What's New . . .

January 2024

Business Managers' Meetings

The next Business Managers' Meeting is scheduled for March 7, 2024.

If you would like to present at a future Business Manager Meeting or have suggestions for helpful content, contact: Heather Kotsybar. We would love to hear about best practices in your area, which may also help others.

Controller's Office

Welcome Jessica O'Brien!

She has joined SLU as Janet Strader's successor in the Director of Budget role. Janet Strader will be retiring in early February after almost 14 years of wonderful service at SLU. (Many thanks to Janet!!!!!)

Most recently, Jessica came to SLU from a public company in St. Louis where she served as Director of Accounting and Financial Planning. Jessica is a CPA and, before her last role, Jessica spent many years in accounting at another publicly traded company and a public accounting firm. Jessica will be training with Janet over the coming weeks. Please welcome Jessica to SLU!

Welcome Tiffani Williams to Business & Finance!

Tiffani is joining us as an Accountant III on the Controller's team. Tiffani will be involved with various financial reporting, account reconciliation, 990 tax returns, and more…

Tiffany has over 8 years of experience in progressive accounting roles and holds a Bachelor of Science and Master's degree in Accounting.

We're excited to see Tiffani apply her experience and education to help grow the department and university!

Please welcome Tiffani to SLU!

Business Service

Fisher Scientific – New GPO Pricing Contract

Business Services has contracted with Omnia GPO for a new pricing agreement that will enhance pricing for the Fisher Scientific products purchased by the university. The new pricing was implemented in November.

Airgas Service Delivery Update

Airgas service and delivery issues have improved. Airgas is now fully staffed with drivers and deliveries are running smoothly. Any backorder issues are a result of lead time on products. We still recommend placing orders well in advance as lead times often change. For lead time information or other service issues, please reach out to our new Airgas rep, Shannon Hicks, at shannon.hicks@airgas.com and copy Mary Lynn Thompson at marylynn.thompson@slu.edu.

New Contract Management and Signature Authority Policies

Revisions to the Contract Management Policy and Signature Authority Policy were recently approved by University leadership. Links to the updated policies can be found here:

- Contract Management Policy
- Signature Authority Policy

These policies establish the process for reviewing contracts on behalf of the University to ensure that all approvals required by University policies are obtained prior to execution. The policies also ensure that the contract is signed by a University representative with the requisite authority to sign contracts. Please reach out to Ellen Borowiak (ellen.borowiak@slu.edu) with any questions.

Integrated DNA Technologies Price Increase in Early 2024

Integrated DNA Technologies has informed us that a price increase will take effect on January 19th, 2024. They recommend that Buyers place any pending orders as soon as possible to take advantage of the current 2023 list prices where applicable.

For product pricing specifics, please refer to www.idtdna.com or email custcare@idtdna.com. IDT also has a punchout in Billiken Buy.

Central Processing Center
CPC-Central Processing Center Reminders

Upcoming Concur Expense Report training sessions:
January 16, 2024, Tuesday   10:00 am
February 21, 2024, Wednesday   10:00 am
March 12, 2024, Tuesday   10:00 am

Register via Workday>Learning

Travel Reminders:

Conference travel -- When traveling to a conference, rooms should be booked at the lowest published conference room rate for reimbursement per travel policy. Published conference date and destination documentation and conference hotel and room rate documentation must be attached to the expense report for reimbursement. You should be capturing and saving this information off the conference website in advance so that you have it to submit on your expense report.

Hotel folios should be submitted with the expense report backup.

When creating expense reports, pay attention to the system alerts in Concur which remind you of the necessary steps or needed documents for backup attachments.

All travel reimbursement requires a Trip ID#, obtained in Workday>Request>Trip ID.

Familiarize yourself with SLU travel policy via the following link:
https://www.slu.edu/business-finance/departments-and-offices/central-processing-center/travel/travel-policies.php

Accounts Payable Reminders:

When an actual invoice # does not exist on the invoice/backup documentation,
please remember to use the date format of '01012024' as the invoice #.

Direct deposit ACH is the University's preferred and required payment form.
A completed vendor direct deposit/ACH authorization form should be submitted
with a new supplier request in Workday.

Human Resources

2023 Evaluations

In the New Year, we are aiming to have all employee self-evaluations complet
deadline. All eligible employees who have not completed their self-evaluations should work toward
completing them. You can view a recent webinar on self-evaluation [here](#).

For new managers or for those who would like a refresher we will be holding a webinar on how to complete
the manager portion of the evaluation and tips on how to have a good performance review conversation on
January 25th at 9:30 am. To register for this event please click [here](#).

A common question we are receiving is regarding old goals showing up on the evaluation form and the
new goals are not there. This is typically due to old goals not being archived and new goals uploaded by
the manager in the Team Performance app in Workday. Please note, however, that during the
performance review period, these functions are locked and you will not be able to complete those tasks
until after the review time has been completed. Goals can be removed, added, and edited on the
evaluation form to accurately reflect 2023, but that editing does not update the goals in Workday. Thank
you.

You may also email training@slu.edu with any questions.

Workday Financials

Questions or issues with Workday Financials? Contact wdfinance@slu.edu

Workday Announcements:

The following Customer Invoice types have been marked with **DNU (Do Not Use)**:
SLUCare
SSM SLUCare

Workday Accounting Structure Updates:

New Internal Service Providers:

CTO Research Services

WATER Institute

New Revenue Category:

Miscellaneous Invoice Revenue - posts to Ledger Account 4500: Other Sources

New Spend Category:

WATER Institute Charges – posts to Ledger Account 5120: Inter-Departmental Services

Workday Report Updates and Additions:

As a reminder, you may not have access to certain Workday Reports due to security. Please email wdfinance@slu.edu with any questions.

Report Name	Update/Description	Functional Area
Data Audit – Awards	The Data Audit – Awards report has been updated with a new column: Assistance Listing Number (ALN)	This report is available to the following Security Groups: Accounting Manager, Award Analyst, Award Approver, Award Billing Specialist, Award Contract Analyst and Specialist, Award Task Analyst, Conflict of Interest Approver, Cost Center Approver, Cost Center Financial Analyst and Manager, Director of Sponsored Programs, Finance Admin, Finance Analyst, Finance Executive, Fund Manager, Gift Financial Analyst and Manger, Grant Approver, Grant Financial Analyst, Grant Manager, Grant Approver, Principal Investigator, Pre-Award Specialist, Program Financial Analyst and Manager, Project Financial Analyst and Manager, Sponsored Programs Manager, University Commitment Office.

CR – FIN Budget vs Actual – Awards/Grants by Grant	CR – FIN Budget vs Actual – Awards/Grant by Grant has been updated with the following note: *Please use Fiscal Time Period >> Last 60 Periods to get Grant Life to Date results * Selection of Award Time Period will produce invalid results	This report is available to the following Security Groups: Award Analyst, Award Contract Analyst, Award Specialist, Award Tast Analyst, COI Approver, Controller, Cost Center Approver, Cost Center Financial Analyst, Cost Center Manager, Finance Auditor, Finance Organization Admin, Function Financial Analyst, Fund 32 Grant Manager, Fund Financial Analyst, Fund Manager, Gift Financial Analyst, Gift Manager, Grant Approver, Grant Financial Analyst, Grant Manager, Lead Principal Investigator, Manager, Payroll Partner, Pre-Award Specialist, Program Financial Analyst, Program Manager, Project Financial Analyst, Project Manager, Specialty Financial Analyst, Sponsored Programs Manager, University Commitment Office.

CR – FIN Budget vs Actual – Awards/Grants Summary	CR – FIN Budget vs Actual – Awards/Grant Summary has been updated with the following note: *Please use Fiscal Time Period >> Last 60 Periods to get Grant Life to Date results * Selection of Award Time Period will produce invalid results	This report is available to the following Security Groups: Award Analyst, Award Contract Analyst, Award Specialist, Award Tast Analyst, COI Approver, Controller, Cost Center Approver, Cost Center Financial Analyst, Cost Center Manager, Finance Auditor, Finance Organization Admin, Function Financial Analyst, Fund 32 Grant Manager, Fund Financial Analyst, Fund Manager, Gift Financial Analyst, Gift Manager, Grant Approver, Grant Financial Analyst, Grant Manager, Lead Principal Investigator, Manager, Payroll Partner, Pre-Award Specialist, Program Financial Analyst, Program Manager, Project Financial Analyst, Project Manager, Specialty Financial Analyst, Sponsored Programs Manager, University Commitment Office.

Office of University Compliance & Ethics

The Saint Louis University Integrity Hotline is available as a confidential, toll-free resource for anyone with a concern regarding business, billing, and/or ethical practices in his or her department. Anonymous or self-identified reports of any nature can be made to the Integrity Hotline at **1-877-525-5669**. Additional information and FAQs regarding the Integrity Hotline can be found on the Office of University Compliance and Ethics homepage: https://www.slu.edu/compliance-ethics/hotline.php