M O N T H E N D  C L O S I N G  D A T E S

M A R C H  C L O S E
March Month End Close: April 6th
March Budget Report Distribution: April 8th

A P R I L  C L O S E
April Month End Close: May 4th
April Budget Report Distribution: May 6th

E V E N T S
ACOUNTING & B UDGET O PEN F ORUM
4/28 2:00pm-3:30pm
THC 305
The following will be discussion topics at the AB Forum:
⇒ Fiscal Year-end Review
⇒ Position Budget & HR Recruiting
⇒ And more...

G E T  T O  K N O W  T H E  S T A F F!
Featured this month: Jean Himmelspach from Student Accounts.
Learn more about Jean and her new role.

Follow the links for quick facts on the departments listed below:

Controller’s Office

PCard Statements: All pcard statements are due to the Accounts Payable Office by the 10th of each month.

BannerWeb Forms: To ensure your payments and reimbursements are processed as accurately and as quickly as possible, please utilize the BannerWeb Check Request or Travel & Expense Reimbursement Form for all payment/reimbursement requests sent to Accounts Payable.

Asset Removal Form: If your department disposed of, traded-in, sold or replaced any equipment with an original cost of $5,000 or more, please submit the Asset Removal Form to Monica Booker at accounting@richmond.edu.

New Contract Management System: The University has purchased a contract management system to manage the life cycle of all University contracts. The system provides a central database for University contracts, contains an automated workflow approval process, and allows proactive management of University contracts to ensure compliance. More information about the system and training sessions will be forthcoming.

New mailbox: For all accounting questions and journal entry requests, contact accounting@richmond.edu.

Welcome Kai Sommer: The Controller’s Office is pleased to welcome Kai Sommer to his new role as Manager of Financial and Investment Accounting. Kai joins us from UR Internal Audit, where he worked for the past three years. His email is ksommer@richmond.edu and his extension is 8371.

Office of Planning & Budget

OPB mailbox: For all budget related questions and budget journal entry requests, contact OPB@richmond.edu.

Finance Security and Reports: Have you ever wondered why some people receive a budget report or why some people have access to Banner? Click here to learn more about OPB’s tenets, report distribution philosophy, and how to obtain Banner access.

Banner Finance 101: Do you have Banner access and need further training? Click here to sign up for Banner Finance 101 to learn more about Bannerforms FGIBDST, FGITBAL and BannerWeb.

Banner Finance 201: Do you have a general understanding of BannerWeb and want to learn how to develop and customize your own budget reports? Click here to sign up for our intermediate instructor-led Banner Finance 201 training class.

New Budget Form: An online form for users to submit budget journal entry requests through the OPB website is coming soon!

Articles of Interest:

Calling All Universities with Endowments of Over 1 Billion: Congress has plans for universities with large endowments to use more of their endowment each year to lower the cost of tuition. See what the University of Richmond and similar schools are doing in the wake of this change.

University of California Berkeley — New Strategic Plan: Learn more about UC Berkeley's new Strategic Plan, and how highly ranked universities use strategic planning to adjust to a changing market. View University of Richmond’s strategic planning process.

Sweet Briar — Long Term Enrollment Plan: It’s that time of year when decision letters are pouring out. Learn more about Sweet Briar’s year-long journey with enrollment management and how other liberal arts colleges stay competitive. Be sure to follow #Richmond2020 to learn more about Richmond’s most recent enrollment journey.