Preparing for Year End Close

Year end close is here. To say you’re busy is an understatement. What you need are a few good tips about how to get through this thing the best way possible.

**Tip 1: Use a list**

“Here in the Controller’s Office, we have a list of year end tasks that we review and update before year end,” says Nancy Mears, Director of Operations for the Controller’s Office. You may have received a year-end checklist from the Controller’s Office already. It was sent out in early August. If you didn’t, some of the upcoming key dates are listed in this story.

Additionally, on the Accounting tab of the Finance website there is a list of FAS entry deadlines for the fiscal year.

There’s also a list at the same location of Finance contacts.

**Tip 2: Note key deadlines**

Take careful note of these critical deadlines:

- **September 15:** This is the last day you can key in your ejournals.
- **September 16:** This is final close deadline for the academic and operating units. Since the first close deadline was on August 26, the Emory community as a whole has time to do a little cleanup. However, on September 16, ejournals are due in the Controller’s Office.

“These are critical deadlines,” says Mears.

**Tip 3: Mark your ejournals**

On September 4, old year and new year journals are available. Go through your ejournals and put old or new next to your signature on each journal.

“Indicate with a marker or anything else you prefer if the journal is old or new, just so your mind is clear that the electronic journal entry you are submitting is the right year,” Mears says.

**Tip 4: Make sure your journal entries posted**

“Follow up and make sure your journal entries posted,” states Elaine Cassard, Associate Controller. “Carefully track your entries through the system. If an entry doesn’t post within a week, contact the Controller’s Office right away.”

There are many different ways to check your posted activity, but one of the easiest is to sign on the eJournal page on the Finance website’s Accounting tab.

**Tip 5: Be flexible**

On a personal note, both Mears and Cassard agree that it’s important to expect the unexpected.

“Be ready for unexpected circumstances,” cautions Cassard. “Be flexible. Sometimes it seems like if something goes wrong, it happens at 5 o’clock.”
Payroll Department Receives Best Processes Award from American Payroll Association

Emory’s Payroll Department is ranked number one in the country for one of its “best practice” payroll processes.

The Payroll Department received the Prism Award for Best Processes from the American Payroll Association (APA) August 13 in Washington, D.C. It is the first time Emory has received the award.

The American Payroll Association awards four Prisms each year, one each for process, management, technology, and an overall award. Emory competed nationally against businesses, universities, and other non-profit organizations.

Joleen Mitchell, University Payroll Director, Beth Cox, Payroll Supervisor, and Stacy Taylor, Payroll Coordinator, accepted the award at the APA Best Practices Conference.

The Payroll Department used to certify more than 400 timekeepers from all of Emory’s 397 departments. Beginning in October 2007 the Payroll Department held 11 classes on the university’s automated time and attendance program, Kronos, and tested all timekeepers.

The Payroll Department also developed a 12-page brochure on payroll policies and procedures, which is given to all new employees at orientation and is available online.

Payroll Department with Prism Award, L-R: Evon Wilson, Beth Cox, Rhonda Foster, Joleen Mitchell, Stacy Taylor (front), Amber Sims, Karla Dawson
Show Your Emory Guests Some Southern Hospitality

If you have an Emory guest coming to town, there are a few simple things you can do to show them some real Southern hospitality.

An “Emory guest”, per section 505.01.01 of Emory’s Travel policy is defined as an “official guest of the University, whereby their travel costs are being paid for by Emory funds.” Also per the policy, our guests must adhere to the same guidelines for travel as employees must follow.

Generally, guests may be reimbursed for actual, necessary expenses up to what is allowed by policy. It is important that the host department inform the guest, in advance, what will be reimbursed by Emory funds.

Per Wikipedia, “Southern hospitality” is defined as “a way to make the visitor feel as comfortable as possible in an unfamiliar setting.”

So, how do we combine all that formal policy-speak with the warm and fuzzy definition of Southern hospitality?

We can begin by taking care of their air travel arrangements for them, saving them from spending their own funds and having to wait for reimbursement.

All three of our preferred travel agencies allow you, the employee, to book guests of Emory and direct bill it to your appropriate FAS account. With the increasing cost of airline tickets, this is certainly of value to the guest.

Be careful with international guests, however. Federal Travel Regulations require that only U.S. carriers be used for travel that is to be paid from federal grants and contracts. This is referred to as the Fly America Act. Our three travel agencies can help guide you on these types of arrangements as needed.

Do your guests need hotels? Another way to show some hospitality is to help arrange their hotels. If you select the Emory Conference Center Hotel, their room night expenses can be direct billed to your FAS account, saving the guests from using personal funds. If they stay elsewhere, we have negotiated special pricing for our guests with many of our nearby hotels, ranging from Marriott Courtyards to the Ritz Carltons.

Little gestures such as these can make the guest feel more welcomed here at Emory and get the visit off to a great start.

Links to all the travel information, such as Emory’s three preferred travel agencies, local hotel discounted pricing, the Fly America Act, as well as the current Travel Policy, can be found by going to www.finance.emory.edu and clicking the TRAVEL tab.
Teamwork and Dedication Combine at Emory

School of Medicine and Finance Come Together To Solve a Pressing Problem

By Rex Hardaway

Recently the Emory School of Medicine and Emory Financial Operations came together to solve a pressing problem, and in the process demonstrated what can be accomplished when teamwork and dedication combine.

A typical day in the life Darryl Barr, Associate Director for Research Programs and Resources, within the Emory School of Medicine requires not only professional knowledge, but also a willingness to seek a better way. And some days require a little more than others.

Darryl’s most recent challenge: Find a solution to replace a centralized legacy sample collection system previously managed by a laboratory director who had left the university. The program involved dozens of researchers, laboratories, and programs, each of which relied daily on a core lab to collect, ship, and re-bill the cost of processing DNA sequencing samples sent to a firm located in another city. To make matters more difficult, several personnel working within the legacy process would be leaving Emory in about 30 days.

Motivated to find a solution and burdened with the pending deadline, Darryl contacted Loette King, Senior Director of Procurement and Payment Services for assistance.

Loette immediately rounded up resources within the Financial Operations team. As the new point person for developing a workable process, Loette called a meeting to uncover the details and work out the solutions that would be required to address Darryl’s problem. An optimal solution would include: negotiation of a contract/agreement with the current supplier; the design, development, and testing of a new web ordering system; communication of the changes to hundreds of researchers; training of end users on the new process; reduction of the total cost of this type of service; and, oh yes, have the complete system up and running in less than 25 days.

Bart Kirkham, Supplier Analyst with Emory Procurement Services, was given the task of working with Agencourt Bioscience Corporation’s IT group to design, develop, and test the completely new web ordering system.

The integration of the Agencourt system within Emory Express was crucial to the success of the change. While the process was being worked through, Rex Hardaway in Contract Administration began the task of negotiating a new agreement with Agencourt. The new contract would need to reduce costs and transfer the logistical processes to the supplier.

Meanwhile, back at the SOM, Darryl was communicating with and securing the services of the supplier to train hundreds of researchers (in the middle of the summer) so that on July 15, 2008 the new system would be ready for use by all those who had previously relied on the core lab.

On July 15, exactly on time, at prices significantly less than before; the new Agencourt system went live within Emory Express, a technological first for any automated procurement system and a best-in-class process for managing DNA sequencing sample handling in a decentralized manner, and a testament to what can happen when we all work together toward a common goal. Each group doing its part to make the project a success is what made this process work, and it’s a great example of what makes Emory a great place to work.
The OGCA Billing and Collection Group

The Office of Grants and Contracts Accounting (OGCA) Billing and Collection group was formed earlier this year from other sections of OGCA to invoice and collect awards that are not billed and paid electronically.

OGCA is responsible for post-award accounting and financial compliance of the nearly $400 million awarded through sponsored programs at Emory. While the bulk of sponsored programs are funded through the Federal government, which usually requires electronic billing and payment, a substantial number of awards must be billed and collected manually. That is the province of the new Billing and Collection group.

Sandra Brown-Igbinovia, who has been with OGCA the longest of anyone in the group, is a Billing Accountant.

Nadia Sosiah is the team’s Cash Applications Specialist. She makes sure all electronic payments and checks are posted to the correct account.

Coral-Gean Abel, the team’s Collections Accountant, is a transfer into OGCA from Psychiatry. She pursues delinquent payments.

Ryan Hairston, who was recently promoted, is the team’s second Billing Accountant.

Jim Fulton, also recently promoted, is Supervisor of the group.

Procurement Services Forms Scientific Advisory Council To Improve Buying Process

Emory’s Procurement Services has formed a Scientific Procurement Advisory Council to improve the scientific buying process at the university and to improve communication between the scientific community and Finance.

Based on nominations from the various departments, 26 council members were selected for their knowledge and direct involvement in Emory research.

At the first council meeting on May 21, 2008, David Thurston, Associate VP for Financial Operations, recommended that the council members focus on being a conduit for the Emory scientific community, providing Procurement insight into Emory’s researchers’ requirements, and help Procurement identify products and services essential to Emory’s research.

Thurston also discussed current scientific campus-wide cost savings and initiatives at Emory. Council members offered feedback on Emory’s current contract suppliers and helped identify potential gaps that may be needed to fulfill Emory researchers’ needs.

The council will meet with Procurement staff four to six times throughout the year.
## Office of the Controller Contact List

For your convenience during year end close, here’s a contact list for the Controller’s Office.

Email your question to the Controller’s Office at Ctrl@emory.edu. This is normally the fastest method and can resolve most issues. Your request will be routed to the right person, and you will get the answers you need!

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In September 2009

Top 10 Reasons Emory Is Going To the PeopleSoft Financials System

You’ve heard about Emory’s new PeopleSoft Financials System that will be in place in September 2009, but you might have questions about why we’re going to a new system.

Here are the top 10 reasons.

Emory is implementing a new financials system to provide

1. Alignment with Emory’s Strategic Plan for collaboration and building bridges.
2. Improved functionality for a 21st Century top research institution.
3. Availability of support services and maintenance.
4. A clear, unified reporting strategy.
5. World-class infrastructure to support Emory’s administrative, financial, academic, student life, research, and other functions.
6. Common transactional processing across the Emory Enterprise for increased efficiencies.
7. Cost-effectiveness and improved use of resources.
8. Added value and improvements in the way we work: Currently there is too much time spent by employees gathering information from multiple sources in varying formats to produce reports -- which can mean more time spent at work.
9. Uncomplicated and agile reports: One easy-to-read format for managers, executives, business officers, and others.
10. Flexibility to support our present and future information needs.

To learn more, go to:
http://www.compass.emory.edu/news/newsletters/Compass%20Directions%20Newsletter_072408.pdf