Fiscally Fit
Office of the AVPAF
February 2019

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Bursar  FIM  Purchasing  University Accounting  Payroll  Grants and Contracts

Office of the Associate Vice President for Administration and Finance

Oklahoma State University

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Stillwater, OK 74078
Phone: 405-744-4188
Email: avpaf@okstate.edu
Website: http://avpaf.okstate.edu/
WILAM Spotlight

SAMANTHA LYNCH
Supervisor, University Collections
– Office of the Bursar

Nice to meet you Samantha!

Each month one person will be randomly selected to spotlight as our WILAM Spotlight Employee. If you haven’t turned your form in yet, please submit it to Lynette Rhea, lynette.rhea@okstate.edu. Forms can be found here.

Responsibilities:

• Works with Perkins Loan recipients to clear up accounts
• Oversees Perkins Loan Servicer and collection agencies
• Processes paperwork to send to the Department of Education

Previous Experience:

• Branch Manager of Regional Finance – 3 years
• Assistant Manager of Pioneer Loans – 9 years

Education:

• Bachelor of Science in Criminal Justice Administration, May 2013
• Associate of Arts with a Concentration in Criminal Justice, August 2009

Other Interesting Facts:

• Loves to be outdoors
• Loves spending time with family and friends
• Loves to laugh and just be happy
Financial Tip of the Month

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W-2s Available Online for OSU Employees

W-2s are now electronically available on Self Service Banner (SSB) for Oklahoma State University employees. Supervisors should make sure their employees, including student employees, are aware that 2018 W-2s can now be accessed. More details are provided below:

Log in to https://portal.okstate.edu
Select Self Service:

Select Employee:

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W-2s Available Online for OSU Employees
-continued

Select Tax Forms:

Select W-2 Wage and Tax Statement:

Select Tax Year 2018:
Change Employer or Institution to: Oklahoma State University (with no year behind it)

To Print, right click on the document and select Print.
Selection of Receiving W-2 Electronically Only

While you are logged in at SSB, please consider selecting the option to receive your W-2 electronically only. By selecting electronic only, you will help save the institution in paper, envelopes, postage and human resources. Detailed instructions to make the selection can be found in the following steps:

From the Main Menu in SSB, select Employee:

Select Tax Forms:
Selection of Receiving W-2 Electronically Only - continued

Select Electronic Regulatory Consent:

Check the boxes to consent to receive your tax statement electronically and select submit:
IRS Withholding Calculator

The IRS encourages everyone to use the Withholding Calculator to perform a quick “paycheck checkup.” This is even more important following the recent changes to the tax law for 2018 and beyond.

The Calculator helps you identify your tax withholding to make sure you have the right amount of tax withheld from your paycheck at work.

There are several reasons to check your withholding:
• Checking your withholding can help protect against having too little tax withheld and facing an unexpected tax bill or penalty at tax time next year.
• At the same time, with the average refund topping $2,800, you may prefer to have less tax withheld up front and receive more in your paychecks.

If you are an employee, the Withholding Calculator helps you determine whether you need to give your employer a new Form W-4, Employee’s Withholding Allowance Certificate. You can use your results from the Calculator to help fill out the form and adjust your income tax withholding. If you receive pension income, you can use the results from the calculator to complete a Form W-4P and give it to your payer.

The link for the IRS Withholding Calculator can be found at https://www.irs.gov/individuals/irs-withholding-calculator.

Federal and State Tax Withholding

If you determine you need to change your withholdings, a helpful resource including step by step instructions can be found on Payroll Services website at https://payroll.okstate.edu/payroll-tax-withholding-forms.
Budget Training Session

The Office of Budget & Asset Management has announced they’ve added an additional training on “Managing Your Departmental Funds in Banner” to be held March 27, 2019.

Some topics that will be covered include: navigation and explanation of some helpful Banner 9 pages (Finance and HR); budget transfers, queries, reconciliations, carryforward/fund balance and Banner Access Request.

If you or anyone in your area might benefit, you can enroll on the Learning Management System at http://talent.okstate.edu/.
Departmental Student Emergency Foundation Funds

Some departments have Foundation funds with the purpose to deliver assistance directly to a student for emergency - unusual outside needs. There should be an application process within the department(s) to state the emergency situation warranting the assistance.

Financial Aid provides feedback to the requester with the student’s financial aid status regarding the disbursement. The Bursar Office is the mechanism to provide the Emergency Fund check directly to the student through use of the CVI/Exhibit A process with an OSU department fund number. This process can take up to 24-48 hours to process the check.

The individual department requests a reimbursement from the Foundation to the OSU department fund.

If you have questions regarding the process, please contact Laurie Beets at (405) 744-8098.
Embedded Office Viewer

ApplicationXtender allows you to view, edit, and print Microsoft Office 2003 and 2007 documents in a native Office embedded window inside the ApplicationXtender Document Display view. This capability, which is available for Word, Excel, PowerPoint, and Visio Office document formats, uses Microsoft Object Linking and Embedding (OLE) technology.

You can enable the Office Viewer feature in ApplicationXtender Document Manager by selecting the **Use KeyView to display foreign files** option on the View tab of the Configuration dialog. If KeyView is enabled, ApplicationXtender displays supported Office documents using the Office Viewer automatically, in either read-only mode (without Office toolbars) or edit mode (with Office toolbars), depending on the current document read/write permission.

After editing a supported Office document within the embedded Office Viewer, you can:

- Save the file as a new page version using the **Save** button on the Office toolbar
- Discard the changes made to the file by closing the Document Display view without saving the changes

You can also print Office document pages using native Office document printing. Selecting the ApplicationXtender Page > Print command or Print toolbar button (if it is configured to print pages) invokes the Office print functionality. Alternatively, users can print the document using the standard ApplicationXtender Document Print functionality.
Effort Certification for Grants/Contracts

The Effort Certification Report for January 2019 is available for review and Certification.

The report may be found in:

FINANCE 1 Eprint repository
PZREFRM “Effort Certification Report”

For access to the report

Use the Banner Access Request Application found under the “employee” tab in the Banner portal.
1. Select Campus OSU/Tulsa
2. Select Module FINANCE
3. Select Eprint Reports for Grants Principal Investigators---
4. IN COMMENTS: Restate “PZREFRM-Effort Reporting”. “Eprint FINANCE 1” “USR_FI_PI_EPRINT_OSU_G” “Charts 1-9”
Contract Spotlight – Copiers/Multi-function Devices

Purchasing has conducted a competitive request for proposals for copiers/multi-functional devices and related products/services.

The award has been issued to six (6) suppliers for nine (9) brands of equipment. Equipment may be leased or purchased (lease-to-own-purchases are prohibited).

For a detailed breakdown and ordering instructions, please use the Contracts/OSHOP tile in OK Corral and select the link for Copiers/Multi-function Devices or click the below link:

http://airs.okstate.edu/okcorral/oshop/copiers.html

New Training Courses for 2019

Purchasing is offering two new training courses for 2019, “Advanced OK Corral Training” and “Legal Issues in Contracts”. These courses will be offered throughout the spring and fall semesters.

Advanced OK Corral Training

This is an in-depth look into the functionality, application, and daily usage of the OK Corral e-procurement system. A hands-on approach incorporating daily purchasing activities into OK Corral while providing tips and tricks for ease of use. We will explore how to select and complete appropriate forms based upon real life situations, review Procurement guidelines, and focus on selecting the best options when submitting a requisition for approval. We will also explore how to complete and submit a proper change order form and how to develop an internal document tracking system for PO’s, invoices, returns, and receipts, as well as other daily purchasing activities.
New Training Courses for 2019
-continued

Legal Issues in Contracts

Contracts are an important part of University procurement. This session will review basic contract provisions and what the University can and cannot include in contracts. Review of issues to consider when negotiating and reviewing contracts. Presented by Brandee Hancock, Board of Regents Associate General Counsel

To enroll, follow this link to the OSU Talent – LMS portal:
https://idp.okstate.edu/oxauth/login

Other Purchasing Training Opportunities

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Course</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 18, 2019</td>
<td>1:30 PM – 4:30 PM</td>
<td>OK Corral Basics</td>
<td>403 CLB</td>
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<tr>
<td>March 19, 2019</td>
<td>9:00 AM – 12:00 PM</td>
<td>Procurement Basics</td>
<td>126 ITLE</td>
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<td>April 9, 2019</td>
<td>9:00 AM – 12:00 PM</td>
<td>Legal Issues in Contracts</td>
<td>416 Student Union</td>
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<td>April 16, 2019</td>
<td>1:30 PM – 4:30 PM</td>
<td>Advanced OK Corral Training</td>
<td>446 Murray</td>
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<tr>
<td>April 17, 2019</td>
<td>1:30 PM – 4:30 PM</td>
<td>Building a Better Bid</td>
<td>126 ITLE</td>
</tr>
</tbody>
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Board Dates

Requisitions requiring Board of Regents approval (greater than $250,000) are due in Purchasing by April 3, 2019, 5:00pm, for the April 26, 2019 Board Meeting.
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