Educational Rights and Privacy Act</td>
</tr>
<tr>
<td>FRA</td>
<td>Financial Responsibility Agreement</td>
</tr>
<tr>
<td>FS</td>
<td>Financial Services</td>
</tr>
<tr>
<td>FT</td>
<td>Full-Time</td>
</tr>
<tr>
<td>FTE</td>
<td>Full-Time equivalent</td>
</tr>
<tr>
<td>GCA</td>
<td>Grants &amp; Contracts Accounting (Research Accounting)</td>
</tr>
<tr>
<td>HIPA</td>
<td>Health Information Privacy</td>
</tr>
<tr>
<td>IROP</td>
<td>Internal Record of Purchase (PDF receipt for CUBS/MME)</td>
</tr>
<tr>
<td>ITD</td>
<td>Information Technology Development</td>
</tr>
<tr>
<td>ITI</td>
<td>Information Technology Infrastructure</td>
</tr>
<tr>
<td>ITS</td>
<td>Information Technology Software</td>
</tr>
<tr>
<td>JE</td>
<td>Journal Entry</td>
</tr>
<tr>
<td>LDSP</td>
<td>LDS Philanthropies</td>
</tr>
<tr>
<td>LMS</td>
<td>Learning Management System</td>
</tr>
<tr>
<td>LOC</td>
<td>Letter of Credit: given to BYU to obtain reimbursement of $ spent from various Federal Agencies</td>
</tr>
<tr>
<td>MFC</td>
<td>My Financial Center</td>
</tr>
<tr>
<td>MME</td>
<td>Money Movement Engine</td>
</tr>
<tr>
<td>NACUBO</td>
<td>National Association of College and University Business Officers</td>
</tr>
<tr>
<td>NRA</td>
<td>Non Resident Alien</td>
</tr>
<tr>
<td>OCR</td>
<td>Off Campus Receivables</td>
</tr>
<tr>
<td>OCS</td>
<td>Off Campus Scholarships</td>
</tr>
<tr>
<td>OGC</td>
<td>Office of General Council</td>
</tr>
<tr>
<td>OIT</td>
<td>Office of Information Technology</td>
</tr>
<tr>
<td>OMB</td>
<td>US Office of Management and Budget</td>
</tr>
<tr>
<td>PCI</td>
<td>Payment Card Industry</td>
</tr>
<tr>
<td>PI</td>
<td>Principal Investigator: lead researcher on a sponsored research project</td>
</tr>
<tr>
<td>PMS</td>
<td>Payment Management System: used by HHS, NASA, USDA and BYU to receive funds and report to Federal Agencies</td>
</tr>
<tr>
<td>PS</td>
<td>Peoplesoft</td>
</tr>
<tr>
<td>PT</td>
<td>Part-Time</td>
</tr>
<tr>
<td>RAO</td>
<td>BYU’s Research Administration Office</td>
</tr>
<tr>
<td>RPA</td>
<td>Robotic Process Automation</td>
</tr>
<tr>
<td>SDM</td>
<td>Service Delivery Model (Workday)</td>
</tr>
<tr>
<td>SDR</td>
<td>Semi-annual Department Review</td>
</tr>
<tr>
<td>SFS</td>
<td>Student Financial Services</td>
</tr>
<tr>
<td>SHP</td>
<td>Student Health Plan</td>
</tr>
<tr>
<td>SOL</td>
<td>Statute of Limitations</td>
</tr>
<tr>
<td>STL</td>
<td>Short Term Loan</td>
</tr>
<tr>
<td>SUA</td>
<td>Single Use Account</td>
</tr>
<tr>
<td>UBIT</td>
<td>Unrelated Business Income Tax</td>
</tr>
<tr>
<td>UG</td>
<td>Uniform Guidance: Regulations from the US Office of Management and Budget that govern federally sponsored awards.</td>
</tr>
<tr>
<td>UI</td>
<td>User interface</td>
</tr>
<tr>
<td>WACUBO</td>
<td>Western Association of College and University Business Officers</td>
</tr>
</tbody>
</table>

### Acronyms for Common Sponsors of Research Projects:

- **DED** – US Dept of Defense
- **DOE** – US Dept of Energy
- **DOI** – US Dept of the Interior
- **DOJ** – US Dept of Justice
- **DOT** – US Dept of Transportation
- **ED** – US Dept of Education
- **HHS** – US Dept of Health and Human Services
- **NASA** – National Aeronautical and Space Administration
- **NIH** – National Institutes of Health
- **NSA** – National Security Agency
- **NSF** – National Science Foundation
- **USGS** – US Geological Survey
- **USDA** – US Dept of Agriculture
- **VA** – US Dept of Veterans Affairs
Evacuation Plan

ASB General Evacuation Instructions
1. Emergency Coordinators should identify individuals who may need special assistance in evacuating from the building. Have a plan for specific needs. (The Emergency Coordinator for Financial Services is Lynette Cummings.)
2. The evacuation will be initiated by the sounding of the building fire alarm.

Please follow the steps below:

• Immediately exit the building following the evacuation route for your floor and office as indicated on the included floor plans. Assemble at your organization’s indicated location (see page 30).

• Organizations with special requirements must follow their own established procedures. For example, secure all cash before exiting. If this is a real emergency the special procedures shall be suspended and exiting should be immediate.

• If possible, assigned Emergency Coordinators should make sure area is cleared before exiting.

• Emergency Coordinators should carry a list of all personnel in their areas (including student employees). This list will be used to account for all organization members once all are in the designated assembly areas.

• Once all personnel have arrived at the assembly area, the Emergency Coordinator will take role from the employee list and provide it to the Emergency Supervisor who will be located at the fountain directly north of ASB and wearing an orange vest.

• When all roles have been turned in to the Emergency Supervisor, a verbal all clear will be given and personnel may return to their offices.
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