D | Finance & Admin Update

The latest news, updates, and announcements from Finance, Finance Centers, Campus Services, Human Resources, Information, Technology & Consulting, Integrity & Compliance, Internal Controls Services, and Safety & Security
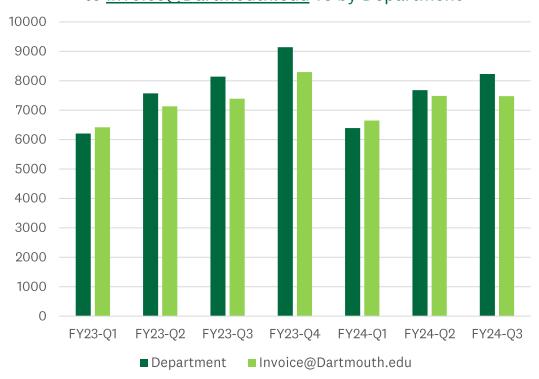
Chart of the Month

Number of Payment Request eForms Submitted to Invoice@Dartmouth.edu vs by Department

Legend: ■ Department ■ Invoice@Dartmouth.edu

Source: Finance OnBase Data Metrics July 1, 2022 – March 31, 2024

Upcoming Dates

Agiloft Contract Management Training
Thursday, April 18, 1:30 - 3:15PM
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Spring Finance Information Forum
Thursday, April 25, 9:00 – 10:00AM
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Dartmouth Finance Collaborative
Wednesday, May 1, 9:00 – 10:00AM

Check out page 2 for more Upcoming Dates and Events

As a reminder: for the most efficient processing, vendors should submit invoices for payment by email to invoice@dartmouth.edu. A Payment Request eForm will be created on the Departments behalf and sent to the Department Contact. Additionally, please remind vendors that invoices should clearly state the following:

- Business Name or D.B.A on Payment Works record
- Invoice Number
- Invoice Date
- Bill to: Dartmouth College
- Contract Number
- Purchase Order Number
- Work Order Number
- Department Contact
- Date(s) of Service
- Descriptions of goods or services provided

Encourage vendors to review the Submitting Invoices site within the Vendor Guide.

Welcome to Dartmouth our New Team Members!

Ladda Marshall, Supplier Diversity Program Manager, Procurement Services

Kelley O'Rourke, Associate Athletic Director, People and Culture, Human Resources

Susan Sinclair, Retirement Plan Manager, Benefits, Human Resources

David Sprague, Stockroom Operator, Procurement Services

Judith Todd, Senior Budget Analyst, Financial Planning

Upcoming Dates and Events

Student Employee Appreciation Week

This Week: April 15 – 19

Join us in celebrating the contributions of our student employees! Go to the Student Employment Office Student Appreciation Week page for details and ways you can recognize your student employees. Also, encourage your students to join us in celebration and fun at the Student Employees Festival at Collis Common Ground on Tuesday, April 16th, from 3:00 – 5:00PM.

Agiloft Server Migration and Outage

The Weekend of April 19 – April 21

Agiloft is migrating the Dartmouth Contract Management System and System Access to a new AWS server this coming weekend. During this time the Agiloft system will be unavailable. The system is expected to be backup and operational by Monday, April 22nd.

Please monitor the ITC Status Page or better yet, click the "Subscribe to Updates" to receive ITC system notifications directly in your email inbox.

Spring Term Student Employment End Dates

Student employers! The academic and fiscal year end is coming. The last possible end dates for student employment for 2023-2024 are as follows:

Graduating International Students: June 4, 2024
All Other Graduating Students: June 8, 2024
Continuing Students *(not graduating)*: June 22, 2024

Title IX Training

All faculty, staff, postdoctoral scholars, and graduate and professional students should have received an email from Dartmouth College with "Dartmouth College Vector Assigned Trainings" in the subject line. Title IX training is required annually but the content varies from year to year.

This year's module is "Building Supportive Communities: Taking Action". It reviews previous material and discusses various ways you can take action. Training is required to be completed by June 30, 2024. For more information go to Title IX's Online Trainings.

Agiloft Contract Management Training
- Thursday, April 18, 1:30 - 3:15PM
- Thursday, May 16, 1:30 – 3:15PM

Spring Finance Information Forum

Thursday, April 25th, 9:00 – 10:00AM

Register to join the Spring Finance Information Forum to get the latest updates on projects, policies and process changes; ask questions and provide feedback.

Don't forget to checkout: BIG | THINK +

Wednesday, May 1, 4:30 – 6:30PM *(reception to follow)* Hanover Inn

Join us in honoring our colleagues and community members who are leading efforts to advance social justice and foster a more equitable community at this year's Social Justice Awards.

Keynote Speaker: Dr. Joy Buolamwini, researcher, artist, AI bias expert, bestselling author of *Unmasking AI* and founder of the Algorithmic Social Justice League.

This event is free and open to the public. Advance registration is requested. Click here to Register.

If you have questions or need further information, please contact us at IDE.Events@dartmouth.edu.

Finance & Administration Closed May 3rd

On Friday, May 3rd, Finance & Administration will be closing at 11:00AM for our Spring Professional Development Event. This includes Finance, Finance Centers, Human Resources, and Internal Controls.

In preparation, please submit any PCard transactions sweeping on Friday, May 3rd, no later than Wednesday, May 1st. The Finance Centers will do all they can to get all transactions processed before they close for the week.

Operations will resume as normal on Monday, May 6th. Final April reports will be available Tuesday, May 7th.

OnBase Unity Client: Getting Started
- Wednesday, May 8th, 9:00 – 10:00AM
- Wednesday, June 12, 9:00 – 10:00AM

Policy & Process Updates

Clarification on 20 Percent Gratuity

Within the Lodging, Meals, and Entertainment section of the Business Expense policy, it states that a tip or gratuity of no more than 20% is considered reasonable and reimbursable. To clarify, employees should strive to stay within the 20% reasonableness threshold, but we also recognize that out of convenience, rounding the tip up to the nearest whole dollar is also reasonable, even if it results in a tip being slightly over the 20% threshold.

Procurement Card Compliance

The Procurement Card Policy has been updated to clarify the requirement of submitting the PCard eForm and the supporting receipts to the appropriate department reconciler or Finance Center before the sweep date. Failure to report or document any purchase within the specified timeframe will be deemed non-compliant and may result in loss of PCard privileges.

Graduate Student Stipends

The guidance on How We Pay Students for stipends has been updated in order to clarify the appropriate natural class and payment method for Graduate Student Stipends.

All Graduate Student Stipends should be paid through Payroll on a General Request eForm or directly on a PASF and expensed to natural class 7005-Pre-doctoral Fellowships unless it is student wages and expensed to natural class 6261-Graduate student.

Undergraduate Internships and Fellowships should be paid through Accounts Payable on the Payment Request eForm and may be expensed to either natural class 7002-Internships or 7005-Pre-doctoral Fellowships.

Additionally, non-student, Post-doc Fellowships should be paid through Payroll and expensed to natural class 7006-Post-doc Fellowships.

Tips to Avoid eForm Errors

Avoid Special Characters

When entering contents within fields, such as Business Purpose, Descriptions, Comments and Note fields, avoid using special characters (e.g. #%&!*). Special characters can sometimes conflict with the code on the backend of the eForms and cause the form to have errors as it is being processed.

This can frequently happen when copying and pasting product details or other descriptions from a website into the eForm. It is fine to copy and paste but remove any special characters from the pasted text.

Avoid Adding Over Nine Approvers or Eight Chart Strings or Transaction Lines

Finance eForms will error or mix up your data if you exceed nine approvers or chart string lines. Department Admins have a chart string org automatically populated on the eForm in the Additional Department Admin Access field. This uses up a chart string line to maintain access to the form, so adding more than eight chart strings will cause issues on the form.

For PCard eForms, keep the number of transactions reported on a single form below eight, but even limiting the number of transactions on a form to one or two helps the Finance Center more quickly and efficiently process and complete these forms.

For any other eForm type (Payment Request, Corrections, Journals, and Transfer, Expense Report Request, Purchase Request, MYLS, or Wage Transfer), If you have more than eight chart string lines, it is best to add a spreadsheet with the chart strings and amount allocations and reference the spreadsheet in the Comments field. The Finance Center can easily transition a Payment Request to a loadable ADI for AP and work from the spreadsheet for other transaction types.

If you have more than nine approvers on a single eForm, you can either upload an approval email from each approver or you can work with your Finance Center to help shepherd the eForm through the approval process.

Volunteer Time Off Policy Update

The Dartmouth Volunteer Time Off Policy has been updated to expand eligible nonprofit organizations beyond those affiliated with United Way. To be eligible the nonprofit organization must not discriminate based on any category protected by applicable law.

Employees must request time off from their supervisor with reasonable advance notice and complete the online Volunteer Time Off Tracking Form within three business days. Hourly employees will use **VOL** pay code when tracking their hours in Kronos. For more information on the Volunteer Policy, eligibility, tracking and finding volunteer opportunities, go to Volunteer Time Off site on the Human Resources website.