

General Accounting

From the Desk of the VP Finance and Support Services:



As we close out the fiscal and academic '22-'23 year we should recognize the vast effort that has allowed us to get to this point successfully. King's has undergone a significant leadership transition in the last 12 months with the hiring of new directors in HR, ITS, and EDI, a new VP External, the appointment of an interim dean and new positions in the President's office. Much work is still to be done both with hiring to come in the Foundation ED role as well as a new Provost/VPA followed then by the integration of new people and ideas into King's structures. This level of change is both challenging and energizing. With the focus moving towards the next Strategic Plan, the timing of the transitions in key leadership will allow new ideas to be integrated into King's future plans.

The Finance team has been working towards the conversion of our existing Financial and Human Resource Information Systems. This large scale project will be wrapping up in May. Please review notifications for timing of the transition to our new system. Your patience is appreciated as we work with our outside consultants and internal ITS group to ensure as smooth a transition as possible.

On **April 14th at 10AM in the Wemple, Vitali Lounge**, I will be presenting a Pension Plan Review Seminar and I welcome and encourage all new and existing Pension Plan Members to attend.

As noted above, we are approaching the end of the fiscal year and the following sections outline several finance department processes and deadlines that will assist the Finance team and ensure your needs are met in a timely and efficient manner. Please have a read through the applicable sections.

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

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



Jeff Major
Vice President, Finance and Support Services

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 and for the applicable time period. 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 are due to be submitted to the Finance Office by **May 1, 2023**.

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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, 2023 and received by Finance no later than **April 7th, 2023**.

Any questions related to Research grant applications, transfer agreements and administering of Tri-agency funds should be directed to Research@kings.uwo.ca whereas queries related to reimbursement of Research expenses should be directed to ResearchFinance@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 Academic Department 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. Also, a friendly reminder that all accommodated exams must be sent to UWO's Exam Central for printing.

FOR MORE INFORMATION
CONTACT:

TIFFANY CHISHOLM (x4314),
PURCHASING SERVICES COORDINATOR

JASON BROCK (x4372),
CENTRAL SERVICES ASSISTANT

WENDY SCANLAN (x4315),
CENTRAL SERVICES ASSISTANT

Completed scantrons can be dropped off at Central Services for drop-off and pickup at UWO. Scantron forms are available in Central Services or can be found on UWO scantron webpage [here](#). Any scantrons dropped off at UWO by a Faculty, must also be picked up by that Faculty, unless a special request is made to printing@kings.uwo.ca. Once scantrons have been processed by UWO and delivered back to Central Services, you will receive an email notification from printing@kings.uwo.ca indicating that your scantrons have been placed in the intercampus mail to your mailbox. Please allow 24 hours for your scantrons to get to your mailbox. For any questions on how to complete scantrons or how to use the scantron file, please check the UWO scantron webpage [here](#) and/or contact the scantron office at UWO.

Purchasing

As the new fiscal year approaches (May 1st), many departments have plans for allocating purchases between fiscal year budgets (current or new). The general 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 then 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, if possible. Be sure to plan ahead and leave time for unexpected delays, especially with many supply chain issues still impacting deliveries. 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 then 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.). For further information about the Purchasing Policy, contact Tiffany Chisholm at purchasing@kings.uwo.ca.

Conference Services

FOR MORE INFORMATION
CONTACT:

AMANADA FINLAYSON (x4452)
CONFERENCES SERVICES COORDINATOR

Please email Amanda Finlayson in Conference Services to book a future Event or Conference at 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 1st, 2023 (April 30th falls on a weekend) to qualify for reimbursement.

Professional Development Funds (PDF):

All purchases pertaining to the 2022-2023 fiscal year's Professional Development Fund must be shipped or received (for goods) before April 30th, 2023 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 1st, 2023** to be reimbursed.

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 .62/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 1st, 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 several weeks prior to April.30th to avoid the late delivery of items. An item that does not ship until May 1st will be expensed in the next fiscal.

Department Invoices for the 2022-2023 budget year will be processed as accruals if the item was shipped or the service was 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 2022-2023. 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:

Payroll is migrating to a new cloud-based system in May! During the Spring months please expect longer than usual response times to inquiries as we transition over to the new system.

PLEASE NOTE: Payroll dates will remain the same.

Hourly Payroll: Hourly employees will not be able to submit timesheets between May 6th – 12th as this is a block out period with the new system migration. Time worked between the 6th – 12th can be submitted the following week when timesheets reopen on May 13th.

Final submission for all 2022-23 electronic hourly timesheets will be **Wednesday, May 3rd, 2023**. Any submissions after this date will require a new 2023-24 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!

MANULIFE BENEFIT
INQUIRIES?

CONTACT DIRECTLY AT
1.800.268.6195

SUNLIFE RRSP
INQUIRIES?

CONTACT DIRECTLY AT
1.866.733.8613

New contracts for 2023-24 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, 2023 or later). The employee can electronically enter hours effective from their start date through the Employee Web App - EWA website.

Staff Payroll: All Staff OT to be paid must be submitted no later than **Monday, April 24th, 2023** for the April 27th, 2023 payroll. All accumulated **Time In Lieu** will be paid out at the end of April if not taken before then.

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

PSSD: The Public Sector Salary Disclosure Online Reporting will be published at the end of March.

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/>

2022 Pension Statements: The 2022 Pension Statements are expected to be ready by mid-late April. Statements will once again be emailed to each individual on pension. 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:

1. *Name Change* (must provide documentation as proof of change such as marriage certificate, certificate of name change, etc.)
2. *Address Change*
3. *Beneficiary Updates for your RRSP, Pension, Group Life*
4. *Adding/Removing/Updating dependents on your benefits.*

FOR MORE PAYROLL INFORMATION CONTACT:

KATE MAARS (x4418),

PAYROLL & BENEFITS MANAGER

NICOLE KOYANAGI,

PAYROLL & BENEFITS COORDINATOR

IZABELA MATKOWSKI (x4341),

PAYROLL & BENEFITS ASSISTANT

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Accounts Receivable / Student Financial Services

Student Financial Services can 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 2022 form will be 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 2022 slips will be made available online to students through www.kucapplications.ca. Non-Student T4A's will be 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 and I.W.E) will receive a T4 for their 2022 employment income earned through King's University College. The Payroll and Benefits office has posted these online on the King's Employee Centre. Please check your email for information and instructions. Should you have any questions, please contact Payroll at payroll@kings.uwo.ca.

Summer Student Employment at King's:

Student Financial Services posted a total of 57 Summer Employment Opportunities for students; 46 Work Study positions for domestic students and 11 IWE positions for international students. Approved applications will be forwarded to supervisors in April, after the application deadlines have passed.

Summer Tuition:

Summer tuition fees are expected to be posted to online in April. Please check the King's website for the most up to date fee information; [Fees and Responsibilities - King's University College \(uwo.ca\)](https://www.kings.uwo.ca/fees-responsibilities).

Summer OSAP:

The 2022-23 Summer Supplemental OSAP Application will be posted online by March 1st. Please check the King's website for the most up to date information; [Ontario Student Assistance Program \(OSAP\) - King's University College \(uwo.ca\)](https://www.kings.uwo.ca/osap).

Sparkrock 365 Migration

FOR FURTHER INFORMATION:

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

We are transitioning to a new cloud-based system for Finance and Human Resources in early May 2023.

Sparkrock 365 will be replacing Dynamics 2016 and the online "King's Employee Center" portal. You may not notice a big change in functionality, but there is a new look and URL - You'll find the updated link on MyKings.ca starting in early May.

Click here for more information <http://www.kings.uwo.ca/its/support/sparkrock365/>

FOR MORE INFORMATION CONTACT:

SHELLY GUERIN (x4410),
STUDENT FINANCIAL
SERVICES OFFICER

NATALIE WALZAK (x4403),
STUDENT FINANCIAL AID COORDINATOR

AMBER PATRICK (x4355),
STUDENT FINANCIAL AID COORDINATOR

KELLIE KNECHTEL
ASSISTANT STUDENT FINANCIAL
SERVICES OFFICER

CORAL ROBINSON (x4701),
STUDENT FINANCIAL SERVICES CLERK