Finance & Admin Update

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

Chart of the Month

On-Campus Purchases on Dartmouth Credit Card

The Dartmouth Corporate Card or Procurement Card (PCard) should never be used for internal purchases. Instead, charges for internal Dartmouth services or events—such as those provided by Dartmouth Dining Services, Hanover Inn, Athletics, Hopkins Center, Hood Museum, the Dartmouth Computer Store, or Dartmouth-sponsored events (even when registering online) — must be directly charged to a chart string. This can be done through a journal entry, direct charging or by using a Department Charge Card. Following these practices prevent unnecessary banking fees for host departments and ensures responsible use of Dartmouth credit cards, as outlined in the Business Expense Policy, PCard Card Policy, and Corporate Card Program.

This month's chart represents the 755 on-campus charges that have been processed on Dartmouth credit cards this fiscal year.
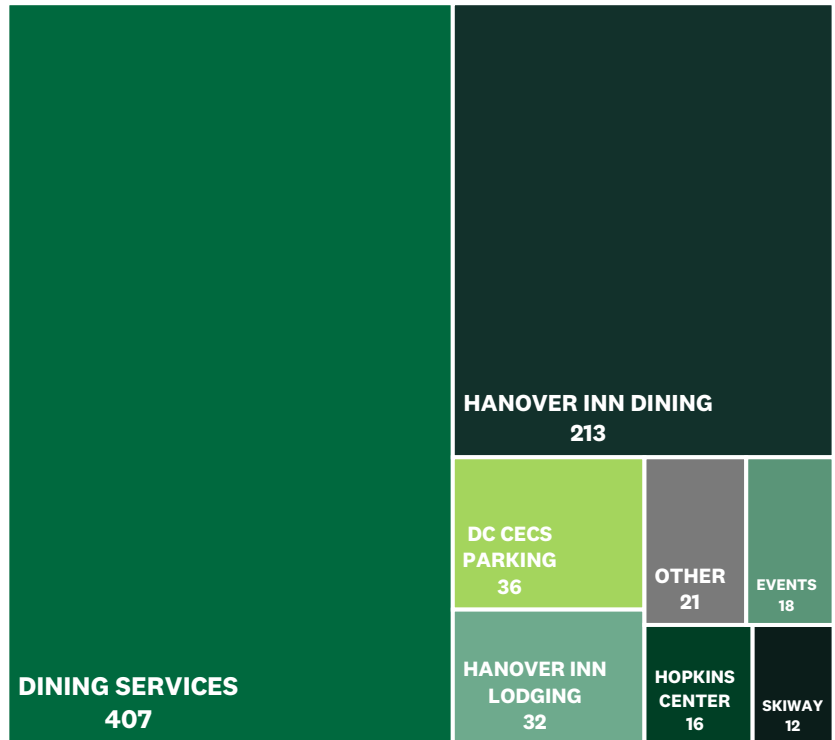
Source: Corporate Card & PCard IRA Reports, FY2025, 07/01/2024 – 2/28/2025 Transactions Counts

How to Make On-Campus Purchases:

- **Department Charge Card**: Use a Department Charge Card for Dartmouth Dining Services to allocate charges directly to specific chart strings. Departments may have multiple cards linked to various chart strings for precise allocation.
- **Direct Charge**: The Hanover Inn (for dining or lodging), the Computer Store, and other on-campus service providers accept direct chart string payments.
- **Journal Entry:** For events or collaborative activities, funds can be transferred between chart string accounts via journal entry.

If you have questions or need help determining the appropriate method for making an internal purchase, contact your Finance Center for assistance.

Join Us in Welcoming Back, Nariah Broadus!

Nariah Broadus has joined Human Resources as the new Senior HR Business Partner (HRBP) for the President's and Provost's Divisions. She will also serve as the HRBP for Finance. Nariah brings extensive experience in coaching managers and leaders in higher education and non-profits and facilitating leadership development programs across various industries. She will be a great asset to Dartmouth. Please join us in welcoming Nariah back to Dartmouth.

Spring Finance Information Forum

Mark your calendars for **Tuesday, April 22, 9:00 – 10:00AM** to attend our Spring Finance Information Forum. These forums provide updates on projects, process changes, deadlines, and more. As the Fiscal and Academic Year-end, and Commencement approaches, we will share important dates and deadlines to help you prepare.

👉Click here to register for this event.

Please note that May's Dartmouth Finance Collaborative will be canceled due to the timing of this forum.

Student Employee Appreciation Week

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

Student Employee Festival: Join us on Tuesday, April 15, from 3:00 –5:00PM in the Russo Atrium at the Hood Museum of Art. The first 50 student employees get a free gift, and all attendees can enter a raffle for amazing prizes.

Student Employee Essay Contest: Student employees can enter a $150 contest by describing how their job has influenced them academically, professionally, or personally.

Employer Appreciation Gifts: Employers are encouraged to celebrate their student workers with creative gestures like personalized thank-you notes, care packages, or even a pizza party. SEO is offering a 26oz Lone Pine imprinted alumninum water bottle for $4.00 per bottle gift item. Order online on a first-come, first-serve basis by Wednesday, April 9, 2025.

Let's come together to recognize and appreciate the vital role student employees play in our community! Visit the Student Employment's event page for more details!
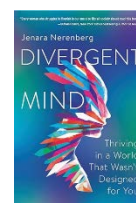
New Endowment System

New Endowment System – Finance is on target and continuing to progress on an upgrade from our existing endowment application Fundriver to Balance, Evertrue's endowment system application, scheduled to launch early spring of 2025. This upgrade represents a modern step forward from our existing platform, providing a fresher look and feel, enhanced features, improved performance, and a more intuitive user experience. We will be transitioning to Balance over the next couple of months and expect to be fully live for our March period ending financial close in mid- to late April. The team is currently developing a comprehensive training and support model to help our users get acquainted with the new Balance application with training dates in April and May. The team thanks you for your continued trust and partnership. We are confident that Balance will bring improved benefits and look forward to meeting our endowment management needs with this important upgrade.

Join the Diversity Reading Group

The 2025 Diversity Reading Group celebrates diverse voices and fosters meaningful conversations. Through curated readings, you will explore themes that deepen understanding and inspire growth. Whether you are a seasoned book lover or seeking new perspectives, this group offers a welcoming space to grow and connect.

Here's what's on the reading list for 2025:
- Divergent Mind: Thriving in a World That Wasn't Designed for You (March-May)
- On Juneteenth (June-August)
- Separating From Service: Mental Health Handbook for Transitioning Veterans (September-November)

Visit the Diversity Reading Group page to learn more.

Help People Pronounce Your Name

All Dartmouth staff and faculty can now easily **record and share how to pronounce their names. Simply follow** these basic instructions available on the HR website. It is straightforward and takes less than five minutes to complete. Once recorded, your name's audio file will be published in Dartmouth's official SSO-required directory making it accessible to your colleagues and peers.

Even better, you can add the pronunciation link to your email signature in Outlook or Gmail (guides provided by ITC), showcase it on your LinkedIn profile, or place it wherever you'd like to foster inclusivity and ease in communication.

Pro Tip: Speak slowly during the recording to ensure clarity.

Ready to start? Access the instructional guide here (pdf).

Dartmouth is a Beautiful Blend of Diversity With Unique Names From Around the Globe

Record Your Name Today to Ensure Your Entire Community Can Pronounce It Accurately

Follow This Link For More Info

Introducing Zoom Workplace: Elevate Your Virtual Collaboration

Dartmouth ITC unveiled Zoom Workplace, a new chapter in virtual engagement that launched on March 5, 2025. This enhanced platform brings a suite of powerful features designed to transform how Dartmouth faculty, staff, and students connect and collaborate. From hosting webinars with up to 1,000 attendees to leveraging AI-powered tools like meeting summaries, Zoom Workplace offers a seamless and dynamic experience.

Key highlights include the ability to schedule meetings effortlessly with Zoom Scheduler, access advanced collaboration tools like Zoom Whiteboard, and enjoy extended meeting durations of up to 30 hours. With these upgrades, Dartmouth users can look forward to a more efficient and engaging virtual environment. Ready to explore? Dive into the possibilities with Zoom Workplace today!
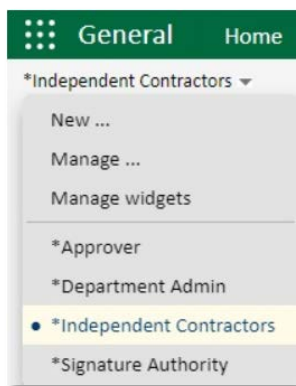
Reminder: Limited Engagements

A Limited Engagement is a short-term arrangement between Dartmouth and an independent contractor for one-time services. To qualify, the following criteria must be met:

- Services must exclude high-risk activities.
- Services are performed within the U.S. (excluding territories).
- Total annual payments to the contractor, including this engagement, cannot exceed $5,000.
- The contractor must not be a Dartmouth employee at the time of service.

Key Steps to Follow:

- Review the Hiring Independent Contractors & Guests webpage for guidance.
- Use the Independent Contractor Decision Tree to confirm eligibility and determine the process.
- Check the Independent Contractor Dashboard in Agiloft to ensure the contractor's agreements with Dartmouth stay within the $5,000 annual limit.

Adhering to these guidelines ensures compliance with institutional policies. For more details or support, visit the Hiring Independent Contractors & Guests webpage or reach out to Procurement Services.

Agiloft Financial Systems Access: Terminating or Transferring Employees

As a reminder, when offboarding, either for terminating employment or transferring employees to another department, it is important to submit Finance System Access requests to ensure that employees do not continue to have access to Dartmouth's Financial Systems. Our Financial Systems Access administrator does take an active role of monitoring terminated employees, but a good practice would be to submit the Personnel Authorization, through the General Request eForm or PASF, is to also submit a revised Financial Systems Access request with the effective date of the termination or transfer.

- To do this: Go to Agiloft at https://dartgo.org/agiloft.
- Select **New System Access** from the System Access dropdown on the ribbon
- When the new form opens, enter the employee's name or NetID, Employment Status, and enter an Access End Date.

- Then, in the Access Description section, select **End all access** radio button and provide a brief summary description
- Click the **Save draft and import** to pull the employees current access to the form
- Scroll to the bottom of the page, select an Approver
- Finally, click the **Submit** button from either the top or the bottom of the form

Go to Financial System Access Request Guidance for more details or email Financial.Systems.Access@dartmouth.edu.

Terminating a Contract Requester?

If you are terminating an individual who has submitted a Contract Request, send an email to Agiloft.Help@dartmouth.edu to have their contracts reassigned to a new requester. This will ensure renewal and expiration notifications are received by your department.

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, March 12, 9:00–10:00AM
- Wednesday, May 14, 9:00–10:00AM

Agiloft IRA Reports Training
- Wednesday, April 9, 9:00–10:00AM

Celebrate Excellence with Dartmouth's Social Justice Awards!

The Social Justice Awards (SJAs) nomination process is now open! This is your chance to recognize remarkable individuals who are making a meaningful impact on campus and beyond. Whether it's a student, faculty member, staff, or alumni, the SJAs honor those who actively champion diversity, equity, and inclusion in their communities.

Nominations are due by Friday, March 21, and full details about each award category can be found on the Social Justice Awards website. If someone comes to mind, use the official nomination form to submit their name. Share the recognition and appreciation—help us celebrate the changemakers among us!

The awards are given in the following six categories:

- **Emerging Leadership** honors an individual who has served less than 10 years in their chosen field of work or is a recent graduate.
- **Ongoing Commitment** honors an individual who has served between 10 and 20 years in their chosen field of work.
- **Lifetime Achievement** honors an individual who has dedicated more than 20 years to their chosen field.
- **Student Organization** honors a student group(s), composed of current students or alumni, for their commitment to promoting social justice in our community and beyond. (Note that to be eligible for this award, current student organizations must (A) be a Dartmouth-sponsored/supported group OR (B) have an active presence on the Dartmouth campus.)

Spread the word by displaying the below graphic on monitors, in newsletters, or around your office space. Let's come together to spotlight and honor those who make Dartmouth a better, more inclusive place.

DARTMOUTH WORK TRAVEL
PROTECT YOUR TECH

BEFORE Traveling

SCREEN LOCK
Set an auto-timed screen lock with a strong password on all devices with work data, including email.

UPDATE OS AND APPS
Ensure all operating systems and apps on your devices are up to date before you travel.

ANTI-VIRUS SOFTWARE
Install or enable Dartmouth-approved anti-virus software.

BACKUP BEFORE TRAVEL
Back up essential data and information prior to travel.

ENABLE "FIND MY DEVICE"
This not only helps locate the missing device but will allow you to disable and wipe if necessary.

KNOW THE LAW
If traveling outside of The United States, know the data security laws.

WHILE Traveling

AUTHORIZED DEVICES
When traveling for Dartmouth use only authorized devices for all work.

NO PUBLIC DEVICES
Never use public devices, such as hotel or library computers for work.

USE ENCRYPTION
Use Outlook TLS to encrypt emails in transit. Use HTTPS for secure browsing. Know the country's law for encryption.

AVOID PUBLIC WI-FI
Use private password required WiFi when possible.

USE DARTMOUTH VPN
Use the VPN when accessing sensitive Dartmouth data.

ACCESS
Disable Wi-Fi/Bluetooth access on all devices when not using. Don't allow anyone to connect to your device through USB.

HELP REPORT LOST OR STOLEN DEVICES IMMEDIATELY

- Send an email to Information.Security@dartmouth.edu
- Submit a ticket -select "Equipment Theft or Loss" as Incident Type.
- Scan QR Code for KBA on this important topic.