

General Accounting

From the Desk of the VP Finance and Support Services:



As we head into the final stages of this fiscal year there are the regular logistics noted in the sections below that require both your attention and that of the Finance Team. Please review the applicable sections so that we can ensure a smooth conclusion of this fiscal year and/or preparation for the next.

In addition to the numerous processes noted below, King's is in the process of several reviews, surveys, planning exercises and structural revisions. The federal and provincial levels of government are putting various obstacles in our way on a seemingly daily basis. We are in negotiations (or have concluded negotiations) with all four of our employee groups this year. Our affiliation agreement with Western and the other affiliates expires this year and we are currently working on a King's – Western agreement to reflect a "King's-centric" agreement. The Finance Team is working to support these projects in many ways; assistance with RFP review for external advisors; reviews and monitoring of legislative changes related to grants, tuition, purchasing policies; providing data for negotiations (internal and external); data and queries from the Board of Directors both for and between meetings; as well as budgeting and planning for the future.

While the immediate future may be a bit more constrained, due primarily to the external forces at play, King's and the Finance Team will continue to work to ensure the infrastructures are in place so that we can continue to fulfill our stated mission.

Thank you for your continued support and cooperation as we work through these issues together.

All the best for the remainder of this term.



Jeff Major, CA CPA
Vice-President, Finance & Support Services

Mission Statement

THE FINANCE DEPARTMENT PROVIDES VALUE-ADDED INFORMATION AND SERVICES IN AN EQUITABLE AND TRANSPARENT MANNER TO ALL MEMBERS OF KING'S COMMUNITY. THE FINANCE TEAM WILL TAKE A LEADERSHIP ROLE IN ALL STRATEGIC PLANNING AND THE DEVELOPMENT OF ADMINISTRATIVE POLICY AND PROCESSES.

Research Grants

FOR MORE INFORMATION CONTACT:

VISHAL KOTHARI
ASSOCIATE DIRECTOR OF FINANCE

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.

Reimbursement requests should be sent to the Research Office or via email to Research@kings.uwo.ca for ADO's review and approval purposes.

All **Internal Grants** must be spent by **April 30th** and receipts are due to be submitted to the Finance Office by end of day on **May 1, 2024**.

The General Ledger

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, 2024 and received by Finance no later than **April 5th, 2024**.

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/gradescopes, 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
PURCHASING SERVICES COORDINATOR

JASON BROCK
CENTRAL SERVICES ASSISTANT

WENDY SCANLAN
CENTRAL SERVICES ASSISTANT

Although the university is moving towards Gradescope grading sheets, Western continues to support scantron services. 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 member, must also be picked up by that Faculty member, 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. 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.

The Purchasing Policy was updated in November 2023 and you can find it [here](#). Procurement thresholds have changed, so be sure to take a look. Any questions/concerns about the Purchasing Policy, contact Tiffany Chisholm at purchasing@kings.uwo.ca.

Conference Services

FOR MORE INFORMATION
CONTACT:

AMANADA FINLAYSON
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 Tuesday April.30th 2024 to qualify for reimbursement.

Professional Development Funds (PDF)/Teaching Resource Funds (TRF): All purchases pertaining to the 2023-2024 fiscal year's Professional Development Fund must be shipped or received (for goods) before April 30th, 2024 to be eligible for reimbursement. Also, any faculty travel and conference to be paid out of PDF must have ADO approval and occur before April 30th to be reimbursed out of the current budget. All submissions with receipts and/or proof of payment must be received in Accounts Payable before end of day **Tuesday April.30th 2024** to be reimbursed.

FOR MORE INFORMATION
CONTACT:
ANGELA BRODT
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 Sparkrock Employee Centre Online Expense Claim Process.

*Travel by personal car - The CRA kilometer allowance is currently .64/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 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.30. to avoid the late delivery of items. An item that does not ship until May 1. will be expensed in the next fiscal.

Department Invoices for the 2023-2024 budget year will be processed as accruals if the item was shipped or the service was performed prior to April.30. 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 30. to qualify for the 2023-2024. Goods and services that pertain to the period after April 30th will be recorded in the next fiscal's budget.

Non-Employee Payment Requests: As of May.1st 2024, all Non-Employee Payment Request Forms will also require banking information (void cheque or bank form) and an email address. Non-Employee payments will be made via direct deposit to the recipient and an emailed remittance will be issued.

*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:

Hourly Payroll:

Final submission for all 2023-24 (May 1, 2023 – April 30, 2024) electronic hourly timesheets will be **Thursday, May 2nd, 2024**. Any submissions after this date will require a new **2024-25** contract and will be processed in the new budget year. Please ensure all hours have been electronically submitted on a timely basis through MySparkrock.

MANULIFE BENEFIT
INQUIRIES?

CONTACT DIRECTLY AT
1.800.268.6195

All hours worked from **May 1-4, 2024** will have to be submitted by May 10, 2024 via manual timesheet. The link to manual timesheet can be found on the payroll and benefits website: <https://www.kings.uwo.ca/kings/assets/File/depts/finance/payroll/ManualTimeSheet2023-24.pdf>

New contracts for 2024-25 can be submitted online during the month of April. Timesheet Contract and any information regarding timesheet contracts can be found at the link below: <https://www.kings.uwo.ca/about-kings/facts-and-information/administrative-departments/finance/payroll-benefits/>

SUNLIFE RRSP

INQUIRIES?

CONTACT DIRECTLY AT

1.866.733.8613

Please ensure all information is completed on the contract. All new employees to King's will need to upload tax forms (TD1 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, 2024 or later). The employee can electronically enter hours effective from their start date through the Employee Centre.

Staff Payroll: All Staff OT to be paid must be submitted no later than **Monday, April 22nd, 2023** for the April 25th, 2024 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 King's Employee Centre. 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 on the Ministry site 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/>

2023 Pension Statements: The 2023 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 Katherine Ng Thajer 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:

KATHERINE NG THAJER, PAYROLL & BENEFITS SUPERVISOR

NICOLE KOYANAGI, PAYROLL & BENEFITS COORDINATOR

IZABELA MATKOWSKI, PAYROLL & BENEFITS ASSISTANT

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:

T2202: 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 2023 form will be available online: <http://student.uwo.ca> no later than Feb 28th, 2024.

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 2023 slips will be made available online to students through <https://mykings.ca/sfs-portal> 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 2023 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 62 Summer Employment Opportunities for students; 50 Work Study positions for domestic students and 12 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 online in early to mid April. Starting in May of 2024, there will be four rates of domestic tuition; Ontario resident MOS rate, Out of Province MOS rate, Ontario resident Non-MOS rate and Out of Province Non-MOS rate. Please check the King's website for the most up to date fee information; [Fees and Responsibilities - King's University College \(uwo.ca\)](#).

Summer OSAP: Information about summer OSAP will be emailed to all domestic students and posted online by March 1st. Members of the SFS team will be hosting 4 sessions for students during March and April to assist students in the summer OSAP application process. Details about the sessions will be circulated in Things at King's.

Sparkrock 365

FOR FURTHER INFORMATION:

VISHAL KOTHARI

ASSOCIATE DIRECTOR OF FINANCE

Transition of the Finance and HR information system from Dynamics 2016 to Sparkrock 365 is now completed.

With this upgrade, there have been changes for accessing Employee related expense claim submissions and tax forms (MYSPARKROCK), Departmental Budgets (SPARKROCK365), and Fund Balances. These categories can be accessed by visiting the King's Employee Centre at <https://www.kings.uwo.ca/its/kings-employee-centre/> and clicking on the relevant App. Each category has a Help button, click on this button for application help documentation. For any issues not addressed in the help documentation, please submit a ticket to ITS.

FOR MORE INFORMATION

CONTACT:

SHELLY GUERIN

STUDENT FINANCIAL
SERVICES OFFICER

NATALIE WALZAK

STUDENT FINANCIAL AID COORDINATOR

AMBER PATRICK

STUDENT FINANCIAL AID COORDINATOR

KELLIE KNECHTEL

ASSISTANT STUDENT FINANCIAL
SERVICES OFFICER

VANESSA FORTIER

STUDENT FINANCIAL SERVICES CLERK