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Research Administration Information Sharing and Education (R.A.I.S.E.) Training Sessions

The R.A.I.S.E. program offers stand-alone training sessions that are open to any interested Carnegie Mellon employee. Session topics vary and are intended to provide information on current 'hot topics' with federal sponsors, specific agency requirements, institutional processes or organizational best practices. Sessions are led by experienced professionals internal to Carnegie Mellon, unless otherwise noted.

Graduate Research Fellowship Program (GRFP) Webinar on Feb. 8 from 9 – 10:30 a.m.

This pre-recorded session presented by the Federal Demonstration Partnership (FDP)

provides a summary of the history and goals of the GRFP program, specifically noting the multiple responsibilities for institutions and fellows and the new GRFP module in [research.gov](https://www.research.gov) under Fellowships & Honorary Awards.

For more information, visit the [Research Administration training webpage](#) or visit [FocusU](#) to register. For questions, contact Teri McCort, manager, Sponsored Projects Accounting and Compliance, at teriz@andrew.cmu.edu.

Strategic Initiatives Updates

Finance Division Strategic Plan FY23 – FY27 Project

Since October 2021, the Finance Division has been developing and socializing the Finance Division Strategic Plan 2023 – 2027. Since the [last project update](#), the Finance Division has been working diligently obtaining the necessary approvals and making final adjustments to the strategic plan, as well as creating and launching a website that details the new plan.

We are excited to announce that the [Finance Division Strategic Plan 2023 – 2027](#) is live! The new plan includes a refreshed division mission, vision and values, as well as high-level goals for the next five years, which focus on four key areas:

- Employee recruitment, development and engagement
- Financial sustainability and reporting
- Policies, processes and compliance
- Systems and technology

This five-year plan serves as a blueprint that will shape the university's finance function to elevate financial talent, drive procedural and technical efficiencies and result in predictive and prescriptive insights that support optimal business performance.

We hope you take some time to explore the new [Finance Division Strategic Plan 2023 – 2027 website](#), which in addition to outlining the strategic plan and progress toward our strategic goals and initiatives, also includes some exciting features that showcase our division staff, guiding principles, and a video message from Angela Blanton, vice president for Finance and chief financial officer.

Thank you to the stakeholders from across the university and Finance Division staff members who provided vital feedback and insight, which was critical to the development process of the new strategic plan and website.

If you have any questions or comments related to this effort, please reach out to [Angela Blanton](#), executive sponsor and vice president for Finance and chief financial officer, [Monique Polas](#), project lead and assistant treasurer or any members of the [Finance Division leadership team](#) who served as the steering committee and goal ambassadors for this effort.

Thank you for your feedback and collaboration in making the Finance Division Strategic Plan 2023 - 2027 a success!

Future of Financial Planning at CMU

Carnegie Mellon University has embarked on The Future of Financial Planning (FFP) at CMU, a multi-phase budget and financial planning system implementation project that will improve annual budgeting, forward looking forecasts, performance drivers and analysis, and reporting capabilities at the university.

Phase one is currently underway and includes issuing a request for proposal (RFP) to identify a consulting firm. The project team and steering committee created and reviewed the RFP document in October 2022. The RFP was distributed on Nov. 4, 2022, and four proposals were received by the Dec. 9, 2022, deadline. In December 2022, the project team and steering committee reviewed the proposals and completed scorecards to rank the proposals against identified criteria, and the project team worked through final evaluations to determine a recommended supplier. The recommended supplier will present their proposal to the project team, including the project sponsors and steering committee, on Jan. 25. The next steps are to obtain the necessary approval to award the consultant, which will close out phase one of the project.

Visit the [Future of Financial Planning at CMU project page](#) for more information. For questions about this project, contact Brent Carothers, associate vice president, Budget and Financial Planning, at brentcarothers@cmu.edu or 412-268-4513.

New! Department Spotlights

The Finance Division is pleased to introduce Department Spotlights, a new feature implemented following the feedback received from the 2022 Finance Division Customer Service Survey to increase campus engagement and to educate campus. Each month, a Finance Division department will be highlighted in the Finance Bulletin with an article focusing on the department's key functions and services, notable accomplishments and contributions, how the department's work supports the Finance Division's mission and values, and how it impacts other units across campus. In addition, the department will attend an Administrative Leadership Group (ALG) meeting to introduce the department's staff members and help colleagues across campus put faces to names and foster connection. We hope that you find the Department Spotlights meaningful and informative. For questions, contact Finance Communication at fin-comm@andrew.cmu.edu.

Department Spotlight: Accounts Payable

What are the key functions and services of the Accounts Payable department?

Accounts Payable (AP) processes vendor invoices and university PayDocs, payments to vendors, expense reports for faculty, staff and students as well as creates and maintains the university's supplier database. AP strives to provide excellent customer service through collaborating with campus partners while ensuring compliance with the policies and procedures of the university.

What are some ways that Accounts Payable contributes to the success of your campus partners/customers?

The AP staff processes university invoices on average within 7 days of receipt and in accordance with university policies and procedures. In addition, we process payments multiple times a week to ensure timely payment to university vendors and faculty, staff and students receiving expense reports. In fiscal year 2022, the AP staff processed over 110,000 documents, which includes invoices, non-employee expense reports (NEX), payforms, self-service expense reports and PCards. AP updated and/or created over 11,500 supplier records and over 6,800 NEX suppliers. AP also processed over 900 Accounts Payable Redistributions.

How does Accounts Payable interact, collaborate, and engage with other departments across campus?

The AP team interacts with campus via email using the AP Help inbox (ap-help@andrew.cmu.edu), telephone calls, and Zoom meetings. We collaborate and engage with stakeholders across the university through in person meetings that include question/answer sessions, and the Automation Allies group meetings.

What is one thing you wish people knew about Accounts Payable that they may not know?

We are responsible for the Accounts Payable function for the entire university, including all domestic and international campuses.

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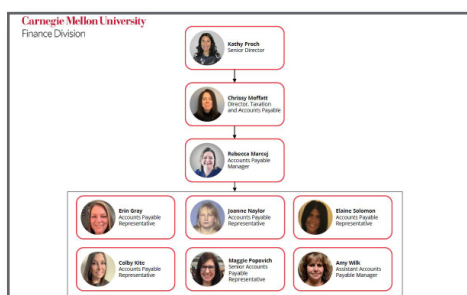
Department Spotlight: Accounts Payable (continued)

Which Finance Division values does Accounts Payable most exemplify and how?

- **Collaborative Innovation:** With the implementation of the Enterprise Content management (ECM) project, we collaborate with campus partners to ensure that we are considering implementing changes based upon their feedback to ensure an efficient and effective process. We are continuously looking for ways to make the AP process more user-friendly. We are proud of our continued engagement with the Automation Allies as this is a collaborative group where the AP team is able to discuss best practices and opportunities for process improvement.
- **Strength in Execution:** The AP team works in conjunction with campus to understand their needs and when something out of the ordinary happens, we do our best to ensure that the needs of the campus community are met.

What is your department most proud of accomplishing in the last few years?

With the pandemic causing the entire university to work remotely, the AP team was able to quickly adjust to a remote working environment and met all required deadlines and processed payments.



To view the full AP Department Spotlight along with an organizational chart that features photos of each department employee, visit the Finance Division News webpage. It is our hope that this information increases campus engagement and helps colleagues across campus put names to faces and foster connection.

For more information about AP, visit the AP webpage or contact AP at ap-help@andrew.cmu.edu.

2023 IRS Mileage Rates

As of Jan. 1, 2023, the standard mileage rates for the use of a car, van, pickup or panel truck are:

- **65.5 cents** for every mile of business travel driven, which is an increase of 3 cents from the 2022 rate
- **22 cents** per mile driven for medical or moving purposes
- **14 cents** per mile driven in service of charitable organizations

The business mileage rate increased from 2022. The medical and moving expense and charitable rate is set by statute and remains unchanged. Please contact Kathy Proch at 412-268-5158 or kproch@andrew.cmu.edu for questions regarding these rates.

Finance Forms Updates

Designated Department Financial Representatives Listing [pdf]

The following updates were made as of Jan. 17:

- Bruce Hannington is now the DDFR for the CFA School of Design
- Jennifer Joy Wilson has been added as an additional DDFR for CFA's Miller Gallery
- Robert Bodnar is now the DDFR for SCS's Computational Biology Department
- Blair Dunckel and Keith Webster have been added as additional DDFRs for University Libraries
- Tricia O'Reilly is now the DDFR for the President's Office

Payroll News

Tax Documents to Be Mailed by Jan. 31, 2023

Form W-2

W-2 Tax Forms for 2022 will be mailed to all employees who were paid wages in 2022 by Jan. 31, 2023. The Form W-2 will be sent to the primary address that an employee has recorded in Workday and will be available for [download in Workday \[pdf\]](#).

In preparation for the upcoming tax season, employees and student workers are encouraged to confirm the following in Workday:

- Primary address information: As stated above, CMU will send your W-2 to the primary home address you have recorded in Workday. For instructions on viewing and updating home contact information, refer to [Section I of the Update Contact Information System Guide \[pdf\]](#).
- Social Security Number (SSN): All employees and student workers must have a valid and correct SSN recorded in Workday. For instructions on entering your SSN information into Workday, please reference the [Change My Government IDs System Guide \[pdf\]](#).

Form 1095-C

Forms 1095-C for 2022 will also be mailed out by Jan. 31, 2023. Form 1095-C contains information about your healthcare coverage and your dependents' healthcare coverage, if applicable. This form is considered your proof of insurance for the IRS. Carnegie Mellon University issues a Form 1095-C to any employee with U.S. taxable income who was enrolled in healthcare coverage or considered a full-time employee, as defined by the Affordable Care Act, at any time during 2022. To request a copy, contact HR Services at 412-268-4600 or hr-help@andrew.cmu.edu.

Guided Buying

Procurement Services launched a [Guided Buying page](#) on their website in December 2022. This site aims to provide university buyers with an efficient and effective way to:

- Buy the goods and services necessary to support the university's research and education mission
- Browse supplier catalogs specifically tailored to CMU with already negotiated pricing
- Complete transactions directly within the supplier catalog using a university purchasing card
- Comply with university purchasing policies and procedures

Buyers are encouraged to visit the Guided Buying site and follow the steps in the "How It Works" section to begin leveraging this important tool. Please note that this page is a pilot and more suppliers will be added over time, so check back often.

For questions, contact Procurement Services at procurement-inbox@andrew.cmu.edu.

Employee Updates

- [Matthew Duffey](#) has been promoted to Principal Sponsored Research Accountant, as of Jan. 17.
- [Lauren Felix](#) has joined International Finance as an accountant, as of Dec. 19, 2022.
- [Hannah Gloeckl](#) has been promoted to manager, Payroll Services, as of Dec. 12, 2022.
- [Jen Riegler](#) has been promoted to team lead, payroll accounting, as of Jan. 10.
- Lisa Daniels, associate global payroll specialist, is no longer with the university as of Jan. 12. For questions, contact [Deborah Stackhouse](#)

Training News

Training is required to obtain access to university financial systems and to become an authorized university cardholder. To determine what training is needed, view the [Training Matrix \[pdf\]](#) for a full list of required Oracle training or visit the [Finance Training page](#) for training plans and resources.

E-Learning

E-Learning courses are hosted by the Carnegie Mellon Open Learning Initiative (OLI) or FocusU. To access OLI courses, you must first create an account with OLI and register for the course(s) of your choice. For first time OLI course users, read the [OLI Login Instructions \[pdf\]](#). Returning OLI course users can proceed directly to the [OLI courses homepage](#).

To access FocusU courses, faculty and staff can log in with their Andrew ID and password. Students and contingent workers should contact fin-train@andrew.cmu.edu for online course materials.

Course Name	Hosted By	Course Key
Introduction to Purchasing	FocusU	n/a
CMU Finance Fundamentals	OLI	cmufinfun
Oracle 101	OLI	oracle101a
Oracle Internet Expenses - Procurement Card Application	OLI	pcard
Oracle Internet Expenses - Expense Reporting Application	OLI	ieexpenserpt
Purchasing Card (PCard) Training	OLI	cmupcard
Purchasing Card Refresher Training	OLI	pc-refresh
Introduction to PCI DSS @ Carnegie Mellon	OLI	PCIDSS22

Instructor-Led Training (Currently via Zoom)

Instructor-led training provides specific financial systems, policy and procedure information necessary to obtain access to the Oracle financial systems, the Financial Data Warehouse and for becoming an authorized university buyer using a Purchasing Card, Travel Card or Purchase Order. Some training classes have required prerequisites, so review the course descriptions for prerequisite information.

Faculty and staff can register for the instructor-led training classes via [FocusU](#). Students and contingent workers should contact fin-train@andrew.cmu.edu to register. Detailed information will be shared with registered attendees regarding Zoom web conferencing in lieu of in-person sessions.

Course Name	Date	Time
FIN – Financial Data Warehouse 101	Feb. 9	1:30 - 4 p.m.
FIN – Oracle GL Journal Entry	Feb. 15	1:30 - 4:30 p.m.
FIN – Oracle Purchase Order Training	Feb. 21	1 - 4:30 p.m.
FIN – Payroll Distribution Adjustment Training	Feb. 23	1:30 – 3:30 p.m.

Oracle Financials Maintenance Dates

- Feb. 9 from 7 - 9 p.m. EST
- Feb. 18 from 9 a.m. - 1 p.m. EST

University Contracts Office News

To increase efficiency moving forward, the University Contracts Office (UCO) asks that you review this list when submitting requests. Following these pointers will limit back-and-forth emails for additional or necessary information and result in a faster turnaround time.

1. Submit all initial requests to the UCO inbox at university-contracts@andrew.cmu.edu
2. Put the vendor's name and type of request in the subject line (e.g., XYZ Inc. – Quote Approval)
3. Do not include the vendor in the email and only copy others, if necessary.
4. Unless requested by the UCO, do not include W-8 forms or W-9 forms with your requests
5. Provide a brief description of what is needed and why in the body of the email.
6. Specify if sponsored or federal funds are going to be used in the transaction.
7. Only reply to our emails if the UCO requests information or if it is necessary for you to do so
8. If necessary, request that vendors send you their certificate of insurance electronically and forward them to the UCO inbox

For additional information, visit the [UCO website](#).

ALG Topics - Dec. 15 and Jan. 19

Dec. 15

- Purchase Order Importance
- Office of Human Resources Updates
- Performance Management Preview
- Family Care Initiatives
- Hourly Student Employment

Jan. 19

- Finance Division Strategic Plan Update
- Collegiate Travel Partners (CTP) Update
- New Supplier Search Tool
- Office of Human Resources Updates
 - » Performance Management Reminder
 - » Lean Six Sigma and the Administrative Professionals Training Program
 - » United Way
 - » Cyert Registration
- COVID-19 Update

Contact

To contact a Finance Division staff member, view the [Finance Division directory](#). For questions about the Finance Bulletin, contact Finance Communications at fin-comm@andrew.cmu.edu.