

What's New . . .

January 2021

Business Managers' Meetings

The next Business Managers' Meeting is scheduled for Thursday, March 11th, 2021, at 9:00 a.m.

If you would like to present at a future Business Manager Meeting or have suggestions for helpful content, contact Jessica Winet-Fleer at jessica.winetfleer@slu.edu. We would love to hear about best practices in your area as others could benefit as well.

Controller's Office

Please take note of the University's updated internal audit recommendation (attached). Business managers will need to implement an audit protocol this quarter if not already performing reviews on a quarterly basis or better. David Heimburger will be discussing this at an upcoming cabinet meeting so your department heads will all be aware and should reach out to you about it, but don't be afraid to initiate the conversation. Feel free to reach out to Fred Winkler with questions. We are in a difficult financial period at the University and it is imperative that we all ensure that funds are being used properly. Thanks for your support.

Human Resources

Check Your Benefits Elections

New Year, New You? Many employees made benefit election changes during open enrollment this past year. Please encourage your unit's faculty and staff to check their benefits in the new year to make sure any changes have carried over into the 2021 year.

Contact Information Review

It's important to review your personal and work contact information on a regular basis. With the start of the new year, important documents such as benefits cards and Tax Statements may be mailed to your permanent address listed in Workday. If you have moved or if you just want to verify the accuracy of your contact information, please log into Workday>Personal Information and View or Change your respective contact info.

W-2 Electronic Delivery

Human Resources is encouraging all employees to *sign up for electronic delivery of W-2 statements by January 11th* for faster and easier access to the tax documentation. Elections did not carry over from Banner to Workday in the migration so those who do not proactively make the election will receive a paper copy of the document.

Contingent Workers

Human Resources will be asking for Business Manager assistance with a new project focused on contingent workers within Workday. This project will expand the number of contingent workers to include guest accounts so that we provide required training and help automate onboarding processes for these individuals.

New Training Videos and Upcoming Programming for Business Managers

Over the past few months, we have been working to provide live and on-demand training on the topics you have requested. In November, the Medical School Finance team hosted several excellent training sessions. In December, the Business Manager meeting focused on several new Workday demonstrations. This month, Human Resources and Business & Finance have released two new videos designed specifically for SLU Business Managers.

- [Purchasing Policies at SLU](#): This eight-minute video will help you to understand and apply SLU's current purchasing policies when sourcing competitive bids, creating purchase orders and managing relationships with University suppliers.
- [Hire and Onboarding for Business Managers](#): This ten-minute video provides an overview of the Hire and Onboarding HCM process. Participants will understand and be able to communicate where an employee is within the Hire and Onboarding business process.

These training sessions and videos are a small piece of a larger training program to support Business Managers. We know that your role is complex, dynamic, and vital to SLU's success. A project team including representatives from Human Resources, Business & Finance, as well as several Business Managers, has already started designing a training calendar with more content for 2021. We look forward to sharing these resources with you soon.

Central Processing

P Card - basic card information in Workday

From the Workday Home page, the cardholder can click on their profile (their picture on the right) then on the left click on More (at the bottom) and Company Property



to see card details such as limits, expiration date and last 4 digits.

Question on the payment status for one of your payments?

Find Supplier Payments Status report in Workday provides payment status as well as various data related to your payments such as payment date, payment type, invoice #, reference #, all of which are filterable.

Searching for a specific transaction in Workday?

Enter the INVREQ#, RQ#, or SINV# in the Workday Search bar and hit enter.

On the left under Categories click All of Workday at the very bottom.

Click on the hyperlink to see the transaction.

ACH Direct Deposit is the University's preferred form of payment and all suppliers should be given the Direct Deposit Authorization Form to complete, available on the B & F Documents & Forms google site.

Upcoming Concur Q & A session:

January 19th at 10:00 a.m.

Register via Skillsoft

Zoom invite to be sent



Financial Report Updates

New Reports:

Budget vs Actual SLUCare – Org Selection

This report displays Budgets vs Actuals by Organization, for SLUCare cost centers, MTD & YTD. It allows you to drill down to department and cost center within one report. End-users will be able to view information by specific plan structures, plan name, fiscal periods, and specific worktags.

Can select different organizations to display as columns in the report. (ex. Program, Specialty, Grant, or Cost Center).

Income Statement Projection – SLUCare

Shows YTD Trend Actuals then Budget to project the YTD estimates for Net Income. Compares Budget, Forecast, and Actuals.

Income Statement Trend by Org

Shows a monthly trend of the income statement with a total. The periods in the trend can be selected to show Year to Date, Last 12 months, last 3 months, etc.

Enhancements made to the following reports:

Journal Lines by Org

Budget vs. Actual

Budget vs. Actual – SLUCare

Prompts:

- Added Book Code and Fund as a prompt

Drill Down changes:

- Changed Debit and Credit columns to only show Net Amount
- Will not display empty columns
- Cleaned up Drill Down options on Budget
- Added Cost Center Hierarchy L5 to Budget

Accounts and Business Processes Changes

New Accounts:

Ledger Account: 1991 Scholarship Clearing

Function: New SLUCare Dimensions (CART) and new CART Hierarchy additions

Business Process Changes:

Accounting Journal Event: Concur files – removed approvals within each step of this process, since they are already approved in Concur

Office of Compliance + Ethics



The Saint Louis University Integrity Hotline is available as a confidential, toll-free resource for anyone with a concern regarding business, billing, and/or ethical practices in his or her department. Anonymous or self-identified reports of any nature can be made to the Integrity Hotline at **1-877-525-5669**. Additional information and FAQs regarding the Integrity Hotline can be found at the Office of University Compliance and Ethics homepage. See attached link: <https://www.slu.edu/compliance-ethics/hotline.php>.