

General Accounting



From the Desk of the VP Finance and Support Services:

We are drawing closer to the end of another fiscal/academic year. King's has managed through the pandemic to this point by being as flexible as possible in all aspects of its operations. This has required an enormous amount of time, effort, skill and energy on the part of all King's employee groups for which everyone should be proud. Unfortunately, it looks like this level of flexibility is going to be required for a while yet as COVID does not appear to be subsiding. Thank you in advance for your work as you plan for summer and fall terms to come.

King's is in the midst of significant leadership transition as we look to hire two VP level positions. These roles will help shape the future of King's and I encourage everyone to participate as much as possible in the processes. In the interim, please know that the remaining executive and senior administrators are working to fill any gaps to the best of their abilities. Your patience and understanding is much appreciated as we transition through these changes.

The following sections outline several finance department processes and deadlines that will assist the Finance team to ensure your needs are met in a timely and efficient manner. Please have a read through the applicable sections.

I wish everyone a healthy spring and Easter season and look forward to the coming challenges and opportunities.

Jeff Major
Vice President, Finance and Support Services

Mission Statement

THE FINANCE DEPARTMENT IS COMMITTED
IN OUR EFFORTS TO ADMINISTER POLICY
AND BE A VITAL RESOURCE FOR
ACCURATE INFORMATION TO ALL
MEMBERS OF KING'S UNIVERSITY
COLLEGE

Research Grants

FOR MORE INFORMATION
CONTACT:

VISHAL KOTHARI (x4375),
MANAGER OF FINANCIAL ANALYSIS AND
REPORTING

PHYLLIS FIDLER (x4318),
MANAGER OF ACCOUNTING & FINANCIAL
INFORMATION SYSTEMS

King's Internal and External Research Grant recipients should ensure that funds are utilized for the purpose of which they are awarded. Reimbursement requests submissions will be verified for compliance by applying King's and the granting agency's policies and guidelines.

All **Internal Grants** must be spent by **April 30th** and receipts have to be submitted to the Finance Office by **May 2, 2022**.

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Research Grants (*continued*)

External Research Grant (i.e. SSHRC, CIHR or transfer agreement) holders have a **March 31st** deadline. Receipts submitted for these grants must be dated before March 31st, 2022 and received by Finance no later than **April 8th, 2022**.

If you have any questions related to your Internal or External Research grant, please contact Vishal Kothari, Manager - Financial Analysis and Reporting via email at vishal.kothari@kings.uwo.ca.

Purchasing & Central Services

Central Services

In preparation for the coming exam period, all exam submissions must be sent to Central Services through the Exam Submission System (ESS) a minimum of seven (7) days prior to your exam date. If you send your exam to us by email, we will reply asking you to re-submit using the ESS. If you need help with accessing or using the ESS, your Administrative Assistants can help. To ensure proper formatting, the ESS only accepts files in pdf format, if you need help creating a pdf file please contact ITS. As always, printed exams can be picked up in Enrolment Services 30-minutes before the exam time along with scantrons, exam booklets, nominal rolls and washroom sign-out sheets.

FOR MORE INFORMATION
CONTACT:

TIFFANY CHISHOLM (x4314),
PURCHASING SERVICES COORDINATOR

JASON BROCK (x4372),
CENTRAL SERVICES ASSISTANT

WENDY SCANLAN (x4315),
CENTRAL SERVICES ASSISTANT

Our 2021 goal was to be *more accurate and consistent than ever before* when it came to sorting College mail. We launched our Address Correction Label program, modelled after Canada Post, to fix address label issues that would potentially result in incorrectly sorted mail or important mail accidentally being return-to-sender (RTS). Thank-you to everyone who paid attention to the bright pink labels and contacted senders to make corrections. As we are all returning to campus and letter mail is a more regular part of our daily lives, we are going to continue with the Address Correction Label program this year. If you see a bright pink label, please don't ignore it. Next year, Central Services will be updating our RTS policy with more strict guidelines, so any corrections that are made now will reduce issues next year. Thanks in advance.

Purchasing

As the new fiscal year approaches (May 1st), many depts have plans for allocating purchases between fiscal year budgets (current or new). This does get a little tricky, but the rule is that if you want to use the current year budget, then you need to order your items in time to get them shipped/received before April 30th. If you miss this deadline, your purchase will automatically come out of next year's budget. If you don't have room in next year's budget for this item, then you will need to arrange to return it. Be sure to plan ahead and leave time for unexpected delays, especially with the many supply chain issues resulting from Covid-19. If you are planning to use next year's budget on a purchase request submitted before May 1st, please include this information as it will make the yearend cleanup easier.

Also, as new budget funds come available, if you are planning to spend over \$10,000 on a single item/service please be sure to check the Purchasing Policy (found on the Purchasing webpage: www.kings.uwo.ca/about-kings/facts-and-information/administrative-departments/finance/purchasing) and follow the correct process (e.g. 3 verbal quotes, 3 written quotes, RFP, etc.). If you have any questions about the Purchasing Policy, contact Tiffany Chisholm at purchasing@kings.uwo.ca.

Conference Services

FOR MORE INFORMATION
CONTACT:

AMANADA FINLAYSON (x4452)
CONFERENCES SERVICES COORDINATOR

If you are looking to book a future Event or Conference, please email Amanda Finlayson in Conference Services to make it an easy process:
ConferenceServices@kings.uwo.ca

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Accounts Payable (A/P)

Important Year-End Date – All expense/reimbursement claims must be emailed to Accounts Payable by Monday May 2nd, 2022 (April 30th falls on a weekend) to qualify for reimbursement.

Professional Development Funds (PDF):

All purchases pertaining to the 2021-2022 fiscal year's Professional Development Fund must be shipped or received (for goods) before April 30th, 2022 to be reimbursed. Also, any travel and conference to be paid out of PDF must occur before April 30th to be reimbursed out of the current budget. All submissions with receipts and/or proof of payment must be received by Accounts Payable before end of day **Monday May 2nd, 2022** to be reimbursed. The Employee Expense Reimbursement Request Form is to be used to submit all Employee Expense claims.

FOR MORE INFORMATION

CONTACT:

ANGELA BRODT (x4311),
ACCOUNTS PAYABLE COORDINATOR

Travel and Conference:

The King's Travel Policy is posted online for review: <https://www.kings.uwo.ca/about-kings/who-we-are/administrative-departments/finance/accounts-payable/>

Prior to travel, please complete the Academic Dean's Presenters Travel and Conference Fund Request located on the Accounts Payable web page. Upon return, submit all relevant expenses directly to Accounts Payable with the Academic Dean's Presenters Travel and Conference Fund Approval Form. If there is a large discrepancy between the pre-approval amount and the final expense, the claim will be resubmitted for the Dean's approval prior to reimbursement.

Please take the time to read over the policy prior to travel and submission of expenses. Please pay particular attention to the limits and restrictions that are applied to meal expenses while traveling.

Accounts Payable is happy to answer any pre-travel questions or concerns you may have regarding the guidelines provided in the policy. All Employee PDF and Conference Fund reimbursements are to be submitted using the Employee Expense Reimbursement Request Form or the Employee Center Expense Claim Process.

*Travel by personal car - The CRA kilometer allowance is currently .55/km. Travel by private vehicle is to be used for short journeys (less than 500km round trip) where this constitutes the most economical and effective means of transportation.

If you are out of country April 30th - May 2nd, the claim will need to be scanned prior to the due date to kucap@kings.uwo.ca to be eligible for reimbursement.

Invoice Department Expenses:

It is recommended that you place your final order for supplies at least a week prior to April 30th to avoid the late delivery of items. If an item does not ship until May 1st but you ordered it on April 25th, the item will be expensed in the next fiscal.

Department Invoices for the 2021-2022 budget year will be processed as accruals if the item was shipped or the service were performed prior to April 30th. The accruals will be completed only for a short period into May. Items which have been received but not invoiced must have a completed Purchase Order on record by April 30th to be included in this year's budget. It is strongly advisable to arrange a Purchase Order when placing orders close to year-end. All items purchased must be on-site by April 30th to qualify for the 2021-2022. Goods and services that pertain to the period after April 30th will be recorded as the next fiscal year's expense.

*Please ensure you are downloading the most up-to-date forms from the Accounts Payable web page. Forms are updated frequently to fit policy changes and improve user experience.

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Payroll and Benefits

General Payroll Due Dates:

Final submission for all 2021-22 electronic hourly timesheets will be **Wednesday, May 11th, 2022**. Any submissions after this date will require a new 2022-23 contract and will be processed in the new budget year.

Please ensure all hours have been electronically submitted on a timely basis through the Time Entry System!

New contracts for 2022-23 can be submitted online during the month of April. Instructions for completing the Timesheet Contract can be found at the link below: <https://www.kings.uwo.ca/about-kings/facts-and-information/administrative-departments/finance/payroll-benefits/>

Please ensure all information is completed on the contract. If the person is new to Kings, they will need to upload tax forms and a copy of their void cheque with their contract. Payroll will send the employee an email once the contract is activated (May 1st, 2022 or later). The employee can electronically enter hours effective from their start date through the Employee Web App (EWA) website.

MANULIFE BENEFIT
INQUIRIES?

CONTACT DIRECTLY AT
1.800.268.6195

SUNLIFE RRSP
INQUIRIES?

CONTACT DIRECTLY AT
1.866.733.8613

All Staff OT to be paid must be submitted no later than **Monday, April 25th, 2022** for the April 28th, 2022 payroll.

T4's are available for download on the Employee Web App (EWA). If you have any problems accessing your T4 online, please contact Payroll via email at: payroll@kings.uwo.ca

Information was sent out at the beginning of the year regarding the extension of and increase for Work From Home Expenses. Please use the tools provided on the CRA website to calculate any possible claims for your tax returns.

Sun Life Financial: RRSP plan members can access original copies of their RRSP receipts from the Tax Slips & RRSP Info page on www.mysunlife.ca. Copies will be clearly marked as DUPLICATE and if the plan members have Adobe Acrobat Reader on their computer, they can print and use them to prepare their personal tax returns.

Free Financial Wellness Webinars: These free webinars hosted by qualified and licensed professionals at Sun Life are designed to increase financial literacy to help you reach your financial and retirement savings goals. Register at <https://www.sunlife.ca/en/campaign/financial-wellness-webinars/>

2021 Pension Statements:

The 2021 Pension Statements are expected to be ready by mid-April. A communication will be sent out once received. Please review your statement carefully and contact [Kate Maars](#) in the Payroll Department with any questions or updates to personal information.

As a reminder, please update the Payroll Department as soon as possible if any of the following changes occur: *Name Change* (must provide documentation as proof of change such as marriage certificate, certificate of name change, etc.), *Address Change*, *Beneficiary Updates for your RRSP*, Pension, Group Life or *Adding/Removing/Updating dependents on your benefits*.

FOR MORE PAYROLL INFORMATION CONTACT:

KATE MAARS (x4418),

IZABELA MATKOWSKI (x4341),

PAYROLL & BENEFITS MANAGER

PAYROLL & BENEFITS ASSISTANT

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Accounts Receivable / Student Financial Services

Please refer to the Student Financial Services online site for the most up-to-date information regarding on-campus hours and services: <https://www.kings.uwo.ca/about-kings/facts-and-information/administrative-departments/finance/sfs/> We can also be reached via email at: studentfinance@kings.uwo.ca or by calling 519-433-3491 ext. 4319 between 9:00am – 4:30pm, Monday to Friday (excluding holidays).

Tax Forms for Students:

T202: Official Income Tax Receipts are issued to all students for tuition and eligible ancillary fees paid during the calendar year. This form will represent the amount of tuition and fees that can be claimed, as well as the number of months students are enrolled. The 2021 form is available online: <http://student.uwo.ca>.

T4A: Tax receipts are issued for one of the following: scholarships or grants issued by King's, scholarships from external organizations issued to King's for a student, tuition benefit scholarships, bursaries or other monetary awards. The 2021 slips were made available online to students through www.kucapplications.ca. Non-Student T4A's were mailed to the home address on file. Should a duplicate copy be needed, please contact Kellie Knechtel at Kellie.Knechtel@kings.uwo.ca.

T4: Employed students (Work Study, First Generation Working Program, I.W.E) will receive a T4 from our Payroll and Benefits office for tax purposes. Should a duplicate copy be needed, please contact Payroll at payroll@kings.uwo.ca.

Summer Student Employment at King's:

Student Financial Services posted a total of 52 Summer Employment Opportunities for students; 42 Work Study positions for domestic students and 10 IWE positions for international students. Approved applications will be forwarded to supervisors shortly.

FOR MORE INFORMATION CONTACT:

SHELLY GUERIN (x4410),
STUDENT FINANCIAL SERVICES OFFICER

KELLIE KNECHTEL (x4403),
ASSISTANT STUDENT FINANCIAL SERVICES OFFICER

VANESSA FORTIER(x4317),
STUDENT FINANCIAL SERVICES CLERK

CORAL ROBINSON (x4701),
STUDENT FINANCIAL SERVICES CLERK

AMBER PATRICK (x4355),
STUDENT FINANCIAL AID COORDINATOR

Employee Centre - Expenses

FOR FURTHER INFORMATION & TO UPDATE YOUR EMPLOYEE CENTRE ACCESS, CONTACT:

PHYLLIS FIDLER (x4318),
MANAGER OF ACCOUNTING & FINANCIAL INFORMATION SYSTEMS

The employee center is available for all employees to submit expense claims for employee negotiated funding such as, Internal Research Grant, Presenter Fund (Conference), Professional Development Fund (PDF), Teaching Resource Fund (TRF) and Wellness fund depending on your association/union agreement.

****Please note, multiple items can be input on one expense claim. You do not need to enter each item on a separate claim.**

Faculty/Staff/PAO:

If you are uploading receipts as scanned docs:

1. Enter claim information on the system.
2. Upload ALL receipts.

If you are unable to upload your receipts:

1. Enter claim information on the system.
2. Enter Employee note: "Sending hardcopy to AP".
3. Email [receipts and claim form](mailto:receipts_and_claim_form@kucap@kings.uwo.ca) to kucap@kings.uwo.ca
4. Don't forget to SUBMIT the claim.



King's Employee Center