

The latest news, updates, and announcements from Finance, Finance Centers, Campus Services, Human Resources, Information, Technology & Consulting, Integrity & Compliance, and Internal Controls Services

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Chart of the Month

Personal Purchases on Dartmouth Credit Cards Returned

Dartmouth Credit Cards—the Corporate Card and Procurement Card (PCard)—must never be used for personal purchases. Recently, Dartmouth Finance has seen an increase in personal charges on these cards. The chart shows the number of payments back to Dartmouth for personal and accidental charges on Dartmouth cards through 3rd quarter of FY2025.

Why This Matters

Even accidental personal charges are considered non-compliant, create unnecessary administrative work, and cost Dartmouth time and money. Each personal transaction requires:

- Manual processing to allocate the expense
- Extra steps to notify, track and reconcile the transaction
- Bank fees to the credit card company

Intentional personal use is considered fraud and can lead to loss of card privileges or termination.

If a Personal Charge Happens

We understand that accidents happen. If you use your Dartmouth card for a personal purchase:

- Repay Dartmouth as quickly as possible
- Go to the [Returning Funds to Dartmouth](#) site:
 - Note the OIE number for Corporate Card charges or the OB number for PCard charges
 - Clearly label the repayment as "personal expense"

Tips to Avoid Personal Charges

Help keep Dartmouth's finances clean by following these simple practices:

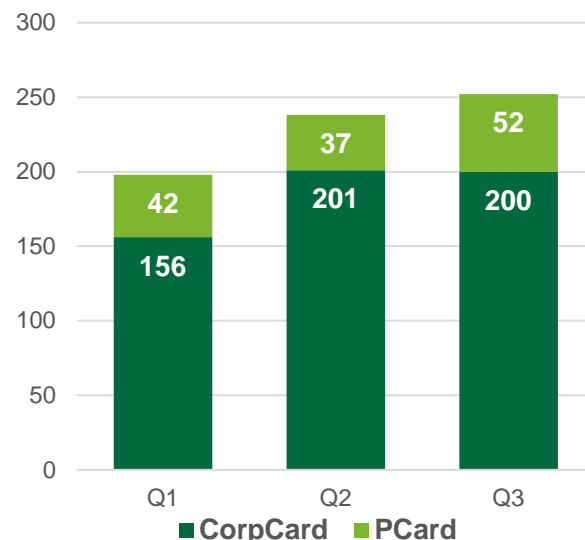
- Keep **business and personal accounts and purchases** completely separate
- **Do not save** your Dartmouth card info in personal online accounts
- **Store your card securely** and only bring it when making business purchases
- Use **Amazon Business** for Dartmouth purchases - One of the most common issues is accidentally saving your Dartmouth card in your personal Amazon account.

Know the Policies

Before making purchases understand the [Business Expense Policy](#), [PCard Policy](#), and [Corporate Card Program](#). For [policy specifics](#) on non-compliant purchases, review the non-allowable section of the PCard Policy. Here are some additional key policy highlights:

- **Pyramiding:** Splitting a purchase into smaller transactions to avoid the per-purchase limit is strictly prohibited
- **Travel and Entertainment:** PCards cannot be used for travel, entertainment, alcohol, or meals in restaurants, with some exceptions like conference registration.
- **Prohibited Goods/Services:** Certain goods and services are prohibited from being charged to a P-Card, including gifts, gift certificates, and clinical studies incentives.

If you have questions or need assistance, please contact your [Finance Center](#).



Source: Central Merchant Account, FY2025, 07/01/2024 - 03/28/2025 Transactions

Spring Finance Information Forum

☀️ Get ready for our [Spring Finance Information Forum](#), happening on **Tuesday, April 22, from 9:00 – 10:00AM**. This is your chance to catch up on the latest updates, project progress, system and process changes, and important deadlines. With the Fiscal and Academic Year-end, and Commencement approaching, we will be sharing crucial dates and deadlines to help you stay prepared.

👉 [Click here to register](#)

Please note that May's Dartmouth Finance Collaborative will be canceled.

Time for Financial Report Review

We have reached the 4th Quarter, and year-end is just around the corner. Now is the perfect time to dive into your accounts, submit any necessary corrections, and tidy up the details. Let us ensure everything is in top shape as we approach the end of the fiscal year!

Act now and make sure your financial reports are accurate and up to date. Your diligence today will pay off tomorrow! Reach out to your Finance Center if you need assistance or have questions.

Year End Paid Time Off Dates

Just a friendly reminder that our year-end is fast approaching! For hourly employees, the current year wraps up on Saturday, June 28, 2025, and the new year kicks off on Sunday, June 29, 2025, marking the start of the first pay period that includes July 1.

Make sure to use any remaining vacation time by **June 28, 2025**, because unused vacation time generally does not carry over to the next year. But do not worry, up to five days of unused personal time will automatically roll over into the new year.

Your new vacation and personal time balances, including any carried-over time, will be reflected on the biweekly paycheck dated Friday, July 18, 2025.

For more information, please refer to the [Year End Paid Time Off \(PTO\) site](#).

Old Kronos Decommissioned

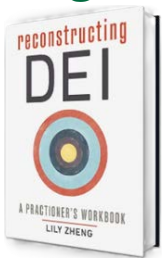
With the update to Kronos to the cloud environment, the On-Prem Kronos has been decommissioned and the associated kronos-hist.dartmouth.edu URL. If you require payroll or accrual details for pay periods prior to the pay period beginning Sunday, October 6, 2024, please email Dartmouth.Payroll@dartmouth.edu.

Discover DEI Insights with Lily Zheng

The Diversity Reading Group is thrilled to sponsor a fantastic afternoon with the incredible Lily Zheng on **Thursday, April 17, 2025, from 3:00 – 5:00PM**. Lily is a renowned DEI strategist, consultant, speaker, and author who helps organizations and leaders turn DEI intentions into impactful outcomes.

This event will feature a captivating lecture, a delightful reception, and a special book signing session. It is the perfect opportunity to gain valuable insights, network, and get your copy of Lily's book signed!

Everyone is welcome to join! Don't miss out – [RSVP Here](#) to secure your spot.



Lone Pine Excellence Award Ceremony

Please celebrate our 2024 [Excellence Award](#) and [Sheila Culbert Award](#) Recipients at the Lone Pine Ceremony & Reception on April 30, 2025. This event is open to the Dartmouth community. [Click here to RSVP](#) to join us.

Be REAL ID Ready ★

Final reminder for travelers. Beginning **May 7, 2025**, every traveler must present a REAL ID compliant driver's license, or another acceptable form of identification, to fly within the United States. For more information go to the [Department of Homeland Security](#) site and review your states' Division of Motor Vehicles site.

New Hampshire Residents: **Vermont Residents:**

- [REAL ID Overview](#)
- [Hours & Locations](#)
- [REAL ID Overview](#)
- [Locations](#)

New Endowment System

We are thrilled to announce that Finance is on target and making fantastic progress on upgrading our endowment application from Fundriver to Balance, Evertrue's cutting-edge endowment system application! Scheduled to launch later this month, this upgrade represents a significant leap forward, offering a fresh look, enhanced features, improved performance, and a more intuitive user experience.

The team is diligently developing a comprehensive training and support model to help you get acquainted with the new Balance application, with training dates set for April and May. We deeply appreciate your continued trust and partnership. We are confident that Balance will bring incredible benefits and look forward to meeting our endowment management needs with this important upgrade.

Stay tuned for more updates and get ready to experience the future of endowment management with Balance.



Student Employee Appreciation Week

Join us in celebrating the incredible contributions of our student employees during [Student Employee Appreciation Week, April 14–18, 2025](#)! This week will be packed with exciting events and opportunities to show gratitude for your student employees' hard work and dedication.

Employer Appreciation Gifts: Consider getting a gift for your student employees, or purchase a Dartmouth-branded water bottle created by our Student Employee Appreciation Week Planning Team! Each 26 oz gray aluminum water bottle has a no-contact tool attached and features a white Lone Pine logo. The cost to departments is \$4.00 each, payable by a chart string funds transfer. All orders must be placed by **Wednesday, April 9**, and will be filled on a first-come, first-serve basis. You will receive email confirmation of your order and details regarding the time frame and location for pick-up. [Order online here!](#) 🖱️



Student Employee Essay Contest: Encourage your student employees to enter the SEO-sponsored short-essay contest for a chance to win a \$150 cash prize. [Entries are due by April 11.](#)

Student Employee Festival: Mark your calendars for **Tuesday, April 15, from 3:00 – 5:00PM** in the Russo Atrium at the Hood Museum of Art. The first 50 student employees will receive a free gift, and all attendees can enter a raffle for amazing prizes. 🌟 **Volunteer at the Festival:** We are seeking volunteers to help make this fun event happen. Please [sign up online](#) as soon as you can.

There are several other ways you can celebrate: Check out this [list of ideas on how to show your appreciation](#) for your student employees, but feel free to come up with ideas that are meaningful to you and your employees.

Whatever you do, be sure to let them know how much you appreciate their contributions to Dartmouth! Visit the [Student Employment's event page](#) for more details!

It is Student Prizes & Awards Season!

It is that exciting time of year again – the season to celebrate, collect, and award prizes for the 2025 commencement ceremony! Here is everything you need to know to ensure your awards are listed and ready to shine!

Recognition & Stewardship Details and Deadline

For all inquiries related to the listing and recognition of awards, please reach out to rshelp@dartmouth.edu. This email address will handle all communications regarding the names of awards and their inclusion in the commencement lists. The Office of Communications will receive the final list of awards, so please do not contact them directly.

If any of the following apply to you, please contact rshelp@dartmouth.edu by **May 2, 2025**:

- You do not plan to distribute awards this year.
- Your department is awarding a new prize or award that is not listed in the Name of Prize drop-down menu of the Payment Request eForm.
- You are making changes to an existing award.

Student Prizes & Awards Payment Requests must be submitted by Friday, June 13, 2025, to have your students' prize and award listed in the commencement brochure!

Help Spread the Word to Graduating Seniors!

- ✓ Graduating students should update their Legal Home mailing address in DartHub. This is required for tax reporting.
- ✓ If receiving a payment to expect an email from J.P. Morgan with the Subject: "You Have Received a Payment from Trustees of Dartmouth College". They will need to log-in or register using their "netid@dartmouth.edu" email address. For more information and guidance go to the [Student Digital Payments](#) site.

Payment Processing for Commencement

We have made the process of managing student prizes and awards easier than ever! To simplify things, all student prizes and award requests are now integrated into the **Payment Request eForm**. This streamlined process, supported by the Finance Center, brings several benefits:

- **Look Up Payee by Name or NetID:** Ensure you have the correct student—no mix-ups here!
- **Student Payment Details Display:** Quickly verify payment location, name, payment method, and NetID.
- **Invoice Date Flexibility:** Select today for immediate payment or choose a future date to prevent accidental early payments, ruining the surprise for your student.
- **Chart String Details:** Ensures you are using the correct chart string for your prize.

If you have questions about student payments or need assistance with the **Payment Request eForm**, reach out to your **Finance Center**.

Setting Expectations for Time Reporting

Supervisors of non-exempt employees have a responsibility to reinforce and establish expectations with their staff on the requirements for hours worked, breaks, overtime, and paid time off. Non-Exempt employee and supervisors must follow the [Time Reporting for Hourly Staff Employee](#) and [Time Reporting for Hourly Student Employee](#) Policies.

- **Accurate Time Reporting:** Hourly employees must accurately record their time worked and be paid at least minimum wage and overtime in accordance with the federal Fair Labor Standards Act (FLSA) and applicable state law. Hours should never be prepopulated prior to work, nor go unrecorded. Employees must be paid for all hours worked.
- **Overtime:** Overtime is paid at one and one-half times the regular rate for hours worked beyond forty within the work week. Employees should never work overtime without the supervisor’s approval. See the [Overtime Policy](#) for more details.
- **Meal Breaks:** Employees must take a 30-minute meal break if they work more than five consecutive hours and must obtain advance authorization to work through their meal break.
- **Paid Time Off:** Employees should report any paid time off. Supervisor should establish expectations for requesting time out of the office for vacation and personal time.

Visit the [Employee Time Management](#) website for additional information, resources, and guidance.

International Staffing and Contractors

Dartmouth's [International Staffing and Contractor Policy](#) is designed to ensure that all international work by employees, independent contractors, and volunteers is managed effectively and complies with host-country regulations. This policy is crucial for maintaining Dartmouth's values and reputation while avoiding potential legal and financial risks.

Why is this policy important?

Complexity of International Work:	Engaging individuals to work outside the U.S. can be challenging due to differences in regulations, compensation, and supervision.
Risk Management:	Properly managing international work helps prevent issues like legal penalties, taxes, and reputational damage.
Support for Teaching and Research:	While Dartmouth limits overseas hires, it recognizes the necessity of some international work to fulfill its mission.

Key Steps to Follow:

Submit the International Staffing Questionnaire (ISQ) :	Before any work is performed, it's essential to complete this form. The ISQ helps ensure that all necessary details are reviewed and documented, setting clear expectations for both the paying department and the worker.
Review by the International Staffing Committee (ISC):	Depending on the nature and duration of the work, the ISC will evaluate each case to ensure compliance and proper management.
Follow ISC Guidance:	Depending on the nature, duration, and location of the work, the ISC will direct you on the proper process to follow.

Why Submit the [ISQ](#)?

Compliance:	Ensures that all international work adheres to Dartmouth's policies and host-country regulations.
Clarity:	Provides a clear understanding of the work to be performed, the responsibilities of the worker, and the expectations of the paying department.
Risk Mitigation:	Helps identify and address potential risks before they become issues.

By following these steps and submitting the [ISQ](#), you contribute to Dartmouth's commitment to responsible and effective international staffing. Let us work together to uphold Dartmouth's values and ensure successful international engagements!

A&S Transition Preparation:

Help Us Streamline Purchase Orders for Efficiency

In preparation for the A&S transition and the anticipated entity change for Central in 2026 (*fiscal year 2027*), we are reviewing processes and systems that will be impacted. A critical area that requires attention is the management and maintenance of Purchase Orders (POs).

During the A&S transition, open POs in affected areas will need chart string adjustments manually. An internal team is reviewing and closing old and unnecessary POs from previous years. We recommend using POs only when absolutely necessary to reduce manual efforts during the A&S transitions.

Purchase Order vs. Contract: *Make the Right Choice*

Understanding when to use a Purchase Order versus a contract can save time and effort. The internal process of a PO—setup, receipt, post-receipt verification, and close-out—is more complex than that of a contract. Here are some guidelines to help you decide:

Use a Purchase Order:	Use a Contract:
<ul style="list-style-type: none">• For purchasing capital equipment valued at \$5,000 or more.• When the vendor specifically requires a PO.	<ul style="list-style-type: none">• For purchases in high-risk areas.• When the vendor provides terms and conditions in their contract language.

By following these guidelines, you can streamline your purchasing processes and reduce manual adjustments. For further questions or assistance, feel free to contact your Finance Center.

By working together, we can ensure a smooth transition and efficient management of Purchase Orders!

Vendor Invoicing:

Key Steps for a Smooth Payment Process

At Dartmouth, we strive to build efficient and trustworthy relationships with our vendors. To streamline invoicing and payments, please direct vendors to the [Vendor Guide](#) and [Submitting Invoices](#) pages. for essential information and resources.

Below are some key reminders payment processes smooth and effective:

Key Invoice Review Tips

Before submitting a Payment Request eForm, ensure the invoice meets the requirements:

- **Billed to Dartmouth:** Must list **Dartmouth College** (or Trustees of Dartmouth College). Your department may also be included.
- **Invoice Number:** Ensure there is a valid invoice number.
- **Remittance Details:** The vendor’s business name and address must match what is listed on the Payment Request eForm. If not, updates must be made in PaymentWorks.
- **Service Dates and Description:** If linked to a contract, ensure the invoice aligns with the contract’s scope and timeframe.
- **Invoice Amount:** Verify the amount matches expectations and contract terms. Small variations in shipping and fees may be reasonable, but significant differences may require a contract amendment, additional funds allocated to a PO, or additional approvals.

Following these tips will help minimize delays and strengthen vendor relationships. For assistance contact the Finance Center.

PP&E Buy-Out Procedures Update

We are pleased to announce an important update to our [Plant, Property, and Equipment \(PPE\)](#) procedures. The buy-out of leased capital equipment—including vehicles, operating equipment, and technical equipment—with a value of \$5,000 or more must be processed through a Purchase Order (PO). This change ensures that all such transactions are accurately accounted for within Dartmouth's Asset tracking system.

Why This Update Matters:

- **Tracking:** Processing buy-outs through a PO allows for precise tracking and management of Dartmouth's assets.
- **Compliance:** Ensures adherence to Dartmouth's financial policies and procedures.
- **Efficiency:** Streamlines the process, reducing manual errors and improving overall efficiency.

What You Need to Do:

- **For Equipment Buy-Outs Over \$5,000:** Always use a Purchase Order to process these transactions.
- **Contact for Assistance:** If you need support, please reach out to your Finance Center.

Visit the [Property, Plant & Equipment](#) site for more information and guidance.

Receiving Electronic Payments

Many vendors prefer to send funds electronically instead of a check, which saves them time, money, and paper. If you are expecting an electronic payment (wire transfer, ACH, or EFT), send an email to [Institutional Accounting](#) with the following information:

- **Name of Sender:** Individual person or company name or sending bank name
- **Expected Amount:** If the exact amount is not known, provide estimated dollar amount
- **Expected Date:** – If this is known
- **A copy of the Invoice or Details**
- **Chart string(s):** – including all six segments for funds to be posted in GL

For more information on Electronic Payments, please refer to the [Receiving Electronic Payments](#) site for guidance.

New Concur Travel Portal

SAP Concur will be launching a new travel portal designed to make your business travel experience smoother and more enjoyable. Here is what is in it for you:

- **User-Friendly Experience:** The portal is intuitive and easy to navigate, similar to popular consumer sites.
- **Comprehensive Content:** Access a wide range of travel options with detailed descriptions and images, making it easier to find exactly what you need.
- **Sustainable Choices:** View sustainability ratings and cost information to make environmentally friendly travel decisions.
- **Future-Ready:** The portal is set to continuously improve, with upcoming features that will further enhance your travel experience.

For more information and to preview some of these changes, check out this [video](#).

LinkedIn Learning Monthly Challenge!

Dartmouth's Learning & Development team is here to help with the [LinkedIn Learning Monthly Challenge](#)! This exciting initiative is designed to motivate and inspire you to explore new learning opportunities and develop valuable skills.

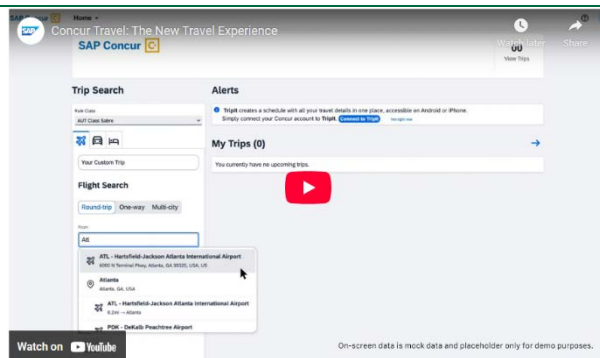
Why Participate?

- **Expand Your Knowledge:** Access thousands of courses on a wide range of topics, from business and technology to creative skills.
- **Personalized Learning:** Tailor your learning experience to your interests and career goals.
- **Showcase Your Achievements:** Completed courses can be displayed on your LinkedIn profile, highlighting your commitment to professional growth.

Getting Started with LinkedIn Learning: Visit the [Dartmouth activation link](#). Use your Dartmouth Single Sign-On (SSO) to log in. Get started with [LinkedIn Learning](#) today and take part in the Monthly Challenge!

Vendor Price Adjustment Notifications

If you receive a notification from a Vendor/Supplier that they are increasing their price of goods/services due to tariffs, please do not agree to those price increases without checking the terms of your agreement. Your agreement may include terms that lock in pricing and prohibit price adjustments. If you have questions about the terms of your agreement or if you receive a price adjustment notification from a vendor, please reach out to your Contract Manager or email Procurement.Services@dartmouth.edu.



Upcoming System Training



Agiloft Contract Management Training

- [Wednesday, April 9, 1:00 – 2:45PM](#)
- [Thursday, May 8, 3:00 – 4:45PM](#)



OnBase Unity Client: Getting Started

- [Wednesday, May 14, 9:00–10:00AM](#)



Agiloft IRA Reports Training

- [Wednesday, April 9, 9:00–10:00AM](#)

Finance Center 2025 Year-End Transactional Processing Schedule

Process/Task	Submission	Deadline
Check Deposits		
Check Deposits by 12:00PM (Cash is not accepted)	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
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 (new hire, terminations, transfers, etc.)	General Request eForm/PASF	Fri, June 20
FY2025 Exempt PA Requests (new hire, terminations, transfers, etc.)	General Request eForm/PASF	Fri, June 13
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	Student Prize & Awards eForm	Fri, June 27
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
Note: Goods or Services must be delivered by June 30th to be applied to FY2025		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
*Note: Approval of iExpense Expense Reports must be received by		Tue, July 1
Dartmouth Employees - Finance Center creation of Expense Report for expense before 7/1/2025	Expense Report Request eForm	Fri, June 27

Protecting Your Online Reputation

"It takes 20 years to build a reputation and five minutes to ruin it."
Warren Buffet

WITH SO MUCH OF OUR LIFE SPENT ON THE INTERNET, THERE ARE CERTAIN VITAL STEPS WE SHOULD ALL TAKE TO PROTECT OUR ONLINE REPUTATION.



USE CAUTION ON SOCIAL MEDIA

- Limit personal info
- Enable privacy settings
- Remove unwanted tags
- Use strong passwords—mix characters and numbers



USE A VPN

A VPN masks your IP address, enabling private and anonymous browsing, even on public connections.



BE CAREFUL WHERE YOU CLICK

- Avoid suspicious links
- Don't click attachments
- Use HTTPS sites



SECURE YOUR MOBILE DEVICES

- Use a strong passcode
- Practice safe browsing
- Download trusted apps



KEEP YOUR SOFTWARE UP-TO-DATE.



INSTALL ANTI-VIRUS SOFTWARE ON ALL YOUR DEVICES



THINK BEFORE POSTING

Assume anything you share online will be permanent; others can screenshot or reshare it.



TREAT OTHERS RESPECTFULLY

Treat others online with the same respect you expect in person.



SEARCH YOUR NAME AND IMAGE REGULARLY

Google your name to manage your online footprint and make any necessary efforts to remove any content that might harm your reputation.



MORE INFO HERE



<https://dartgo.org/infosecprotectonline>