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:

<table>
<thead>
<tr>
<th>Student Recipients Enrolled in Zelle</th>
<th>Student Recipients not enrolled in Zelle</th>
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<tr>
<td>· Will receive a notification email</td>
<td>· Will receive notification via email of funds with the link to register to enroll to accept the funds</td>
</tr>
<tr>
<td>· Funds will be deposited within 1-3 business days</td>
<td>· After choosing their bank during the enrollment process, they will be able to accept the funds</td>
</tr>
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</table>

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
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.

1. 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.
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.

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<th>Buying and Paying Toolkit</th>
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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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<tr>
<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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<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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</table>
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

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**YSOM Spending Guides and Helpful Links**

| SOM Faculty Spending Guidelines | Annual guidance for incurring and processing Faculty expenses, including travel, conferences, procurement, and restricted items. |
| SOM Staff and Program Spending Guidelines | Annual guidance for incurring and processing Staff/Program expenses, including travel, conferences, procurement, and restricted items. |
| Commonly Used Expenditure Types | List of frequently used Expense Items vs. Workday Spend or Revenue Category. |

**Yale University Helpful Links**

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.
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<td><strong>Oanda Currency Converter</strong></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)

**Index of Categories > FAQs & Offerings**

- **Buying and Paying Toolkit**
  - Employee Reimbursements and P-Card Charges
  - Payment Methods
  - Requisition to Purchase Order
  - Spend Authorization
  - Supplier Invoice
  - Supplier Invoice Request
  - Supplier Set Up and Change Requests
- **Get Help From Business Operations**
- **Payroll - Hiring Contact List, Student Employment (Hourly) and Teaching Assistant**
  - Hiring Contact List
  - Hiring Student Employees
- **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
  - Student Club Reimbursements
  - Student University Forms and School of Management Club Links
- **Yale University Helpful Links**
- **YSOM Spending Guides and Helpful Links**