



Finance Information Forum

Spring 2025

Our Mission

We efficiently deliver high quality services and information to enable the dynamic aspirations of Dartmouth's faculty, students, and staff.



Agenda

Announcements

- Integrity & Compliance
- Vendor Pricing Adjustments
- Purchase Order Clean-up

Coming Soon

- Student Digital Payments Updates
- Concur Travel Portal Upgrade
- Procure-to-Pay Portal

Academic Year-End

- Hiring Graduating Students
- Student Prizes & Awards Season
- Memorial Day Accelerated Payroll

Fiscal Year-End

- Reminders
- Processing Deadlines

Finance Resources & Training



Integrity & Compliance



Vendor Price Adjustment Notifications

If you receive any notification from Vendor/ Supplier related to price increases due to tariffs:

- Do not agree without first checking agreement terms.
- Your agreement may include pricing protection.

Questions about Agreement Terms?

- Reach out to the Contract Manager (see Agiloft contract record)
- Or Email Procurement Services: Procurement.Services@dartmouth.edu



A&S Transition: Purchase Orders (POs)

The transition of A&S and anticipated entity change for Central, will require the chart string information of open POs to be adjusted manually.



A&S Transition And Planning

- **Central Entity.** Currently, entity 20 used for Central and A&S, which will change in FY27
- **Timing.** A&S Go Live 7/1/2026
- **System Testing.** Many system changes and updates related to entity change



Manual Transition Effort : POs

- **Manual Changes.** Changes to POs are anticipated to be the most time-consuming manual effort.
- **Open POs.** As of December 2024, *there were more than 5,000 open POs from 2007-2025 (CIPs and Grants not included).* Since December, an internal team has closed >2,500 and counting.

As we look towards FY26, we ask that folks use POs only when needed, to minimize manual efforts to transition impacted POs.



A&S Transition: Purchase Order (PO) vs. Contract

The internal process of a Purchase Order (includes setup, receipt, post-receipt verification, and close-out) is more complex than a contract.

Purchase Order Use General Guidance:

**Purchase Capital Equipment where
value is \$5k or greater**

**Vendor requires a PO
(vendor will not use a contract)**

vs.

Contract Use General Guidance:

**Purchase goods or services in an
identified area of risk (construction,
travel, transportation, data, IP, etc.)**

**Purchase of goods and services
where vendor provides Dartmouth
with their Terms and Conditions
contract language**

If you have questions on PO vs. contract use and/or A&S Transition related PO transition efforts, please reach out to Whitney Henry, Tammy Moffatt, or Laurie Noblet.



Coming soon!

Updates & Upgrades




Student Digital Payments Update – coming soon

Method of accepting payments:

- US Bank Account
- Zelle
- PayPal – *New*
- Venmo – *New*

Refer to [Student Digital Payments](#) for additional guidance





[Dashboard](#) [Payment Activity](#) [My Wallet](#)

Accept Payment

✓

2

3

4

Details




Method

Summary





Confirmation

Select a Method of Payment

Your Wallet

	US Bank Account Ending In 1748	Last Used: March 10, 2022	▼
	Zelle Account d*****@dartmouth.edu	Last Used: March 10, 2022	▼
	PayPal Account (603)***-***67		▼

Add a New Account to your Wallet

	Add US Bank Account	Learn More	▼
	New Zelle Account	Learn More	▼
	New PayPal Account	Learn More	▼
	New Venmo Account	Learn More	▼

Powered by

J.P.Morgan

CANCEL

CONTINUE

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New Concur Travel Portal

User-Centric Design

- Simple and straightforward navigation to be comparable to well-known consumer websites

Extensive Information

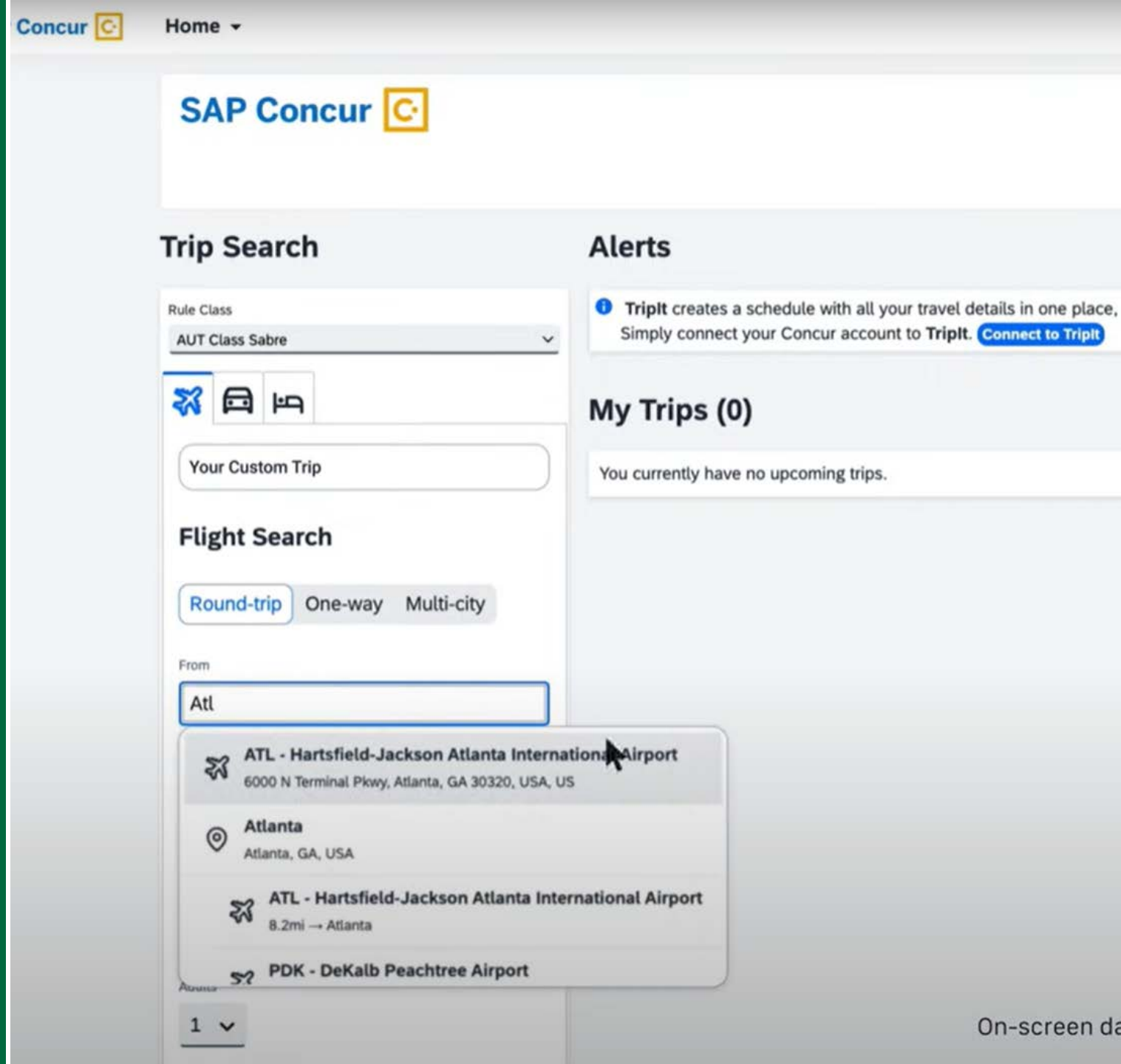
- Diverse selection of travel alternatives and in-depth descriptions and visuals

Eco-Friendly Options


- Access sustainability ratings and pricing details for eco-conscious choices

Prepared for the Future


- Ongoing enhancements with new features on the horizon to improve travel experiences





Procure-to-Pay Vendor Portal


 **PROCURE-TO-PAY VENDOR PORTAL**

Look for a Vendor by

CATEGORY


VENDORS WITH AGREEMENTS


VENDOR NAME


DIVERSITY STATUS


APPROVED FOOD PROVIDERS AND CATERERS


Find existing vendors by:

- Name
- Expense category
- Institutional Agreements
- Business Classification
- Approved Food Providers



Employee Time Management Supervisor Trainings

Dartmouth Finance

Supervisor Training

For Managing Hourly-Paid Employees

Dartmouth Finance

Kronos System Training

For Supervisors and Managers



Setting Expectations for Time Reporting

Accurate Time Reporting

- Hourly employees must accurately record their time worked
- Must be paid at least minimum wage and overtime according to FLSA and state law
- Hours should never be prepopulated or unrecorded
- Employees must be paid for all hours worked

Overtime

- Paid at one and one-half times the regular rate for hours worked beyond forty within the work week
- Employees should not work overtime without supervisor's approval
- Refer to the Overtime Policy for more details

Meal Breaks

- Allocate at least 30 minutes after 5 hours of work
- If less than 20 minutes the meal period is paid (short break)

Paid Time Off

- Set expectations for requesting vacation, personal time, and floating holiday Resources



Academic Year-End & Student Payments

Graduating Seniors Reminders
& Process Deadlines



Graduating Seniors Addresses

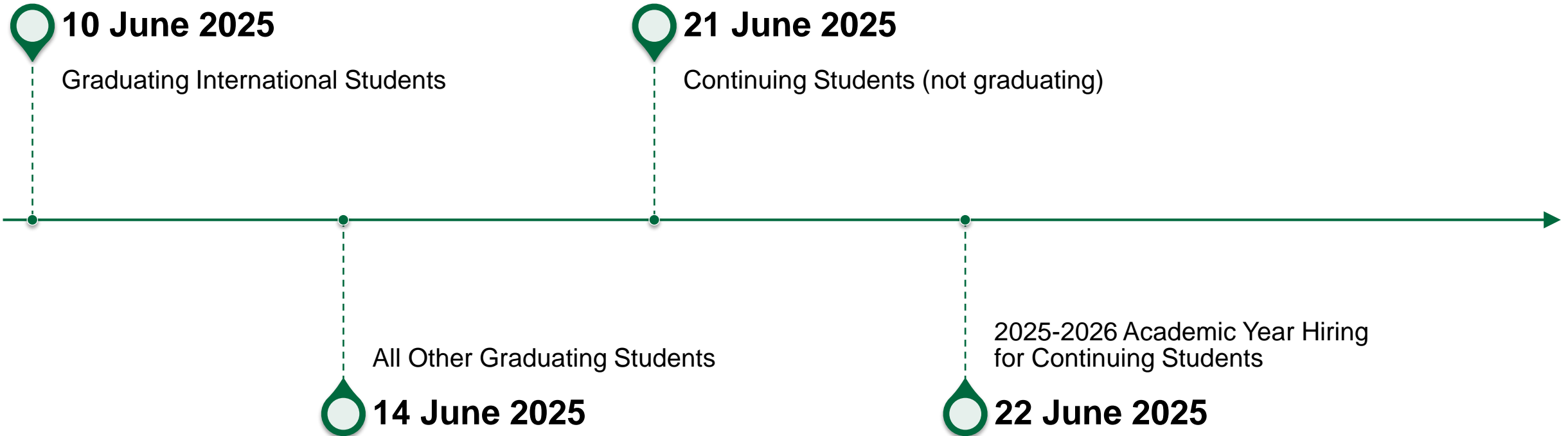
Remind Seniors to update their
Legal Home Mailing Address in DartHub

- *Required for tax reporting*
- *Needed for other correspondence by many student facing offices*



Spring Term Student Employment End Dates

The last possible end dates for student employment for 2024-2025 Academic Year are as follows:



Hiring Graduating Students

Graduates cannot remain in student employment after graduation. Hiring Dartmouth graduates must adhere to the established staff hiring procedures.

For departments seeking to hire graduates for:	3 months or less	3-8 months	9 months or more
Collaborate with your HR Liaison for:	Temporary Employee (<i>Graduate Student Transition-GST*</i>)	Temporary Employee	Standard hire (non-Temp)
Lead-time required:	3 weeks	4 weeks	4-6 weeks

*Limitations Apply



Student Prizes & Awards – Preparation

Recognition & Stewardship Details

- Contact rshelp@dartmouth.edu for listing and recognition inquiries
- Office of Communications will receive the final list of awards

Contact rshelp@dartmouth.edu by May 2, 2025

- Unable to meet June 13 deadline
- If you do not plan to distribute awards
- Have a new prizes or awards not listed in the Payment Request eForm
- Have changes to existing awards

Prize Information

Name of Prize (Select from list OR enter full name if new)*

Prize

SAMUEL E. ARONOWITZ 1911 **PRIZE** FOR SOCIAL CHANGE

CAMERON-GLICKENHAUS FAMILY FUND **PRIZE** FOR MOST PROMISING MINOR IN EDUCATION

ZORA NEAL HURSTON **PRIZE** FOR EXCELLENCE IN THE SOCIAL SCIENCES

PRAY MODERN LANGUAGE **PRIZE** IN GERMAN

STEPHAN J. SCHLOSSMACHER MEMORIAL **PRIZE**

GERMAN CONSULATE **PRIZE**

WERNER HOFFMEISTER **PRIZE** FOR BEST HONORS THESIS ON GERMAN LITERATURE AND CULTURE

SUSAN DEBEVOISE WRIGHT MMUF **PRIZE** GENDER STUDIES

EXCELLENCE IN WOMEN'S, GENDER AND SEXUALITY STUDIES **PRIZE**

WING-TSIT CHAN **PRIZE**

WILLY GORRISSEN **PRIZE** IN ASIAN STUDIES FOR OUTSTANDING SERVICE TO DAMELL AND AMES

SALVADOR ALLENDE MEMORIAL **PRIZE**

CLASS OF 1859 HISTORY **PRIZE**

EDWIN F. JONES 1880 HISTORY **PRIZE**

RICHARD B. MCCORNACK **PRIZE** FOR EXCELLENCE IN HISTORY

LOUIS MORTON MEMORIAL **PRIZE** IN HISTORY

CHARLES T. WOOD MEMORIAL **PRIZE**

HISTORY LONDON RESEARCH **PRIZE**



Student Prizes & Awards - Payments

- **Digital Payments are recommended.** Student will receive notification from J.P. Morgan to accept payment.
- **Keep your prize a surprise!** Use the Invoice Date to indicate what date you would like payment issued!
- **If you must have check pick up,** submit by Monday, June 9th and must be picked up on Wednesday, June 11th.
- **Verify city and state.** If possible, verify the city and state within the Address section and if incorrect, have student update their address in DartHub.
- **Verify residency for non-resident students.** Non-resident students must register in Sprintax to ensure accurate payment process and tax withholdings.



PAYMENT REQUEST Request 1482523

Date Submitted 04/17/2025	Submitter Wallace, Lisa A	Department Finance and Admin	Finance Center AdminProv Fin Ctr
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Invoice Date*

Legal Payee Name*

Business Purpose (will display on check)*

GL/OGA Description (if different from Business Purpose)

Payee Site Code

Payee Type

Supplier Number

Pay To

Payment Method

Payee NetID

Payment Type
Student Prizes and Awards

Payment Amount

Anticipated Pay Date
Populates when processed in AP

Address

New Payee/Address

This form must be Submitted and Approved by 4PM on the Wednesday before graduation for information to be provided to the Office of Communications.

Prize Information

Name of Prize (Select from list OR enter full name if new)*

Begin typing to see matching Prizes

Type of Award*

MONETARY & NON-MONETARY

Non-Monetary Award Information

Non-Monetary Award Description*

Is the non-monetary award taxable?*

A non-monetary award is taxable if the student takes possession

Non-Monetary Award Estimated Value*

Chart Strings

Chart Type*

Chart String*

GL String

GL String*

Nat. Class

Amount*

Add Additional String

Total:

Amount

Department Administrator Access

Department Administrator Additional Access

Check box if chart strings above are outside your Department or if this request does not use any chart strings

Special Handling

Reason

Resipient Residency

Is the payee a resident or non-resident of the US for tax purposes?*

Resident

Upcoming Student Payroll Deadlines and Reminders

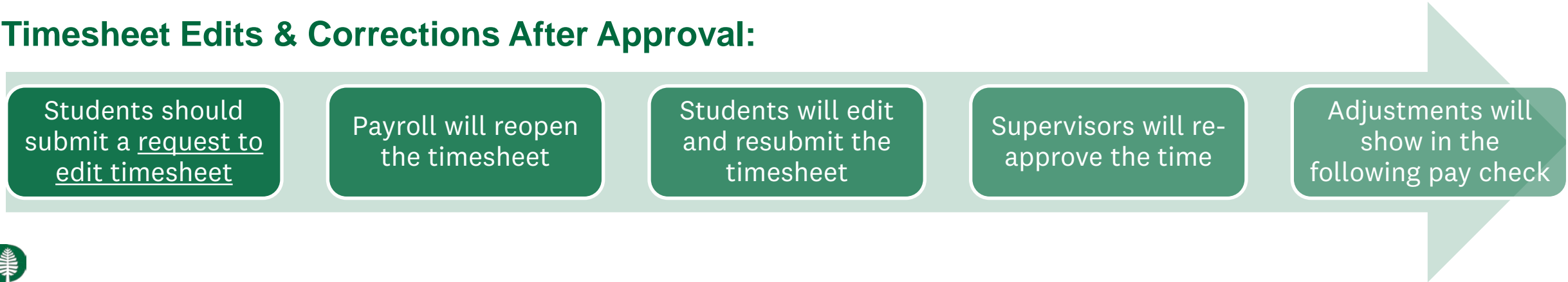
Accelerated Student Payroll for the Memorial Holiday – Monday, May 26th

Process/Task	Responsibility	Deadline
Record and submit all hours for 5/11 – 5/24	Student Employees	Sat, May 24th, 11:59PM
Timesheet Corrections and Approval Complete	Student Employee Supervisors	Tue, May 27th, 11:00AM
Timesheet Approval Complete	Finance Center	Tue, May 27th, 2:00PM

Remind student employees to:

- Record hours at the beginning and ending of each shift
- Submit their timesheets after their last shift of the second pay period week.

Timesheet Edits & Corrections After Approval:



Upcoming & Fiscal Year-End

Reminders
& Process Deadlines



Accelerated Biweekly Payroll for the July 4th Holiday

Process/Task	Submission	Deadline
Record all hours for 6/15 – 6/28	All Biweekly Non-Union Employees	Thu, June 26, 4:00PM
Time Detail Report Run	Finance Center	Fri, June 27, 7:00AM
Corrections and Approval Complete	Biweekly Non-Union Supervisors	Fri, June 27, 11:00AM
Finance Center Approval Complete	Finance Center (Non-Union)	Fri, June 27, 4:00PM
Weekly Union Approval Complete	Union Payroll Supervisors	Sun, June 29, 9:00AM
Finance Center Approval Complete	Finance Center	Mon, June 30, 9:00AM

 **FY2025 LAST DAY BIWEEKLY PTO IS SATURDAY, JUNE 28TH**

Labor Account Distribution Changes and Payroll Authorizations		
FY2025 Labor Reports Review for FUTURE Labor Distribution Corrections	MYLS eForm for Future Payroll	Fri, June 13
FY2025 Labor Reports Review for PRIOR Labor Distribution Corrections	Wage Transfer eForm for Prior Payroll	Fri, June 20
FY2026 Labor Distribution Changes	MYLS eForm for Future Payroll	Now (No need to wait)
FY2025 Biweekly PA Requests (<i>new hire, terminations, transfers, etc.</i>)	General Request eForm/PASF	Fri, June 20
FY2025 Exempt PA Requests (<i>new hire, terminations, transfers, etc.</i>)	General Request eForm/PASF	Fri, June 13



Finance Center 2025 Year-End Transactional Processing Schedule (1/2)

Process/Task	Submission	Deadline
Check Deposits		
Check Deposits by 12:00PM <i>(Cash is not accepted)</i>	Cashier's Office	Fri, June 27
Journal Entries, Corrections, and Transfers (including AP Corrections)		
Financial Report Review for Corrections of transactions prior to 5/31	Corrections and Journal eForm	NOW
Financial Report Review for Corrections of transactions prior to 6/30	Corrections and Journal eForm	Wed, July 2
Payables		
Clearly mark all Payment Requests either FY25 or FY26 to ensure they are applied to the correct fiscal year		
All Invoice & Other Payment Requests by 12:00PM	Payment Request eForm	Fri, June 27
All Invoice & Other Payment Requests with a new vendor and/or new contract for FY25	Payment Request eForm	Fri, June 13
Student Prizes and Awards by 12:00PM	Payment Request eForm	Fri, June 27



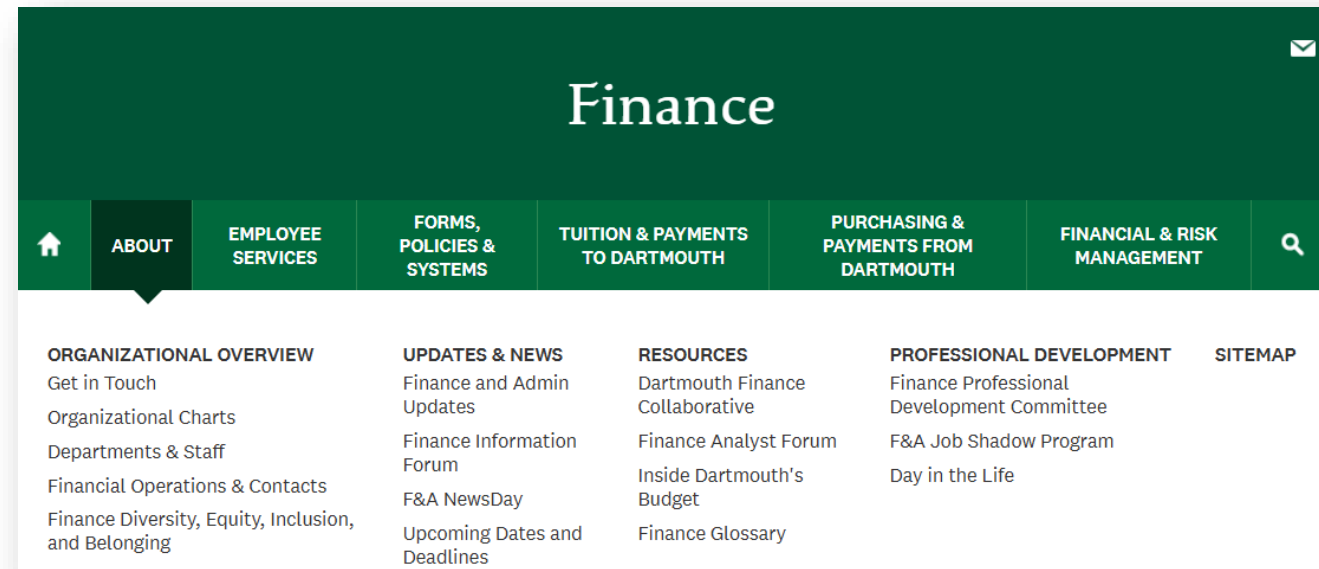
Finance Center 2025 Year-End Transactional Processing Schedule (2/2)

Process/Task	Submission	Deadline
PCard		
FY2025 Purchases Completed	PCard	Fri, June 13
All FY2025 PCard Receipts	PCard eForm	Mon, June 30
Purchase Order/Requisitions		
Purchase Requisition/PO Requests	Purchase Request eForm	Thu, June 26
<i>Note: Goods or Services must be delivered by June 30th to be applied to FY2025</i>		Mon, June 30
Reimbursements/iExpense Reports and Corporate Card		
All Travel/Business Expense Requests with Payable Advances	Payment Request eForm or Expense Report Request eForm	Wed, June 18
Dartmouth Students/Visitors Reimbursements	Payment Request eForm	Fri, June 27
Dartmouth Employee - Self Service*	iExpense Expense Reports	Fri, June 27
<i>*Note: Approval of iExpense Expense Reports must be received by</i>		Tue, July 1
Dartmouth Employees - Finance Center creation of Expense Report for expense before 7/1/2025	Expense Report Request eForm	Fri, June 27



Resources & Training

- Join us to connect and learn!
 - [Dartmouth Finance Collaborative](#)
 - 1st Wednesday 10 months/year
 - [Finance Analyst Forum](#)
 - 3 times per year
 - [Oracle Self-Service Analytics](#)
 - Quarterly
- [Finance & Admin Update](#) →
- [Upcoming Dates & Deadlines](#) →
- [Finance Glossary](#)
- [Financial Operations & Contacts](#)
- [Get in Touch](#)



- Continued Live Training
 - Agiloft Contract Management Training
 - Thursday, May 8, 3:00 - 4:45PM
 - Thursday, June 12, 1:00 – 2:45PM
 - OnBase Unity Client: Getting Started
 - Wednesday, May 14, 9:00–10:00AM
 - Agiloft IRA Reports Training
 - Wednesday, June 11, 9:00 – 9:45AM



As always,
your feedback and input
is critical to our joint success!

Thank You!

