

# 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

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## Chart of the Month

### Make an Impact Today!

### Join the Dartmouth Granite United Way Campaign

The [2024 Dartmouth United Way Campaign](#) is your opportunity to unite with colleagues, support our neighbors, and strengthen the Upper Valley. The Granite United Way plays a critical role in addressing urgent needs, offering vital resources, health services, and family support.

#### Why Give?

Our goal is ambitious—\$250,000 to uplift our community and create opportunities for everyone to thrive. Whether you contribute financially, volunteer your time, or spread the word, your actions build a brighter future right here at home.

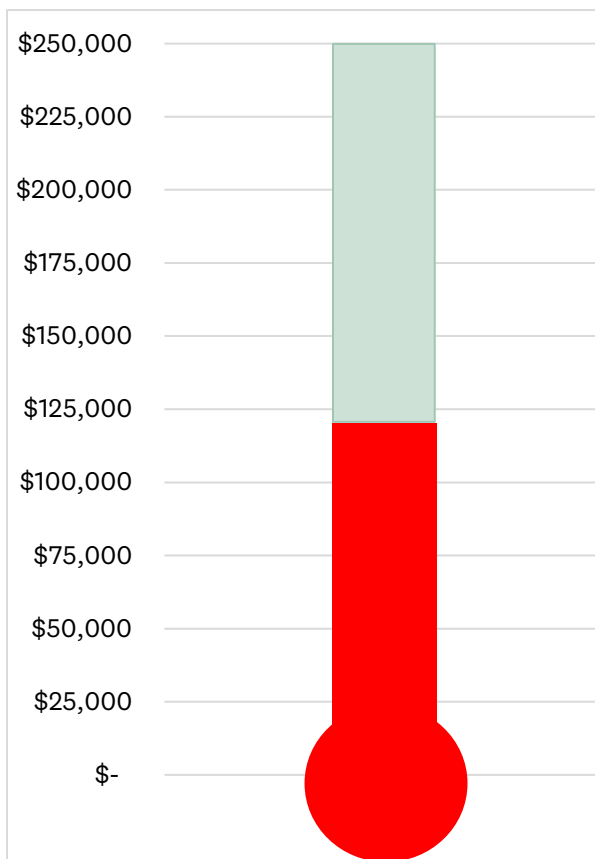
#### How You Can Help:

- **Donate:** Every dollar matters.
- **Volunteer:** Your time is invaluable.
- **Advocate:** Encourage friends and colleagues to join the cause.

#### Important Reminder!

**Payroll Deduction Deadline:** Thursday, December 12, 2024. Don't miss this easy and efficient way to contribute — [sign up today!](#) New contributions begin in January 2025.

Together, we can make a meaningful difference. Thank you for your generosity and commitment to the Upper Valley!



Source: 2024 Dartmouth United Way Campaign

## Welcome and Farewell

Please join us in welcoming our newest colleagues to the Finance & Admin area:

Darshana KR Griggs, *Contract Manager*, Procurement Services

Jennifer Longval, *Claims Adjuster*, Risk Management

Arturo Salmeron, *Assistant Director for Finance and Reporting*, Arts & Sciences Finance Center



**Congratulations to Donna Megliola, HR Business Partner,**  
on her retirement on December 20th!



## Leverage Big Think+ Diversity Training

In today's diverse and dynamic work environment, fostering an inclusive culture is more important than ever. [Big Think+](#) offers a wealth of resources to help achieve this goal through engaging and insightful diversity training videos. Here is how to leverage these resources within your team:

- Engage with expert insights and perspectives
- Promote open dialogue about the challenges and benefits
- Gain real-world examples of diversity in action
- Utilize microlearning for maximum impact on learning

By leveraging the diverse range of videos, we can develop the skills to create a more inclusive and innovative workplace.



## Celebrate Excellence: Submit Nominations for the Staff Recognition Awards!

Dartmouth is powered by extraordinary staff who bring our mission and values to life every day. The [Lone Pine Staff Recognition Program](#) provides a platform to celebrate these outstanding contributions. Do your part to help foster a deeper culture of appreciation across our institution by nominating a colleague.

This year, nominations are open for seven prestigious awards:

1. **Sheila Culbert Distinguished Employee Award:** This flagship award recognizes a staff member with at least five years of service who exemplifies consistent excellence in their work and embodies Dartmouth's core values.
2. **Lone Pine Excellence Awards:** These awards honor staff members with at least one year of service who go beyond their job description in ways that support Dartmouth's Core Values. These individuals excel in specific award categories and model collaboration, innovation, and inclusion.

### Why Nominate?

By submitting a nomination, you have the chance to spotlight colleagues who inspire others through their dedication, innovation, and commitment to fostering a welcoming and inclusive community.

### How to Nominate

The nomination period is open until **5:00 PM on December 20, 2024**. Take a moment to reflect on colleagues who deserve recognition and [submit a nomination](#) to honor their exceptional efforts.

Let's celebrate the remarkable people who make Dartmouth an extraordinary place to work and thrive. Do not miss this opportunity to highlight the contributions that make a difference!

## Upcoming System Training



### Agiloft Contract Management Training

- [Thursday, January 9, 2:15 – 4:00PM](#)
- [Thursday, February 6, 1:00 – 2:45PM](#)



### OnBase Unity Client: Getting Started

- [Wednesday, January 22, 9:00 – 10:00AM](#)
- [Wednesday, March 12, 9:00 – 10:00AM](#)



### Agiloft IRA Reports Training

- [Wednesday, January 15, 9:00 – 10:00AM](#)
- [Wednesday, February 12, 9:00 – 10:00AM](#)

[Go here for online Financial Systems Guidance](#)

## Handling Personal Expenses on the Dartmouth Corporate Card

Charging personal expenses to your Dartmouth corporate card is not permitted. However, we understand that mistakes can happen, and personal purchases may occasionally be charged unintentionally. If this occurs, the expense must still be processed in iExpense, and the funds must be reimbursed to Dartmouth promptly, as required by the [Business Expense Policy](#).

Reimbursement is required to be completed within 90 days of the transaction date. Failure to do so will result in the corporate card being placed on hold ("suspended") until the reimbursement is received.

### Here is how to address this:

1. **Create an Expense Report in iExpense:**
  - In the **Business Purpose** field, enter "Personal Expense."
  - Process the corporate card charge and route it for approval.
  - Note the OIE Expense Report number and amount for reference.
2. **Reimburse Dartmouth:**
  - Visit the [Returning Funds for Personal Expense Charged to a Corporate Card](#) page.
  - Select the **Pay Personal Expense** button.
  - Follow the prompts to input your details, including the debit or credit card you will use to reimburse the charge.

By following these steps, you will ensure compliance with the policy, avoid inefficiencies caused by tracking and reporting outstanding personal charges, and prevent potential disruption to your corporate card access.

## New Annual Performance Plan and Evaluation Process

Dartmouth Human Resources is excited to unveil a revamped [Annual Performance Plan and Evaluation Process](#) designed to foster a more collaborative, growth-oriented approach for staff and supervisors. This initiative, effective for staff who began their roles on or before October 1, 2024, emphasizes ongoing conversations about performance, career development, and achieving shared goals.



### Key Highlights of the New Process

The updated framework is intuitive and straightforward, providing:

- **Opportunities for Reflection and Planning:** Staff can review accomplishments, identify challenges, and set future goals collaboratively with supervisors.
- **Clear Steps:** From drafting plans to supervisor evaluations, e-signatures, and uploads, the process ensures alignment and transparency.
- **Continuous Engagement:** Regular check-ins encourage staff and supervisors to maintain and adapt goals throughout the year.



### Skill Development Through Microlearning

Dartmouth HR Learning and Development has introduced self-directed [Microlearning Paths](#)

tailored to enhance performance discussions:

- **For Staff:** Guidance on setting goals and leveraging the evaluation process for career growth.
- **For Managers:** Tools to conduct meaningful performance discussions and provide constructive feedback.

These learning paths feature engaging content and practical resources to ensure a positive and productive evaluation experience.

### Timeline

- **October 1, 2024:** Eligibility date for completing the Annual Performance Plan.
- **November 2024 – February 2025:** Draft, discuss, and finalize plans.
- **March 3, 2025:** Deadline for uploading completed plans via the online tool.

### A New Era for Performance Management

The revised process moves away from traditional performance ratings, focusing instead on open dialogue and mutual accountability. It aligns with Dartmouth’s commitment to creating a workplace culture of continuous improvement and professional development.

Staff and managers can access templates, resources, and learning paths through Dartmouth's HR portal or by consulting with their HR Business Partner.

This innovation in performance management underscores Dartmouth’s dedication to empowering its employees, fostering collaboration, and achieving shared success.

## Updated: Recording Time for Winter Break 2024

All Regular Benefited Non-Exempt employees will need to record hours for the winter break as follows:

### For the Pay Period December 15 - 28, 2024:

- Record “Hol” for **December 24<sup>th</sup> and 25<sup>th</sup>**
- Record “Winter Brk” for **December 23<sup>rd</sup>, 26<sup>th</sup>, and 27<sup>th</sup>\***

### For Pay Period December 29, 2024 - January 11, 2025:

- Record “Hol” for **January 1<sup>st</sup>, 2024**
- Record “Winter Brk” for **December 30<sup>th</sup> and 31<sup>st</sup>, and January 2<sup>nd</sup> and 3<sup>rd</sup>\***

+	⊖	Mon 12/23	Winter Brk	8.00
+	⊖	Tue 12/24	Hol	8.00
+	⊖	Wed 12/25	Hol	8.00
+	⊖	Thu 12/26	Winter Brk	8.00
+	⊖	Fri 12/27	Winter Brk	8.00

+	⊖	Mon 12/30	Winter Brk	8.00
+	⊖	Tue 12/31	Winter Brk	8.00
+	⊖	Wed 1/01	Hol	8.00
+	⊖	Thu 1/02	Winter Brk	8.00
+	⊖	Fri 1/03	Winter Brk	8.00

\*If you work any Winter Break days, you should record your hours as normal.

## Planning a trip to the United Kingdom?

### Travelers are Required to be Authorized to Enter the UK in 2025!

Beginning **January 8, 2025**, all US, Canadian and non-European passport holders must obtain an [Electronic Travel Authorization \(ETA\)](#) from the UK government to enter or travel through the UK. Travelers *must* secure their ETA before departure to avoid flight boarding or UK entry issues.



#### Key Details About the ETA

- **Purpose:** The ETA is required for short stays (up to six months) for purposes such as tourism, business, family visits, or short-term study.
- **Transit Requirement:** It is also mandatory for travelers traveling through the UK.
- **Who Needs It:**
  - **Effective January 8, 2025**, all US, Canadian and non-European passport holders. An ETA can be applied for now for travel on or after January 8, 2025.
  - **Effective April 2, 2025**, this expands to any non-British and non-Irish citizens, as well as any non-visa holders for the UK. An ETA can be applied for beginning March 5, 2025, for travel on or after April 5, 2025.
- **Application Process:**
  - Complete an [online application](#).
  - Provide passport details, a digital photo, and pay a non-refundable fee of £10.00 (approximately \$13.00).
  - Processing typically takes **three working days**.
- **Validity:** The ETA will be digitally linked to the traveler's passport and remains valid for two years or until the passport expires, whichever comes first.

#### Action Required

To avoid disruptions to your travel plans:

1. Apply for the ETA well in advance of your trip.
2. Ensure your passport is valid for the duration of your travel.
3. Apply for an ETA via the [ETA Application Link](#).

For more information about the UK's ETA requirement, visit the [UK government's ETA website](#).

## Reminder: REAL ID Requirements for May 7, 2025

Starting **May 7, 2025**, a REAL ID-compliant driver's license or identification card will be required to fly domestically and access certain federal facilities. To get a REAL ID, visit your local DMV with documents proving your identity, Social Security number, residency, and legal status.

#### What is a REAL ID?

A REAL ID is a state-issued driver's license or identification card that meets increased security standards set by the federal government. These standards were established to improve the reliability and accuracy of state-issued identification documents, which in turn helps to inhibit terrorists' ability to evade detection by using fraudulent IDs.

#### How to Get a REAL ID

- **Check Your Current ID:** Look for a star or other marking on your current driver's license or ID card. This indicates whether it is REAL ID-compliant.
- **Gather Required Documents:** Collect the necessary documents that prove your identity, Social Security number, residency, and legal status.
- **Visit Your Local DMV:** Schedule an appointment at your local DMV office to submit your documents and apply for a REAL ID.



If you do not have a REAL ID by the deadline, you can use other forms of identification like a valid U.S. passport or a DHS trusted traveler card. Make sure to start the process early to avoid any last-minute issues!

For more details, visit the [Department of Homeland Security's REAL ID page](#).

# 2024 Finance and Finance Center Winter Break Processing Deadlines

## Accelerated Winter Break Deadlines

Task	Form/Location	Date
End of Year Purchases – e.g., end of year discounts on equipment, etc.	<a href="#">Purchase Request eForm</a> , or <a href="#">Agiloft Contracts</a>	Monday, December 2
All PASF for Bi-Weekly & Monthly HRMS	<a href="#">General Request HR/Payroll eForm</a> <a href="#">PASF</a> , if authorized for direct entry	Friday, December 6
All MYLS and Wage Transfers	<a href="#">MYLS eForm</a> , <a href="#">Wage Transfer eForm</a>	Wednesday, December 18
All Corrections, Journals, Transfers	<a href="#">Corrections and Journal eForm</a>	Friday, December 20
All PCard transactions	<a href="#">PCard eForm</a>	Monday, December 9
All AP Entry	<a href="#">Payment Request eForm</a>	Monday, December 9
AP Pickup checks cut***	7 Lebanon St, 302	Wednesday, December 18
All deposits made through Cashier’s Office	<a href="#">Miscellaneous Receipt</a>	Friday, December 20, 12:00pm

\*\*\*Any checks at 7 Lebanon St, 302 after 3:00pm on Wednesday, December 18<sup>th</sup> will be mailed to the address shown on the check

## Accelerated Student Payroll Winter Break Deadlines

Task	Responsible Person	Date
Record all hours for 12/8-12/21	All Student Employees	Thursday, December 19, 11:59pm
Corrections and Approval Complete	Student Supervisors	Friday, December 20, 11:00am
Finance Center Approval Complete	Finance Center	Friday, December 20, 4:00pm

## Accelerated Biweekly Payroll Winter Break Deadlines

Task	Responsible Person	Date
Record all hours for 12/15 -12/28	All Biweekly Non-Union Employees	Thursday, December 19, 4:00pm
Time Detail Report Run	Finance Center	Friday, December 20, 7:00am
Corrections and Approval Complete	Biweekly Non-Union Supervisors	Friday, December 20, 11:00am
Finance Center Approval Complete	Finance Center (Non-Union)	Friday, December 20, 4:00pm
Weekly Union Approval Complete	Union Payroll Supervisors	Sunday, December 29, 9:00am
Finance Center Approval Complete	Finance Center	Sunday, December 29, 4:00pm

## Month End Close for December 2024

Oracle Grants Accounting (OGA) generally closes on the first business day of the month and Oracle General Ledger (GL) closes on the third business day of the month. Due to the extended Winter Break, December 20<sup>th</sup> – January 3<sup>rd</sup>, **OGA will close on Monday, January 6<sup>th</sup> and GL will close on Wednesday, January 8<sup>th</sup>.** Go to the [Month End Close Schedule](#) for general information and process details.



# Don't Get Caught in a Phishing Scam

Unsure if that  
Email, Phone Call, or Text  
is a Scam?

**Visit the Dartmouth Phish Bowl!**

**A Current List of Reported Phishing Scams, Updated Weekly!**

