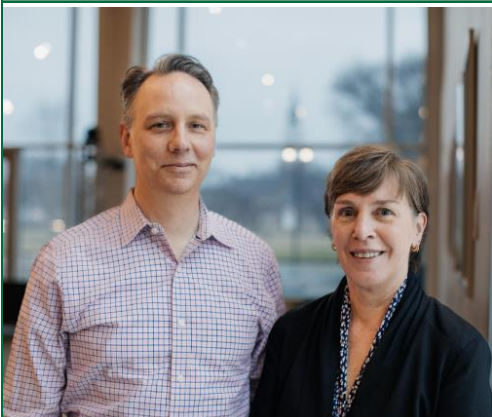


Finance & Admin Update

Announcements and updates from Finance, Campus Services, Human Resources, Risk & Internal Controls, and Safety & Security



Dartmouth Names next Chief Financial Officer and Vice President for Finance

Dartmouth has formally named our next senior financial officers. Scott Frew has been named Chief Financial Officer and Dianne Ingalls '84, Tuck '88 has been named Vice President for Finance. Scott and Dianne have been leading Dartmouth as co-Interim Vice Presidents for Finance since last September. Together, they provide balance at the highest level. We are thrilled with the results of the search and look forward to the sound expertise their leadership will continue to provide.

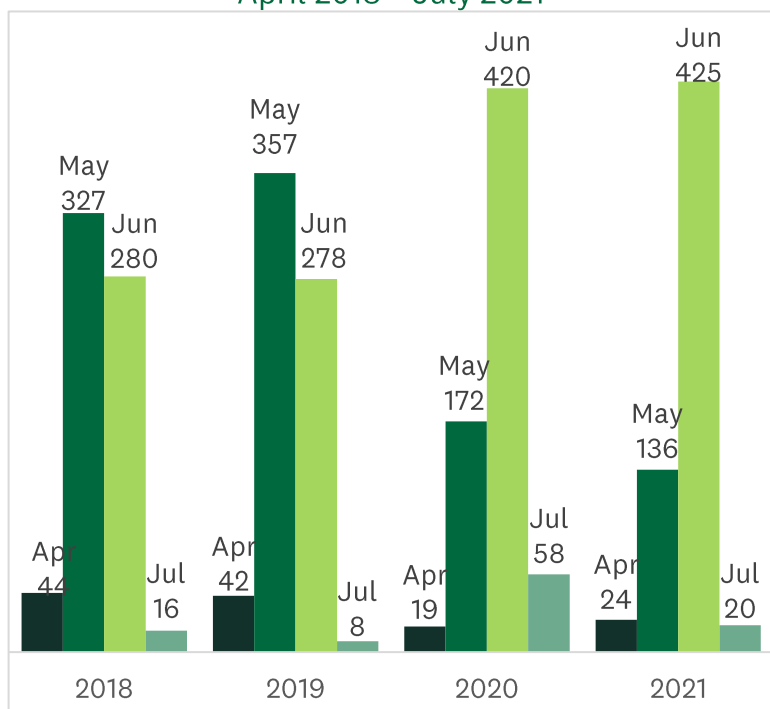
Congratulations Scott and Dianne!

Photo by Robert Gill

Chart of the Month

Student Prize & Award Season is Here!

April 2018 – July 2021



Source: Finance Center Metrics 2018 - 2021

Over the past two years there has been a significant shift of more [Student Prizes & Awards eForms](#) being submitted in June versus in May. This can pose difficulty for the Recognition and Stewardship Department and the Office of Communications who are responsible for ensuring that all prizes and awards are listed with the recipients in the Commencement listing.



This year's deadline for submitting 2022 Commencement Student Prizes & Awards is June 10. If you are not going to be able to make this deadline, please reach out to rshelp@dartmouth.edu. More information on page 2.

Upcoming Dates and Deadlines

Spring Finance Information Forum

Friday, 4/22, 11:00AM

The [Finance Information Forums](#) are designed to provide updates regarding projects, processes, policies, and upcoming dates, deadlines, and reminders. [Click here to register.](#)

2022 Finance Center Year-End Processing Schedule

Now available on page 3 of this update!

Welcome new F&A Team Members!

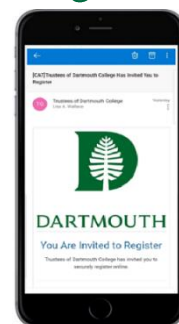
Madeeha Ilyas, Financial Analyst, Financial Reporting

Mark Shanahan, Patrol Officer, Safety & Security

Shane Walton, Patrol Officer, Safety & Security

Student Digital Payments with J.P. Morgan

Dartmouth has partnered with J.P. Morgan Chase to provide a digital payment method for Accounts Payable (AP) payments to students. Over the past several weeks we have been running a pilot with select student payments. Thus far, the student digital payment process has been seamless, and we will be looking to roll out student digital payments for all student AP payments over the next several weeks.



Payment Request and Student Prize & Award eForms will be completed as they are currently, and students will receive a notice from J.P. Morgan to accept their payment electronically in place of the current paper check printed and mailed from Dartmouth.

In preparation to digital payment for students, Finance is providing a [“How to Pay Students”](#) site, with a complete [FAQ for Student Digital Payments](#), as well as, and updated [Student Payments Guidelines](#) site.

Student Prizes and Awards Season is Here!

The 2022 Commencement Student Prizes and Awards season is here, and all recipient names are **due by June 10th**.

Name of Prize

To ensure students are recognized with the proper prize or award in the Commencement materials, select the correct name from the drop-down menu on the [Student Prizes & Awards eForm](#).

All communications regarding the names of awards and how they will be listed in the Commencement materials will be coordinated through rshelp@dartmouth.edu. *Please do not reach out directly to Office of Communications.*

Please email rshelp@dartmouth.edu as soon as possible, but **no later than 4/25/2022**, if any of the following apply:

- You will not be able to submit the [Student Prizes & Awards eForm](#) before the June 10th deadline.
- You do not expect to give out awards this year.
- Your department is awarding a new prize/award that is not listed in the drop-down menu in the [Student Prizes & Awards eForm](#).
- You are making changes to existing awards. A form will be sent to you through email with instructions.

Safety & Security's Recognition Program

The Department of Safety and Security regularly provides a high level of service and response for the Dartmouth community, and it is important that we recognize those that provide exceptional service. As a way of highlighting extraordinary performance and service of department members, the Department of Safety and Security maintains a nomination based "Recognition of Good Performance" program. This program is designed to recognize Safety and Security team members for selfless, positive performance, achievements, conduct, actions, and activities that present a particularly unusual contribution to the Department, Dartmouth, or the overall community, or that go above and beyond the call of duty.

Nominations may come from any Dartmouth community member including students, staff, faculty, or alumni. If you would like to submit a nomination, email [Keiselim Montás](mailto:Keiselim.Montás), Director. Please contact [Safety and Security](#) with questions about the nomination and selection process.

Live Finance & Admin Training via Zoom Agiloft Contract Management Training

Click on the date to register:

- [Tuesday, May 10 from 1:00 - 2:30pm](#)

Note: use your netid@dartmouth.edu in the email field.

Employee Time Management Supervisor Training

Click on one of the below dates to register:

- [Wednesday, May 11 from 1:00 - 1:45pm](#)
- [Monday, May 16 from 2:00 - 2:45pm](#)

Records Management has a New General Retention Schedule Tool!

The Archives and Records Management team has at long last launched the [General Retention Schedule \(GRS\)](#). The GRS is designed to make it easier for Dartmouth faculty and staff to make thoughtful and legally defensible decisions about keeping and disposing of records. It provides guidance on how long different types of commonly used records must be retained and if records should be either destroyed or transferred to the Archives once the retention periods have ended. It applies to records in all formats, including paper and electronic.

Digital Spring Cleaning: R.O.T. edition

ROT is the acronym for information that is Redundant, Obsolete, and Transitory. It accumulates over time consuming storage space and confounding employees. It's easy for an office to fall into the trap of retaining ROT, but it can represent a serious risk to Dartmouth. Tackle ROT by scheduling time to purge those types of records whether it be weekly, monthly, or quarterly. Consider the following recommendations to help you get started:

Pick low-hanging fruit

- Start by deleting items that you can quickly identify, such as drafts, duplicates, notifications, newsletters, and announcements.

Create a plan of attack

- Where are you targeting ROT? Consider all the formats and locations your office uses to store records: email, shared drives, databases, file cabinets, the cloud, or personal devices. Where did former employees keep records?
- Consider your office's workflows. Who uses and manages these records? When you delete records in one location, is there another location with duplicate records to check as well?
- Who needs to be involved? Will you be delegating cleanup on sections of your shared drive? Who has the final authority to approve deletion?
- What is your cleanup timeline? Is this a one-time sweep, or a model for ongoing management?

Measure volume to prove success

- Take a starting point measure of your overall volume so you can demonstrate later how much ROT you've removed.
- Measure volume in:
 - Shared network drives: Total MB, Total number of files, Total number of folders.
 - Email: Total number of messages (remember to count Sent and Deleted).

For more helpful training and guidance on maintaining Dartmouth records, go to the [Records Management](#) website.

2022 Finance Center Fiscal Year-End Transactional Processing Schedule

Process/Task	Submission	Deadline
Cash Receipts		
Cash Deposits by 12:00PM	Cashier's Office	Thu, 6/30/2022
Journal Entries, Corrections, and Transfers (including AP Corrections)		
Financial Report Review for Corrections of transactions prior 5/31	Corrections and Journal eForm	NOW
Financial Report Review for Corrections of transactions prior 6/30	Corrections and Journal eForm	Wed, 7/6/22
Payables		
All Invoice & Other Payment Requests by 12:00pm	Payment Request eForm	Wed, 7/6/22
Note: Clearly mark all Payment Requests either FY22 or FY23 to ensure it is applied to the correct fiscal year		
Student Prizes and Awards by 12:00pm	Student Prize & Awards eForm	Wed, 7/6/22
Payroll		
FY2022 Labor Reports Review for Labor Distribution Corrections	Wage Transfer eForm for Prior Payroll MYLS eForm for Future Payroll	Mon, 6/13/22
FY2023 Labor Distribution Changes	MYLS eForm for Future Payroll	Now (No need to wait)
FY2022 Biweekly PA Requests (new hire, terminations, transfers, etc.)	General Request eForm	Fri, 6/10/22
FY2022 Exempt PA Requests (new hire, terminations, transfers, etc.)	General Request eForm	Fri, 6/17/22
FY2022 Last Day Biweekly PTO	Kronos	Sat, 6/18/22
PCard		
FY2022 Purchases Completed	PCard	Fri, 6/17/22
All FY2022 PCard Receipts	PCard eForm	Wed, 7/6/22
Purchase Order/Requisitions		
Purchase Requests		Wed, 6/29/22
Note: Goods or Services must be delivered by June 30th to be applied to FY2022		Thu, 6/30/22
Reimbursements/iExpense Reports and Corporate Card		
All Travel/Business Expense Payment Requests or Expense Reports with Cash Advances		Wed, 6/22/22
Dartmouth Students/Visitors Reimbursements		Wed, 7/6/22
Dartmouth Employee - Self Service*		Wed, 7/6/22
*Note: iExpense Expense Reports Approvals must be received by		Wed, 7/6/22
Dartmouth Employees - Finance Center creation of Expense Report for expense after 7/1/2022	Expense Report eForm	Wed, 7/13/22
Accelerated Payroll		
Biweekly Payroll, May 30th	Responsible Person	Date
Record all hours for 5/15 - 5/28	All Student	Thu, 5/26/22
Time Detail Reports Run	Finance Center	Fri, 5/27/22 7:00am
Student Hours Reviewed	Student Supervisors	Fri, 5/27/22 11:00am
Finance Center Approval Complete	Finance Center	Fri, 5/27/22 4:00pm
Biweekly Payroll, July 4th	Responsible Person	Date
Record all hours for 6/19 - 7/2	All Biweekly Non-Union	Thu, 6/30/22
Time Detail Reports Run	Finance Center	Fri, 7/1/22 7:00am
Corrections and Approval Complete	Biweekly Non-Union Supervisors	Fri, 7/1/22 11:00am
Finance Center Approval (Non-Union) Complete	Finance Center (Non-Union)	Fri, 7/1/22 4:00pm
Weekly Union Approval Complete	Union Payroll Supervisors	Sun, 7/3/22 9:00am
Finance Center Union Approval Complete	Finance Center	Sun, 7/3/22 4:00pm