Welcome to the School of Management Business Operations Services Catalog

Business Operations manages the budget, finance, purchasing and student payroll function for the Yale School of Management. The SOM Business Operations Service Catalog has information about our SOM business services and offerings, as well as our knowledge articles. You can find information about service features, the intended audience, and how to access it as well as related SOM or University policies and procedures.

COVID-19 Business Operation Updates

Please see the below information from the Central Financial Departments regarding changes during the COVID-19 virus. Please feel free to reach out to sombusiness.office@yale.edu with any questions.

Interim Purchasing and Reimbursement Policy (For Employees in Remote and Hybrid Working Arrangements) - August 11, 2021

- Incremental purchases to support multiple work locations (e.g., home office and Yale office) are generally not allowable. Departments may, however, exercise discretion in permitting reasonable incremental purchases of peripheral items (e.g., computer mice, keyboards, mouse/keyboard batteries, laptop chargers, headphones, microphones, webcams). Purchases of all such items require prior approval from the business operations, sombusiness.office@yale.edu.
- Employees, if they wish, may use personal funds to make incremental purchases (e.g., additional monitors, additional laptop docking stations, scanners, desk chairs) to support multiple work locations. Discounts via preferred vendors are available through Personal Purchases with an Authorized Reseller.

This interim policy establishes requirements and guidelines applicable to business expenses in support of remote work during the COVID-19 pandemic.

New Zelle Digital Student Payment implementation

On Monday, April 19, 2021, the University will establish Zelle Digital Disbursements as a new Payment Type and implement it as the primary payment method to issue payments to Yale University students via their university email address for prizes, awards, stipends, and reimbursements.

Zelle is a US-based digital payment network that enables the transfer of money between bank accounts using a mobile device or participating banking institution’s website.

The University is encouraging students to sign up for a Zelle account using their Yale University email address. If you do not establish an account prior to receiving payment, you will receive an email asking you to register to accept payment.

Student Notification:

- Student Recipients Enrolled in Zelle
  - Will receive a notification email
  - Funds will be deposited within 1-3 business days

- Student Recipients not enrolled in Zelle
  - Will receive notification via email of funds with the link to register to enroll to accept the funds
  - After choosing their bank during the enrollment process, they will be able to accept the funds

Reminder Messages:

- Students not enrolled in Zelle will receive reminder messages after 4 days and after 10 days to accept payment within 14 days of the original notification date
Announcements

Accounts Payable - Setup for ACH and wire payments

Recently, Accounts Payable (AP) reviewed its processes for setting up suppliers for Automated Clearing House (ACH) and wire payments and are currently identifying enhancements to those processes. While that review continues, AP is implementing an interim process ensuring all ACH and wire payment recipients are positively identified.

Currently, AP verifies supplier banking information by email. Starting on Wednesday, January 13, 2020, we will verify banking changes for suppliers that provide goods and services with a phone call instead of email. AP will also require that departments submit a supplier contact form with any supplier requests. For all other suppliers, the process will be unchanged.

The reason for this change:

The security of government, business, and higher education computer networks is under constant assault, and compromised email accounts can lead to a compromised accounts payable process. To protect Yale against that concern, we are replacing email as a means of verifying supplier banking information.

What departments need to know:

1. New supplier requests

   • The supplier contact form is meant to collect accounts receivable information for suppliers that provide goods and services. You will be required to email the form to the supplier for completion and include it with your supplier requests.
   • Suppliers will not be set up with missing or incomplete supplier contact forms.

2. Existing suppliers

   • If an existing supplier wishes to change or add ACH or wire as a payment type, you should let them know that a representative from Yale University will be contacting their accounts receivable department to verify the banking information.
   • The change requested will not be made until the information is verified.
   • If verification is not completed within 10 business days of the initial request, the department will be notified.

Possible impacts of the above changes:

1. The length of time it takes to verify banking changes may increase for suppliers providing goods and services, particularly foreign suppliers.
2. Completion of the supplier contact form is an extra step for departments and could delay supplier setups.

Please contact sombusiness.office@yale.edu with any questions or concerns.

Contact Business Operations for Help!

Business Operations Office Hours

BusOps Office hours

Arthur Perry, Assistant Director for Business Operations, will be available for BusOps Office Hours on Wednesday’s, 2:00-3:00 p.m. SOM BusOps is available for assistance with your financial needs. Please reach out to ask questions, and discuss any concerns.

To confirm your appointment and for contact information, please email Arthur.

Looking for Forms? All Yale forms can be found here

Explore the SOM Business Operations Service Catalog by Category

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Buying and Paying

Information about purchasing goods and services from a supplier, finding a supplier, shipping options, purchasing guidelines, payment guidelines and travel services assistance.

If this is what you are looking for, visit the Purchasing Goods and Services page directly:

Buying and Paying Toolkit

Payroll - Hiring Contact List, Student Employment (Hourly) and Teaching Assistant

Information about Payroll and Hiring at SOM, including contacts for Payroll, hiring types, information about Yale payroll and more.

If this is what you are looking for, visit the Payroll and Hiring Guides page directly:

Payroll - Hiring Contact List, Student Employment (Hourly) and Teaching Assistant

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<th>Hiring Contact List</th>
<th>Information on who to contact to hire different types of employee types at SOM.</th>
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<tr>
<td>Hiring Student Employees (Non-Teaching Assistant Role)</td>
<td>Information on hiring temporary Yale University undergraduate student employees (both work-study and non-work-study students) and the hiring of graduate and professional student hourly employees.</td>
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<tr>
<td>Hiring or Becoming a Teaching Assistant</td>
<td>Information about hiring a Yale Student for a Teaching Assistant role or registering to become a Teaching Assistant can be found here. Remember you must register for each course you teach.</td>
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Information about student club reimbursements, Enterprise Learning Credits (ELC) and Case Competition Award Payments

If this is what you are looking for, visit the Student Clubs Reimbursements, Purchasing and Enterprise Learning Credit (ELC) page directly

<table>
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<tr>
<th>Ask a question</th>
<th>Students use this form to ask the business operations team a question</th>
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<td>Reimbursements Request (Student Club)</td>
<td>Information on submitting a student club reimbursement request and the reimbursement process.</td>
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<td>Enterprise Learning Credit (ELC)</td>
<td>Information on student reimbursements for Enterprise Learning Credits (ELC) and the reimbursement process.</td>
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<td>Purchasing Requests (Student Club)</td>
<td>Information on submitting a student club purchasing request process</td>
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<td>Case Competition Award Payments</td>
<td>Information on submitting case competition award payments and the reimbursement process.</td>
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<td>Student University Forms and School of Management Club Links</td>
<td>Forms and links to help the Student and Club Reimbursement Process.</td>
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<td>Grubhub - Virtual Meetings (EXTERNAL)</td>
<td>Information on submitting Grubhub requests for virtual meetings (EXTERNAL funds only)</td>
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Annual spending memo's, Yale School of Management Business Operations helpful links to assist with financial transactions

If this is what you are looking for, visit the Yale School of Management Spending Guides and Helpful Links page directly

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<td>SOM Faculty Spending Guidelines</td>
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<td>SOM Staff and Program Spending Guidelines</td>
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<td>Commonly Used Expenditure Types</td>
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Yale University helpful links for financial transactions and University websites

If this is what you are looking for, visit the Yale University Helpful Links page directly
## Yale University Helpful Links

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<th>Service</th>
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<td><strong>Directory</strong></td>
<td>Yale University Faculty, Staff and Student Directory</td>
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<tr>
<td>eShipGlobal site</td>
<td>Send packages via Federal Express, UPS, USPS and DHL and charge the expense directly to your account using a VIP number. <em>Please login with your Net ID and password.</em></td>
</tr>
<tr>
<td>International Tax Office</td>
<td>This page provides the University community with a comprehensive guide and planning tool with respect to payments made to non-U.S. individuals who are not considered University employees and to non-U.S. entities.</td>
</tr>
<tr>
<td>It's Your Yale</td>
<td>Yale's home page for human resources, finance, and administrative services information</td>
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<tr>
<td>Oanda Currency Converter</td>
<td>Yale's preferred site for a currency converter</td>
</tr>
<tr>
<td>Per-Diem Rates</td>
<td>When it is not practical to claim actual meal expenses, individuals may use the federally published Domestic Per Diem or Foreign Per Diem rates for meals and incidental expenses applicable for the city of travel.</td>
</tr>
<tr>
<td>Transaction Control Number</td>
<td>To obtain a unique identifying number for an electronic form.</td>
</tr>
<tr>
<td>University Forms Page</td>
<td>To ensure you are using the current up-to-date form, please use forms directly from this site. It is not recommended to save forms to your computer directly, this can result in using outdated forms.</td>
</tr>
<tr>
<td>University Policy and Procedu res</td>
<td>Yale’s expectations of its community members, enhance operational efficiency, mitigate risk, and support compliance.</td>
</tr>
<tr>
<td>Workday at Yale Training Guides</td>
<td>Explore training resources for Workday Financials, which include: Chart of Accounts, Expenses, Finance, Procurement, and Sponsored Awards. Training resources are available in a variety of formats including videos, training guides, quick guides, and other support documentation.</td>
</tr>
<tr>
<td>Yale Travel Management</td>
<td>Yale Travel Management provides travel services to faculty, staff, and students when traveling on official university business.</td>
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Additional Resources

| Event Management | Facilities & Operations | Finance & Administration | Human Resources | Mailroom | SOM Hospitality |

Top Knowledge Articles

**Students**
- Enterprise Learning Credit (ELC)
- Hiring or Becoming a Teaching Assistant
- Student Club Reimbursements
- Student University Forms and School of Management Club Links
- Yale SOM Jira Ticketing System

**Staff and Faculty**
- SOM Faculty Spending Guidelines
- SOM Staff and Program Spending Guidelines
- University Forms Page
- University Policy and Procedures
- Workday at Yale Training Guides

SOM Business Operations Service Catalog (Full Listing Alpha Order)

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  - Employee Reimbursements and P-Card Charges
  - Payment Methods
  - Requisition to Purchase Order
  - Spend Authorization
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- Payroll - Hiring Contact List, Student Employment (Hourly) and Teaching Assistant
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- Student Club Reimbursements, Enterprise Learning Credit (ELC), Purchasing and Case Competition Award Payments
  - Case Competition Award Payments
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  - Grubhub - Yale Corporate Account
  - Required Information/Documentation (Employee vs Supplier)
  - Student Club Purchasing
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  - Student University Forms and School of Management Club Links
- Yale University Helpful Links
- YSOM Spending Guides and Helpful Links