

## *What's New . . .*

December 2021

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### **Business Managers' Meetings**

The December Business Managers' Meeting has been cancelled. The next Business Managers' Meeting is scheduled for Thursday, March 10, 2022, 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. We would love to hear about best practices in your area as others could benefit as well.

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### **Financial Planning & Budget**

#### **Finding Budget Amendments**

There are two ways to review budget amendments:

1. Type 'Find Budget Amendments for Organization' to locate all budget amendments for a specified cost center/program/project.
2. Run the 'CR – FIN - Budget vs Actuals by Org' report.
  - In the 'Revised Budget' column, click on the arrow to the right of the amount in an adjusted spend category.
  - Once the 'View By' window opens, select 'Budget Amendment'.
  - All related budget amendments will be displayed.
  - Click on a budget amendment to view the details.

### **Treasury & Investment**

#### **2022 PCI Training**

Faculty and Staff that handle, process, or encounter cardholder data at Saint Louis University are required to complete an annual PCI compliance training. The annual PCI training will be distributed via email to faculty and staff in January 2022.

As a reminder, Merchant Managers are responsible for managing merchant processing for their respective area and ensuring all individuals complete PCI training prior to handling or processing credit card data and annually thereafter. In addition, Merchant Managers are required to maintain a current listing of employees who process or handle credit or debit card data. This listing must be emailed to [merchantservices@slu.edu](mailto:merchantservices@slu.edu) by December 15<sup>th</sup> on an annual basis.

For questions, please contact Maggie Workman at 314-977-7073 or email [merchantservices@slu.edu](mailto:merchantservices@slu.edu).

## **Business Services**

### **Workday Receipt Security**

Additional users are now able to create receipts for purchase orders in Workday. If a purchase order has various users who assisted in creating the PO, all users will be able to create a receipt on the PO. This includes: the requisition Requester, the Sourcing Buyer, and the PO Buyer. Users in the Cost Center Approver \$5K role can also create receipts for POs in their cost center(s). To create a receipt, users can use the "Create Receipt" task and enter the purchase order number. Training will also be offered on the "Create Receipt" function and the expanded security roles in early 2022. If you have any questions regarding this change or experience any issues with the "Create Receipt" task, please contact [billikenbuyadmin@slu.edu](mailto:billikenbuyadmin@slu.edu).

### **Agiloft Announcement**

Starting this week, please begin directing Agiloft related questions, along with new user onboarding requests, to [agiloftsupport@slu.edu](mailto:agiloftsupport@slu.edu). This is the new, centrally managed administrator email inbox for assisting contract management system users.

### **\$129 Winter Rate at the Chase Park Plaza**

The Chase Park Plaza is offering a discounted winter rate for SLU sponsored stays as well as personal stays for SLU faculty and staff. From December 1, 2021- March 31, 2022, standard rooms at the Chase are \$129/night, plus applicable taxes and fees. Amenities and a link to reserve can be found on the attached flyer. For additional questions, please reach out to Ellen Borowiak ([ellen.borowiak@slu.edu](mailto:ellen.borowiak@slu.edu)).

## **Central Processing Reminders**

- Review POs for remaining encumbrance balances that can be closed due to no longer being needed, cancelled items, etc. Email [accountspayable@slu.edu](mailto:accountspayable@slu.edu) with the PO#s to close.
- For goods and services received, remember to perform the receiving function in Workday timely.
- Send all invoices received and credit memos received from the supplier to [accountspayable@slu.edu](mailto:accountspayable@slu.edu) when received.

## **Workday Financials**



Questions or Issues with Workday Financials? Contact [wdfinance@slu.edu](mailto:wdfinance@slu.edu)

### **Workday Financials Office Hours**

We will be holding open office hours once a month and will answer any of your questions relating to Workday Financials (i.e. Financial Reporting, FDM, Accounting, Invoices, Purchasing, Grant Accounting, general navigation, or any other financial topics).

Below are the current scheduled dates and registration links:

- **Dec 15th @ 9:00am – 10:00am**

<https://slu.zoom.us/meeting/register/tJUocO6vqTojGNdTvXmklh5nvVj9SJCmhWrf>

- **Jan 13th @ 9:00am – 10:00am**

[https://slu.zoom.us/meeting/register/tJArdu2urzluEtEJE5H\\_hg8U\\_DGagUeU97ob](https://slu.zoom.us/meeting/register/tJArdu2urzluEtEJE5H_hg8U_DGagUeU97ob)

### **Workday Financial Accounting Structure Updates**

- New Spend Category
  - 'SLUCare Payable - for SLUCare Accounting Purposes Only'
    - posts to Ledger Account 2001: Accrued Liabilities
    - to be used as directed by SLUCare Finance
- New Ledger Account
  - 2007 Other Short Term Accrued Liabilities

### **Workday Financial Reporting Updates**

#### ***New Reports:***

- **Fund Analysis by Grant**
  - The purpose of this report is to review items that are tagged to a grant but are not hitting the appropriate Fund 31.

#### ***Report Updates:***

- **Grant Revenue & Expense Analysis by Org**
  - Added additional columns that now show all accounting transactions related to the grant, regardless of if they are appropriately tied to an approved award to assist in grant analysis.
- **Contract and Related Customer Invoices**
  - Added the effective date of the contract as a column in the report as well as added starting and end date prompts.
- **Budget vs Actual by Org**
  - Added budget amendment to drill down.
- **Asset Net Book Value**
  - Added a column for Useful Life, Remaining Useful Life, Location, Superior Location.

#### ***Reports in Progress:***

- **Statements for Big Book**
- **SLUCare Black and Red Report (*Currently in testing*)**
  - Added Revenue Category and Sales Item to prompt. This allows the team to use the report to analyze at a more granular level if needed.

### **Human Resources**

Last month we focused on **Reviewing, Updating and Managing Goals in the Self-Evaluation** phase. All past sessions can be found in the "Business Manager" folder in SkillSoft. Click **here** for a complete list of past sessions and access the recordings.

This month, we are pleased to announce a session on:

**Business Manager Training: Keep your department's performance reviews on track: How to edit goals in the manager-evaluation phase of the year-end review.**

December 8, from 9:00 am-10:00 am

Course Description:

This course will demonstrate the process for making sure that all goals are current, correct, and complete once the year-end review has been advanced from the self-evaluation phase to the manager-evaluation phase.

At the conclusion of this course, participants will know:

- How to remove unwanted goals from a review.
- How to perform a manual send-back of a review.
- The process by which goals are edited during the manager evaluation.

**2021 Year End Review**

The 2021 Year End Reviews were launched on November 30. All staff with a start date on or before September 30 should have received a self-evaluation in their Workday inbox.

***Key Milestones***

- November 30: Self-evaluations are available for all qualifying staff
- January 17: All in-progress self-evaluations will be closed and advanced to the manager rating phase
- February 28: All 2021 Year End Reviews should be complete

***Upcoming Support***

Please remind your department staff to review their goals to ensure that they are current, correct, and complete. One of the key takeaways we heard during the first two evaluation cycles in Workday, is that evaluations are much easier when they contain the right goals for the right employees. Inaccurate or outdated goals were a major challenge for completing both self-evaluations and supervisor evaluations during the 2020 Year End Review.

If anyone in your department needs assistance, Human Resources is here to help. During the month of December, we will be offering Open Office Hours with Workday Performance experts who can help you troubleshoot your specific Workday problems and answer questions.

- Thursday, December 9, from 10:00 am-11:00 am  
([Click Here](#) to join the office hours)
- Thursday, December 16, from 10:00 am-11:00 am  
([Click Here](#) to join the office hours)

**Recruiting Reminders**

- Offer Development:
  - When developing internal offer amounts, please refer to the university [Salary Administration guidelines](#).
  - Hiring Managers and Business Managers should not communicate offer amounts/proposed offer amounts or set offer expectations with potential new hires until after offer requests have been submitted in Workday and reviewed by HR.

- If you feel offer scenarios require highlighted consideration, please partner with your HR recruiter or HR Consultant for review and planning.
- Interviewing Candidates:
  - The candidate market is trending toward decreased applicant pools. There is an increase of candidate drop offs/ “no shows” for confirmed interviews. It is recommended to prioritize interview scheduling, initiate quick contact with applicants and speed up the interview and decision-making process.
- New Hires/Onboarding:
  - To decrease the possibility of a new hire “no show,” upon offer acceptance, make frequent contact with your new hire to keep the new hire engaged – welcome emails, weekly check in phone calls, and devise a pre-onboarding communications and outreach plan.

### **Compensation Adjustment Reminders**

Compensation adjustments typically occur during the merit review cycle. However, in the fast-moving and ever-changing external and internal work environments in which we work there may be circumstances where a division or college believes an out of cycle compensation adjustment may be appropriate.

University procedures require analysis of these requests to ensure fair and equitable compensation practices are occurring across the institution. A division or college may consider a decision appropriate for their individual college or division, but laws that govern fair employment practices require these decisions to be made with consideration to the entire institution. In these circumstances the college business manager should reach out to their assigned HR Consultant to initiate discussions on the topic.

### **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>.

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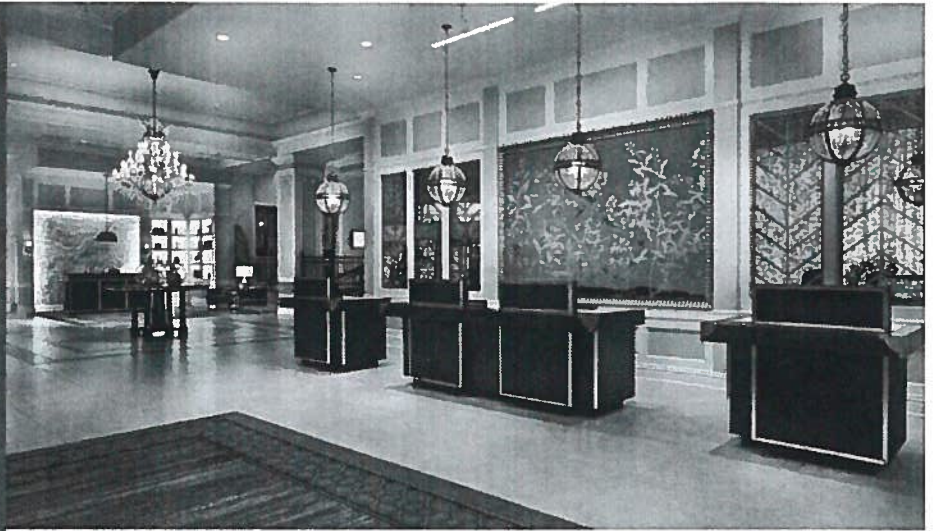
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