Finance & Admin Update

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

Upcoming Dates

Agiloft Contract Management Training
Thursday, August 15
1:30 – 3:15PM

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Labor Day is Monday, September 2nd

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Finance Collaborative
Wednesday, September 4th, 9:00 – 10:00AM

***New!* Dates & Deadlines!**

Chart of the Month

Going Digital: Check vs. Digital Payments
Fiscal Year 2022 - 2024
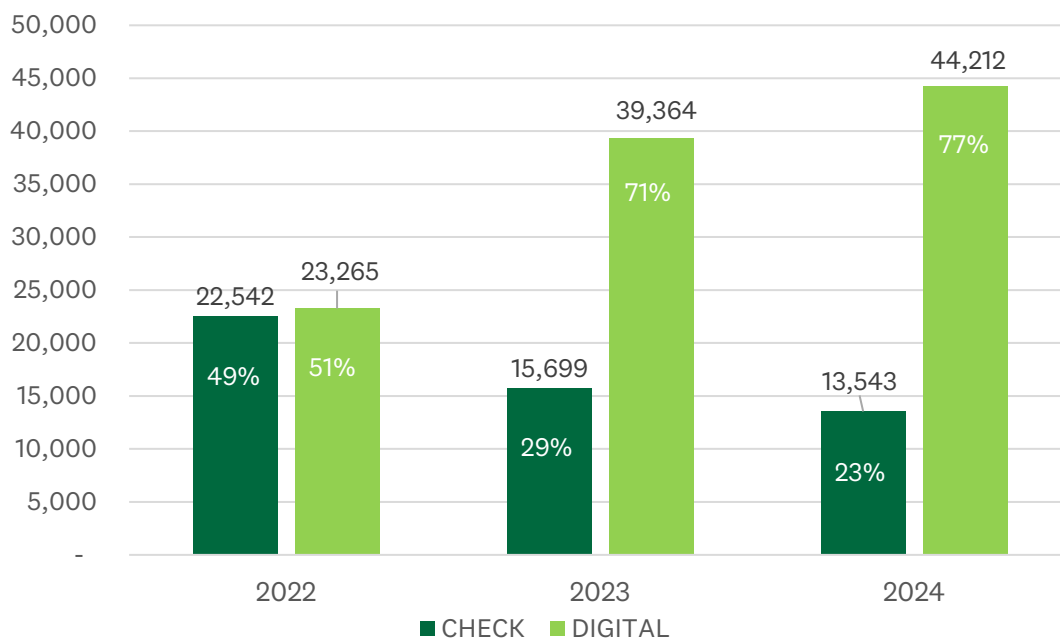
Source: Institutional Reports Analysis – AP Check Payments (Fiscal Year 2022 - 2024)

Dartmouth has a long-standing goal to go paperless wherever possible to improve efficiency and expedite payments to our vendors, employees and students. We are making progress! The chart above shows a breakdown of digital payments processed through Accounts Payable (AP). Even with a 21 percent increase in AP payments, the proportion of digital payments has grown from 51 percent to 77 percent.

Digital payments processed through AP include payments to vendors using a virtual card (SUA), domestic bank transfer (ACH), and international wires; student payments through our J.P. Morgan Chase digital payments via Zelle or ACH and international wires; and employee expense reimbursements via electronic fund transfers (EFT).

Encourage vendors to review the Vendor Guide, to choose a digital payment method on their PaymentWorks payment profile, and to submit invoices to Invoice@dartmouth.edu for the most efficient payment processing. Vendors who choose a digital payment method in PaymentWorks will receive payment upon processing for virtual card payments and within 30 days for ACH.

Finance Staff Update

Congratulations to **Whitney Henry,** who has been promoted to VP for Finance and Administration and will be expanding her role to include oversight of Financial Planning, in addition to her current oversight of Treasury and Procurement. Whitney will also be working more closely with the Resources Committee and with Dianne Ingalls in her role as the VP for Finance and Controller.

Welcome **Kasey Robinson,** who has joined Campus Billing & DartCard Services team as a Financial Account Specialist.

Labor Day is Monday, September 2nd

Labor Day Student Payroll Schedule
Student Employees Timesheet Submission
Due by Saturday August 31st, 11:59PM
Supervisor Review & Approval
Due by Tuesday, September 3rd, 11:00AM
Reminder: There is no need to wait until Tuesday to review and approve, if your student submits their timesheet prior to the weekend!!

📌 Reminder for Biweekly Employees
Biweekly Paid Employees should report Hol on the Kronos timecard for **Monday, September 2nd**.

➕ ✖	Sun 9/01		
➕ ✖	Mon 9/02	Hol	7.5
➕ ✖	Tue 9/03		

Kronos to the Cloud

We are excited to announce an upgraded Kronos Timekeeping experience for all biweekly (non-student) employees for the pay period beginning October 6th. Accurate time reporting and payment is essential for all employees, and this upgrade helps us achieve that goal. The upgraded Kronos environment, powered by UKG, a global leader in HR, Payroll, and workforce management, provides an integrated timekeeping system that is:

- 💻 **Easy to access** – includes information when you need it, 24/7 via browser or timeclock
- 🗓 **Easy to use** – features alerts and notifications to timecard exceptions and tasks
- 😜 **Easy on the eyes** – offers a modern look and feel with intuitive interface

Join us for the Kronos to the Cloud Information Forum via Zoom on **Thursday, August 15th** from **1:00 – 1:45PM**. If you are unable to attend, do not worry! This session will be recorded and made available on the Kronos to the Cloud Upgrade project site.

Expense Reporting Itemization

The Business/Travel Itemization template for travel and business expense reporting has been updated to allow submitters to identify when an expense has been charged to a corporate card. This information will assist those who are completing an iExpense Expense Report with the information necessary to ensure all corporate card expenses have been posted and applied to the expense report prior to submitting the expense report for processing.

Type of Expense	Corp Card Chg	Receipt attached
Lodging	Y	Y
Ground Transportation	Y	N
Airfare	N	Y
Meals	N	
	Y	
	N	

Hiring Independent Contractors
Reminders and Resources

When you are hiring an individual to perform services or provide goods for Dartmouth, there are several considerations to ensure that the individual can legally be hired as an independent contractor. The Hiring Independent Contractors & Guest site and the *updated* Independent Contractor Decision Tree outlines this information to ensures that you are able to efficiently determine the most appropriate method for hiring independent contractors.

The two primary routes for hiring an independent contractor are through a Limited Engagement Agreement or Independent Contractor/Consultant Agreement.

Limited Engagement Agreements are designed for individuals who will be providing a good or service that has a total value of the engagement with Dartmouth of less than $5,000 within a 12-month period.

To help verify that an individual can be hired using the "Limited Engagement Agreement" or a "Limited Works Made for Hire," we have developed an Independent Contractors Dashboard within Agiloft that has two tables. The "Limited Engagement Eligible?" table offers a searchable list of all identified independent contractors and identifies if they are eligible for a limited engagement and the total value of their contract in the last 12 months. This total contract value will allow you to compare the vendor's annual total contract value with your agreement value. If it exceeds $5,000, then you will need to verify if there

Eligible...	Total value
No	$20,005
Yes	
Yes	$1,110

is an active Independent Contractor Questionnaire on file within the Independent Contractor Questionnaire table on this same dashboard. If not, the vendor must provide an Independent Contractor Questionnaire to Procurement Services and once approved, an Independent Contractor Services Agreement would need to be requested.

Finance Navigator AI Chatbot – We need your feedback!

Finance, in collaboration with ITC Research Computing and Data Services and the Dartmouth Libraries Research Data Services, is working on an AI Chatbot leveraging Dartmouth's Chat as a proof of concept for broader institutional application. The Finance Navigator uses LLM technology to scour our website's content and provides a conversational interface to website visitors.

The Finance Navigator is currently in a prototype phase and we need your help to pose questions to the tool and provide feedback on the effectiveness and quality of the answers to the project team.

How it works?

Type in a question in the "How can I help?" field and click the go arrow.

A query will generate an answer to your question. As it is generating you will see the query an indicator running in the upper right-hand corner:

Once it is complete, review the answer and the related "Context".

If the response is correct results give the Navigator a 👍 "thumbs up". If the answer is incomplete or wrong, give it a 👎 "thumbs down". Provide feedback in the comments field, and click **Submit**.

Please send additional feedback, questions, or errors and screenshots, if appropriate to simon.stone@dartmouth.edu.

The greater the participation from our community, the higher the quality of the results and the more effective and expansive the solution becomes for our campus. Your participation is vital!

New Supplier Diversity Site

Check out our new Supplier Diversity site within the Dartmouth Vendor Guide. Dartmouth strives to promote diversity and inclusion in all that we do and that includes the vendors with whom we do business. If you work with or know of diverse suppliers, we encourage you to send them the link to this site and ask them to register, regardless of whether Dartmouth is currently engaged in business with the vendor.

Upcoming System Training

Agiloft Contract Management Training
- Thursday, August 15, 1:30 – 3:15PM
- Thursday, September 12, 1:30 - 3:15PM

OnBase Unity Client: Getting Started
- Wednesday, September 11, 9:00 – 10:00AM
- Wednesday, November 13, 9:00 – 10:00AM

BECOME AN EMAIL SUPERHERO

By
Matthew Gilliland
Sean McNamara

BY FOLLOWING THESE BEST PRACTICES, YOU CAN BE A PART OF THE EMAIL SECURITY SUPERHERO TEAM, PROTECTING DARTMOUTH COLLEGE'S DIGITAL CITY FROM CYBER THREATS. STAY VIGILANT, STAY INFORMED, AND TOGETHER, WE CAN KEEP OUR CYBERSPACE SAFE.

VERIFY SENDERS AND RECIPIENTS

BEFORE SENDING EMAILS, ALWAYS VERIFY RECIPIENTS TO ENSURE YOU'RE SENDING INFORMATION TO THE RIGHT INDIVIDUALS. WHEN RECEIVING EMAILS, CHECK FOR SIGNS OF A SUSPICIOUS SENDER, SUCH AS UNUSUAL EMAIL ADDRESSES.

DON'T CLICK EMAIL LINKS

HOVER YOUR MOUSE OVER HYPERLINKS IN EMAILS TO SEE THE ACTUAL LINK. THE BEST WAY TO AVOID HARMFUL LINKS IS TO BOOKMARK IMPORTANT LINKS AND TYPE DOMAINS DIRECTLY INTO YOUR BROWSER, RATHER THAN COPYING/PASTING OR CLICKING DIRECTLY ON THE LINK.
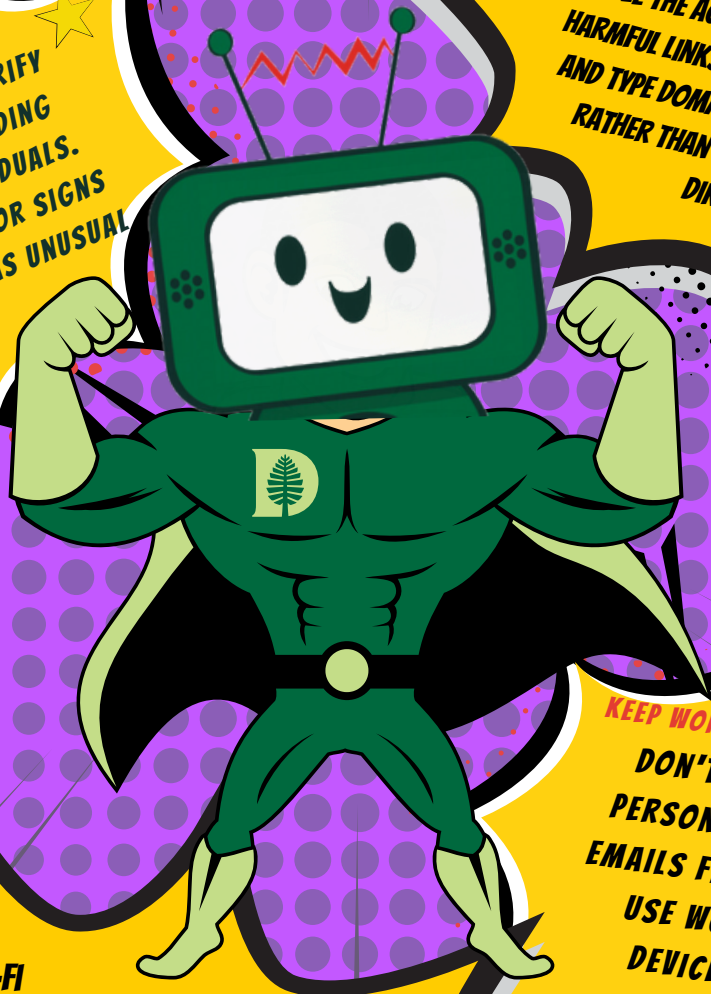
KEEP WORK AND PERSONAL EMAILS SEPARATE

DON'T SEND WORK EMAILS FROM PERSONAL ACCOUNTS OR PERSONAL EMAILS FROM WORK ACCOUNTS. ONLY USE WORK EMAIL ON APPROVED DEVICES TO ENSURE A SECURE ENVIRONMENT.

- AVOID PUBLIC WI-FI
- ALWAYS AVOID OPENING ATTACHMENTS FROM AN UNKNOWN SENDER
- ENCRYPT ATTACHMENTS WITH SENSITIVE INFORMATION
- ONLY USE WORK EMAIL ON APPROVED DEVICES
- LOG OUT AT THE END OF THE DAY
- STAY INFORMED AND TRAIN REGULARLY