

# **FAS Administrators' Town Hall**

**November 21, 2019**  
**Science Center, Lecture Hall D**



# Agenda

**Welcome, Introductions**

Leslie Kirwan

**One Harvard, One Link**

Professor Dustin Tingley

**Financial Updates**

Leslie Kirwan, Jay Herlihy

**Annual Policy Review**

Andrea Sexton, Karen Kittredge

**FY20/21 Administrative Landscape**

Mary Ann Bradley

**HR:**

Atlas Team Members, Kathy Santoro

- **Administrators' Atlas**
- **PFMLA**

**Closing / Q & A Session**

Leslie Kirwan



# Welcome & Introductions

**Leslie Kirwan**

*Dean for Administration and Finance*



One Link. One Harvard.

Dustin Tingley  
Office of the Vice Provost for Advances in Learning  
[vpal.harvard.edu](https://vpal.harvard.edu)



HARVARD

Office of the Vice Provost for Advances in Learning

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## GOALS FOR LINK

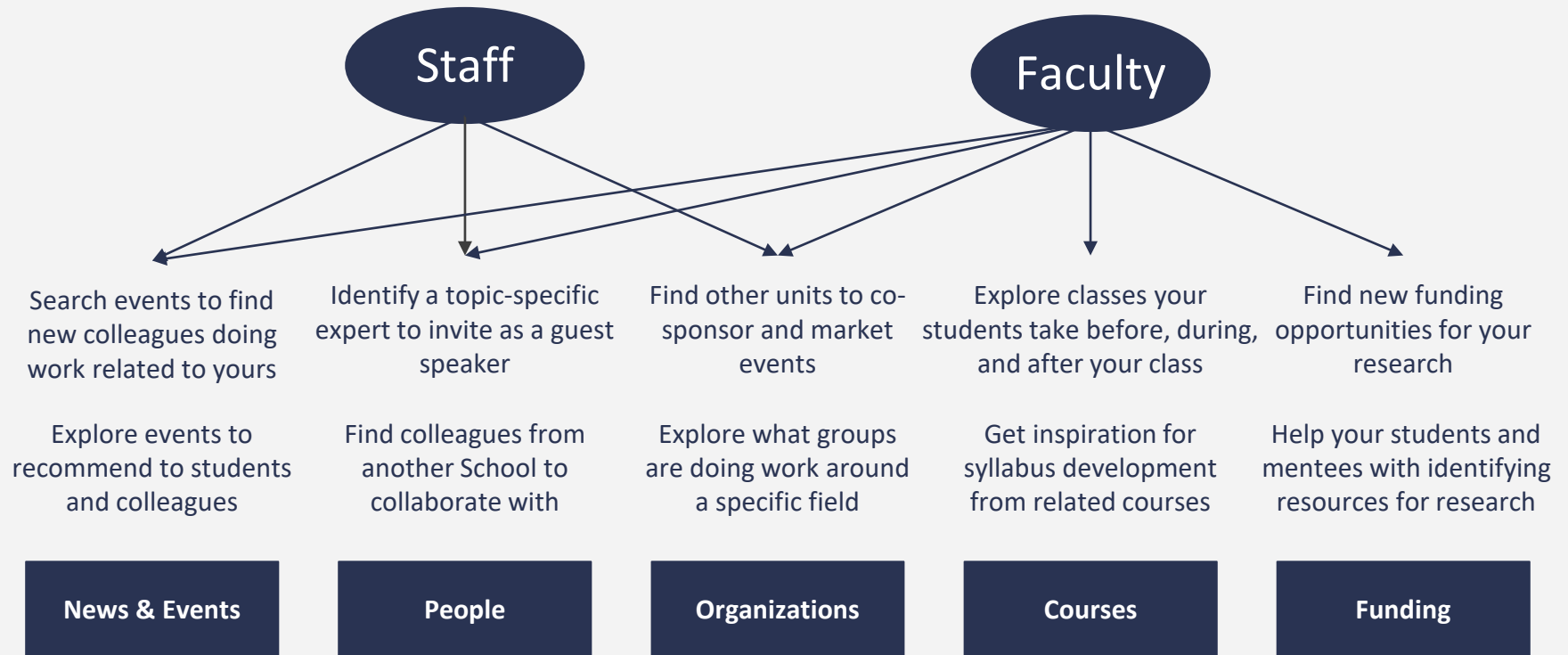
### Search Efficiency

Link aggregates and structures data to help you find what you are looking for within Harvard.

### Community Building

Link uses personalized suggestions to help you build stronger connections to the Harvard community.

# AUDIENCES, USE CASES & DATA TYPES



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## ACCESS & AUTHENTICATION

**#1**

Must have an active  
HarvardKey

**#2**

Must have an active  
employment record  
in PeopleSoft

**#3**

Primary role must be  
faculty or staff

- Provides security
- Enables individualized personalization
- Allows for customization based on affiliations (School, role)

# LINKS TO RESOURCES

for **Dustin Tingley**  
**Professor of Government**  
FACULTY OF ARTS AND SCIENCES  
Government  
**Deputy Vice Provost for Advances in Learning**  
OFFICES OF THE PRESIDENT AND PROVOST  
✉ dtingley@gov.harvard.edu  
📧 scholar.harvard.edu/dtingley  
📧 gov.harvard.edu/people/dustin-tingley

Update your website and/or add keywords to improve your recommendations.

**Search**  
Search Harvard Link resources including news and events.  
Search in News  
(enter a search term) **Go**

**Quick links** [\[edit\]](#)  
**Teaching Resources**  
• [Derek Bok Center for Teaching and Learning](#)  
• [Harvard Initiative for Learning and Teaching](#)  
• [My FAS Canvas Courses](#)  
• [my.harvard](#)  
• [Syllabus Explorer](#)  
**General**  
• [Harvard Human Resources](#)  
• [Sexual & Gender-Based Harassment Policy/Resources](#)  
• [PeopleSoft](#)  
• [Expense Submissions \(Concur\)](#)

## Inputs:

- Your role as faculty and/or staff
- Your School and unit affiliations

## Outputs:

- Teaching and learning resources specific to your School
- Links to your Canvas course site
- Important links determined by your School's leadership

**Quick Links**  
Select which links you want to see on your Harvard Link homepage.

Teaching Resources	General
<input checked="" type="checkbox"/> Derek Bok Center for Teaching and Learning	<input type="checkbox"/> Resources for Faculty & Researchers
<input checked="" type="checkbox"/> Harvard Initiative for Learning and Teaching	<input type="checkbox"/> PI Dashboard
<input type="checkbox"/> Teach with the Harvard Library	<input type="checkbox"/> Research Funding
<input checked="" type="checkbox"/> My FAS Canvas Courses	<input checked="" type="checkbox"/> Harvard Human Resources
<input checked="" type="checkbox"/> my.harvard	<input checked="" type="checkbox"/> Sexual & Gender-Based Harassment Policy/Resources
<input checked="" type="checkbox"/> Syllabus Explorer	<input checked="" type="checkbox"/> PeopleSoft
<input type="checkbox"/> Digital Assets for Reuse in Teaching	<input checked="" type="checkbox"/> Expense Submissions (Concur)
<input type="checkbox"/> Active Learning (ABLConnect)	<input type="checkbox"/> Outings & Innings
<input type="checkbox"/> Instructional Moves	<input type="checkbox"/> Register International Travel
<input type="checkbox"/> Usable Knowledge	

**Add your own links**

URL	Name
<input type="text" value="https://example.harvard.edu"/>	<input type="text" value="Example Site"/>

+ Add a link

**Update**

Add more suggested links and define your own favorite links



# SEARCH EFFICIENCY

Use basic keywords or  
advanced operators

Search within a  
specific data type

The image shows a search interface for Harvard's link database. It includes a search bar, a 'Go' button, and filters for data type, time, sorting, and source. Annotations with curly braces highlight specific parts: one brace is under the search bar, another is under the 'Events' data type button, and a third is under the 'Relevance' and 'Date' sorting buttons.

Search

**Go**

In **News** **Events** People Organizations

When **Next 30 days** ▼

Sort by **Relevance** Date

From (any events source) ▼

Within each data type, choose  
from a variety of filters

# EXPLORE *YOUR* HARVARD

## Harvard people recommended to you

**Joshua David Kertzer**

Faculty of Arts and Sciences

**Stephen Martin Walt**

Harvard Kennedy School

**Kosuke Imai**

Faculty of Arts and Sciences

**Christina L. Davis**

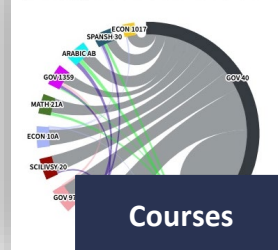
Faculty of Arts and Sciences  
Radcliffe Institute for Advanced Study

[More people](#)

## People

## Concurrent enrollments

Top 10 courses by number of concurrent enrollments with GOV 40



## Courses

## Personalized to each user

## Campus organizations related to your interests

### Solar Geoengineering Research Program

[geoengineering.environment.harvard.edu](http://geoengineering.environment.harvard.edu)

26 Oxford Street

### Harvard Project on International Climate Agreements

[www.belfercenter.org](http://www.belfercenter.org)

79 John F. Kennedy Street

### Future of Diplomacy Project

[www.belfercenter.org](http://www.belfercenter.org)

79 John F. Kennedy Street

## Organizations

[Download syllabus \(PDF\)](#)

## Syllabi

## Recent Harvard news

### Solar Geoengineering Research

Oct 15, 2019

Harvard Environmental Economics Program Launches "Environmental Insights," a New Podcast Designed to Educate and Inspire

Oct 8, 2019

## News

## Upcoming events

### Solar Geoengineering Seminar Series

Wed Nov 20, 2019 (12pm)

### Solar Geoengineering Seminar Series

Wed Nov 6, 2019 (12pm)

### The Peril and Promise of Solar Geoengineering

Wed Oct 30, 2019 (6-7pm)

## Events

## Research Funding

United States in the last 24 months that best fulfills the objective of improving democratic governance through an examination of the intersection between the media, politics and public policy. A prize of \$5,000 is [...]

### Funding

A prize of \$5,000 is awarded to the winner in each category.

### Deadline

Dec 1, 2019

[More info on shorensteincenter.org](#)

## AMERICAN POLITICAL SCIENCE ASSOCIATION

### Congressional Fellowships for Political Scientists

The American Political Science Association Congressional Fellowship Program is a highly selective, nonpartisan program devoted to expanding knowledge and awareness of Congress. Since 1953, it has brought select political scientists, journalists, federal employees, health specialists, and other [...]

### Funding

Recipients of the APSA Congressional Fellowship receive a stipend of \$52,500, plus a small travel allowance. In addition, APSA will cover the cost of [...]

### Deadline

Dec 3, 2019

[More info on www.apsanet.org](#)



# BREAKING SILOS

## 1 Filters

Harvard people recommended for you

In

Filters encourage users to view suggestions and search results outside of their current circles

## 2 University-wide Data

Specific division

- Faculty of Arts and Sciences (151)
- Harvard Medical School (61)
- Harvard Business School (55)
- Harvard Kennedy School (43)
- Harvard T.H. Chan School of Public Health (30)
- Harvard Law School (20)
- Offices of the President and Provost (9)**
- Harvard Graduate School of Design (5)
- Harvard Graduate School of Education (4)

Data is aggregated from Schools, departments, and centers from across the entire University

## 3 Suggestions

Update your website and/or add keywords to improve your recommendations.

Suggestions balance surfacing relevant content and facilitating exploration of new things

# BUILDING LINK



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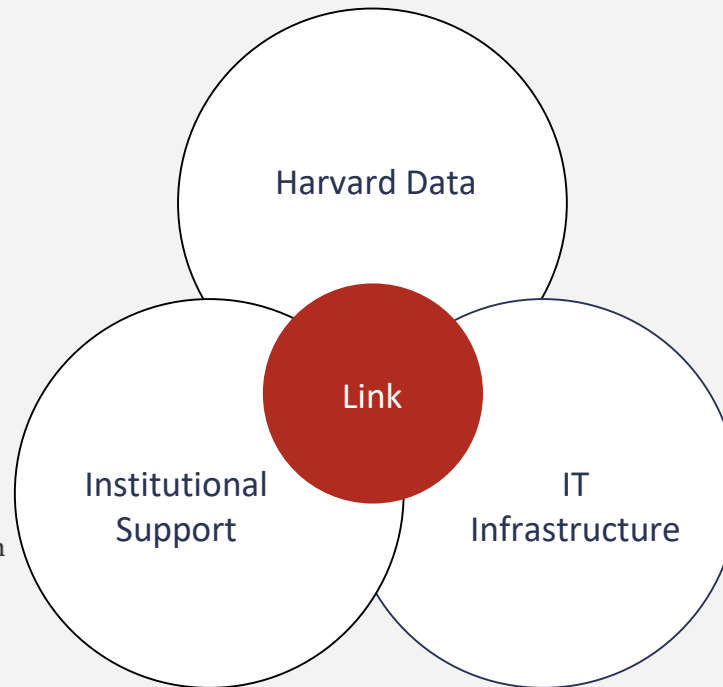
The Institute for Quantitative Social Science



Office of the Vice Provost for Research



HARVARD  
LIBRARY



HARVARD **KEY**  
**my.** HARVARD

PeopleSoft

 **CANVAS**

 | HARVARD  
**CATALYST**  
OpenScholar

Electronic Communications Policy Oversight Committee

Multiple Harvard faculty & staff, including Professor Andrew Ho (GSE)

[link.harvard.edu](http://link.harvard.edu)



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# HARVARD DATA - ADVANCED DIRECTORY INFORMATION

**ADI** is directory information with rich metadata. These directories did not previously exist, so the Link team created them.



- Professional websites for all **Harvard faculty** to compliment OpenScholar and Catalyst sites
- Websites for all **Harvard organizations**, including departments, centers, initiatives, programs, etc.
- Feed information for Harvard **event** listings and **news** outlets from across organizations
- Internal **research funding opportunities** from across Harvard to compliment worldwide opportunities from library subscription (SPINPlus)

**ADI 2.0** - Support the development of infrastructure and processes to maintain and grow both existing and new ADI sources.

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## OTHER COLLABORATORS THAT POWER LINK

Building Link is a collaborative effort that involves support from parties across the entire University

Users

Users improve recommendations (both their own and others') by **adding their professional websites and keywords**

Orgs

Collaborating with organizations helps Link keep its data (websites, events, news, funding) robust, up-to-date, and accurate

Schools

Leadership from Harvard Schools shape the resources shared on Link, are important voices in promoting Link, and provide valuable product feedback

Staff

Staff from across the University play a critical role in helping the Link team navigate the complex technical and political landscape within Harvard

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# DATA PIPELINE HIGHLIGHTS

## Scale

- **>500,000** lines of (smart) code
- **2 million** words in Harvard-based text corpus
- **8 billion** rows of data

+

## Intelligence

- **Self-writing code** that reconfigures itself
- **Fuzzy logic algorithms** that deduplicate repetitive events from different sources
- Custom **parsing scripts** that standardize unstructured data
- **Term vectorization** and **tf-idf weighting** to extract meaning from text

# DATA SUMMARY

As of November 2019. Data will grow through Link's automated aggregation processes.



**49,849**

Harvard employees  
have access to Link

**10,944**

Faculty and staff  
websites



**450**

Harvard organizations



**11,503**

Harvard syllabi



**167**

Harvard news feeds

**25,506**

News articles

**169**

Harvard event feeds

**6,286**

Events



**78**

Internal Harvard research funding  
sources

**5,660**

Worldwide research funding  
opportunities



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## FUTURE EXTENSIBILITY

- |   |                  |   |   |
|---|------------------|---|---|
| 1 | New features     | { | “Channels” to view content across data types associated with a topic (e.g., Diversity, Inclusion & Belonging) |
| 2 | New data streams | { | Harvard College Central Calendar for events<br>Harvard Magazine & The Crimson for news                        |
| 3 | New data types   | { | Harvard Library for Harvard collections<br>Harvard Planning Office for location data                          |
| 4 | New audiences    | { | Harvard students<br>Alumni  |

# DISSEMINATION *(coming soon)*

## Harvard Link Digest

Personalized suggestions on happenings around Harvard, brought to you by the Office of the Vice Provost for Advances in Learning

### Upcoming Events

#### [Science, Technology and Society Seminar: STS Circle at Harvard](#)

October 21, 2019

'The (Non)Imaginations of "Data" in Law, and their Politics' Speaker: Przemyslaw Palka, Research Scholar in Law and Private Law Fellow, Yale Law School. Moderator: Sam Weiss Evans, Science, Technology & Society Fellow, Harvard Kennedy School. Co-sponsored by the Graduate School of Arts and Sciences and the School of Engineering and Applied Sciences. Contact: STS [Programts@hks.harvard.edu](mailto:Programts@hks.harvard.edu) Chair: Sheila Jasanoff, Faculty Associate. Pforzheimer Professor of Science and Technology Studies, Harvard Kennedy School. Lunch is provided if you RSVP. via our online form before Thursday afternoon, Septemb...

#### [Faculty Lunch: Supporting Student-Directed Learning](#)

October 22, 2019

Karen Brennan, Associate Professor of Education, Harvard Graduate School of Education Creating opportunities for students to have choice in and control over their learning is an essential component of designing powerful and meaningful learning experiences. Whether you are working with 10 students or 100 students, negotiating the balance of structure and freedom in the classroom is complex. Associate Professor Karen Brennan will facilitate an interactive session in which we will explore our different teaching contexts and strategies for supporting student-directed learning. To ground this colle...

#### [Industry Seminar: Peak6](#)

October 29, 2019

Leveraging Data Science Across a Diverse Investment PortfolioPEAK6, a technology and investment firm, was an early pioneer in the application of data science in the options market. Today, people believe data science is the cornerstone for efficiently managing risk. PEAK6 has grown by taking lessons learned from using data science and understanding its strengths and weaknesses. In this talk, Matt Hulsizer and Mike Treacy will discuss how PEAK6 was able to harness core principals from the intersection of analytics and trading to successfully expand into different industries, including brokerage...



KLAVIYO Powered by Klaviyo

## Harvard Link Digest

Automated emails at scale, unique to each recipient

### Personalized Content

Powered by Link's data, recipients get personalized periodic emails surfacing upcoming events, new funding opportunities, and more.

### Timely Information

More frequent emails highlight things like recent news, while more seasonal emails may highlight things like related syllabi and new colleagues. Email frequency controlled programmatically.

### Priority Aligned

With Klaviyo integration Link enables an extensible system by which communication efforts from a school or central administration can be segmented to specific Link users or broadcasted to the entire user base.



# BUILDING LINK



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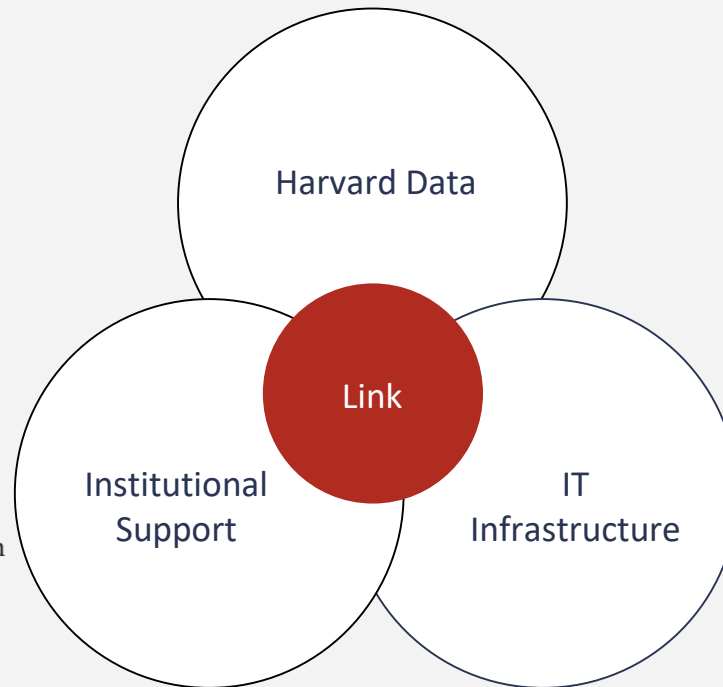
The Institute for Quantitative Social Science



Office of the Vice Provost for Research



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## YOUR CALL TO ACTION

1

Visit [link.harvard.edu](https://link.harvard.edu) to update your keywords (and website).

2

Check if your department's news & events are supported by Link. If they are not, let us know at [link@harvard.edu](mailto:link@harvard.edu). We can work with your department to add them.

3

Share Link with your colleagues. We've created [overview](#) and [use cases](#) documents that make explaining Link easy. We're also happy to provide email language for departmental announcements and to do in-person demo presentations.



link.harvard.edu

Additional Contact:

Zachary Wang, Manager for Resources Adoption and Impact

[link@harvard.edu](mailto:link@harvard.edu)

Link Resources: [bit.ly/harvardlink](https://bit.ly/harvardlink) (video & 1-page overviews; use cases; guides)



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# Financial Updates

**Leslie Kirwan**

*Dean for Administration and Finance*

**Jay Herlihy**

*Associate Dean for Finance*

HARVARD  
FINANCIAL ADMINISTRATION



## ***FAS Administrator's Town Hall***

Karen Kittredge, Manager, Financial Policy and Business Process

Andrea Sexton, Director, Financial Policy and Compliance, Office of the Controller



# Materials and Training



Brown Bag Sessions the 4<sup>th</sup> Thursday of every month from 11:00-12:00 in the Lamont Library Forum Room.

Topics published in the E-News as well as on the [Policy Website](#).

Feedback on suggested brown bag sessions welcome! Email [financialpolicy@harvard.edu](mailto:financialpolicy@harvard.edu) with suggestions.

Financial Policy Office Website: <https://policies.fad.harvard.edu/>

A screenshot of the Financial Policy Office website. The header includes the text "Financial Policy Office" and a search bar. Below the header is a navigation menu with links: HOME, Financial Policies, Other Policies &amp; Reference Materials, People, News &amp; Events, and About. The main content area features a large banner for "Independent Contractor Policy" with a graphic of two green arrows pointing in opposite directions, one labeled "Independent Contractor" and the other "Employee". To the right of the banner is text about the policy revision. Below the banner is a "What's New" section with links to "Financial Policy Summaries" and "Supplier Onboarding Process Session". To the right is an "UPCOMING POLICY EVENTS" section for "Electronic I-9 and E-Verify Training" on November 15, 2019, with details on registration and location.

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Town Hall



# Recent Updates or Uploaded Materials

## Independent Contractor Policy

- A one page [IC PI / Researcher Guide](#)
- [Payment Categories and Hiring Methods if Classified as an Employee](#) reference

## Travel Policy

- Definition of lowest economy class
- Sponsored Travel Guidance and FAQs (updated)
- Air Travel Guidelines at a Glance (new - see next slide)
- Flight Checklist when using Federal or Cost Share Funds (new)
- Sponsored Expenditure Guidelines (updated)
- Materials can be found [here](https://osp.finance.harvard.edu/travel-policy) (<https://osp.finance.harvard.edu/travel-policy>).

## Tax Chart Moving, Recruitment and Related Expenses

Tax Implications for Moving, Recruiting, Visa and Related expenses as well as temporary relocations can be found on the [Tax Office Website](#).

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# Reminders

## Increased Requests for ST-2 or ST-5

Recent MA Tax Changes have resulted in an increase from suppliers for Harvard's ST-2 or ST-5 tax form.

Tax Forms for MA as well as other states and a one-page guide on tax exemption guidance can be found on the Procurement Office Website – [Tax Forms Section](#).

## Year End Tax Reminders

### Update Temporary Placeholder Numbers (temporary or dummy SSN)

Please be sure that any individuals who started work without a government-issued SSN update their records as soon as possible for tax purposes. Individuals without an government-issued SSN are ineligible for tax treaties and cannot apply for tax refunds. Submit SSN card to Payroll/Student Information Services as soon as they are received.

### W-2, 1099-MISC or 1042-S Forms

In order to make sure there are no delays in receiving 2019 tax forms, be sure to make sure your address is up-to-date or better yet, sign up for electronic delivery!

Form	System to Update Address	Link	Sign up for Electronic Delivery
W-2	PeopleSoft	<a href="#">PeopleSoft&gt;my personal details</a>	<a href="#">Harvard's ADP Portal</a>
1099-MISC	HCOM	<a href="mailto:ap_customerservice@harvard.edu">ap_customerservice@harvard.edu</a>	
1042-S	GLACIER	<a href="https://www.online-tax.net">https://www.online-tax.net</a>	<a href="https://www.online-tax.net">https://www.online-tax.net</a>

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# Travel Policy Updates

Updated definition of Lowest Economy Class Airfare (sometimes called coach, standard economy fare class or base airfare) include:

✈ a reserved seat  
✈ one personal item

✈ one carry-on bag  
✈ one checked bag

IF high likelihood that the itinerary may change = OK to purchase a refundable (unrestricted) ticket  
*Include reason in business purpose*

## Updates or Additional Travel Materials when using Sponsored or Cost Share Funds:

- Sponsored Travel Guidance and FAQs (updated)
- [Air Travel Guidelines at a Glance](#) (new)
- Flight Checklist when using Federal or Cost Share Funds (new)
- Sponsored Expenditure Guidelines (updated)

Materials can be found [here](https://osp.finance.harvard.edu/travel-policy) (<https://osp.finance.harvard.edu/travel-policy>).

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# Independent Contractor Policy

- Revised policy went into effect 7/1/19
- New, simplified legal test consistent with MA law
- Must perform test occur *before* IC is retained, any services are rendered, and/or payment made
  - Presumption of employee status unless test is met
  - A worker or department's preference **is not relevant** to the classification determination
- Clarifies roles and responsibilities and that **compliance is the obligation of the local department or unit**
- Streamlined processes for low-risk engagements; **effective 1/1/20 at FAS, qualified individuals may be processed using the IC Questionnaire Exception Attestation Process.**

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# FAS Independent Contractor Questionnaire (ICQ) Exception Process

Under limited circumstances, the formal completion of an ICQ is not required.

- The local department or unit must still confirm that the classification satisfies the three-part legal test
    - See the [Exception Attestation Form](#)
  - A written contract, agreement or confirmation for honoraria is still required
  - The local department or unit must provide the accounts payable approver with the [Exception Attestation Form](#) or statement (for guest speakers) of why an ICQ is not required
- 1) Guest Speaker or Guest Lecturer receiving an honorarium or speaking fee for a one-time speaking engagement (performers/musicians also fall into this category). This exception cannot be used for individuals teaching or co-teaching a substantial portion of a course, those listed as instructors in the course catalog, or those who hold a Harvard appointment for their teaching role.

**Effective  
1/1/20**

- 2) Single, Short-Term Engagements for Less than \$3,000 - An ICQ is not required if the engagement satisfies the three-part Independent Contractor test; the engagement will last no longer than three months (90 calendar days); AND total payments to the IC will not exceed \$3,000. This goes into effect 1/1/20 for services starting 1/1/20 or later. Departments processing these payments must submit the [Exception Attestation Form](#) to their local department payment approver.

Contact your tub [human resources or finance department](#) for more information.

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# Electronic I-9 and E-Verify Project

- Form I-9 is a federally-required employment authorization form all employees must complete
- Harvard's process is paper-based today
- Including E-Verify for all new employees completing electronic I-9
- Pilot electronic I-9 and E-Verify system went live on 11/12/19 with four schools:
  - DCE
  - Graduate School of Education
  - Harvard Law School
  - Limited areas of the School of Public Health

If you have any questions or concerns please reach out to  
[karen\\_kittredge@harvard.edu](mailto:karen_kittredge@harvard.edu)

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# Policies in Process

**I-9 and E-Verify Policy** – sets requirements and processes for collection of the I-9 as well as the requirement of a permanent social security number

**Donation In Lieu of Payment / Honoraria** – sets guidelines and processes for payments in lieu of honoraria.

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# Additional Materials

[Air Travel Guidelines at a Glance](#)

[FAS Hiring Department or Unit Department Approver Responsibilities](#)

[FAS Independent Contractor Policy Contact Information](#)

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### Air Travel Guidelines at a Glance

Harvard strongly encourages travelers to book airline tickets through one of Harvard's [preferred travel agencies](#) and to use [preferred airlines](#). Preferred agencies and airline vendors may provide additional value (e.g., after hours access, fare discounts, free priority seating, boarding or re-accommodation), etc. See the [Travel Policy](#) and FAQ for additional guidance.

	Federal Funds (Including Federal Cost-Share Funds)			Non-Federal Funds / University Funds (If no additional local unit or fund restrictions apply)		
	Domestic Air Travel inside the contiguous 48 United States	Air Travel Involving Canada, Mexico, Alaska, Hawaii, or U.S. Territories and Possessions when flying to, from, or within these locations	International Air Travel with destination and/or origin outside the United States and its territories and possessions	Domestic Air Travel inside the contiguous 48 United States	Air Travel Involving Canada, Mexico, Alaska, Hawaii, or U.S. Territories and Possessions when flying to, from, or within these locations	International Air Travel with destination and/or origin outside the United States and its territories and possessions
Lowest economy class airfare <sup>1</sup>	Required	Required	Required	Required	Allowed within policy	Allowed within policy
Business class if single non-stop flight leg is more than six (6) hours <sup>2</sup>	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Allowed within policy	Allowed within policy
U.S. Flag Carrier unless qualify for an exception as noted in the <a href="#">Fly America Act</a> <sup>3</sup>	Required	Required	Required			
<a href="#">Open Skies Agreement</a> (exception to Fly America which is an agreement between the US and a foreign government) <sup>4</sup>	Required	Required	Required			

<sup>1</sup> Harvard defines lowest economy class airfare (sometimes called coach, standard economy fare class or base airfare) to include a reserved seat, one personal item, one carry-on bag, and one checked bag. Where there is a high likelihood that the itinerary may change; it is appropriate to purchase a refundable (unrestricted) ticket. Include in the business purpose section of the reimbursement request the reason for purchasing a refundable ticket. Under extenuating circumstances certain exceptions may apply (e.g., documented medical reasons, circuitous routing, etc.). For Federal or cost share funds see [Federal Lowest Economy Airfare Travel Reimbursement Exception Form](#) or [Travel Policy](#) for additional details.

<sup>2</sup> Under extenuating circumstances certain exceptions may apply (e.g., documented medical reasons, circuitous routing, etc.). For Federal or cost share funds see [Federal Lowest Economy Airfare Travel Reimbursement Exception Form](#) or [Travel Policy](#) for additional details.

<sup>3</sup> When a non-U.S. flag air carrier is used for travel charged to federally-sponsored or cost-share awards, a [Fly America Travel Reimbursement Exception Form](#) must be completed. If not completed appropriately, the expenses must be charged to a nonfederal award.

<sup>4</sup> An exception to Fly America is when an [Open Skies Agreement](#) is in place between the U.S. government and the government of a foreign country, with the exception of Department of Defense funds. See [Open Skies Document](#).



# FAS Hiring Department or Unit and Department Approver Responsibilities

## Local Hiring Department or Unit Responsibilities

- Determine if the IC Policy applies and initiate any required procedures, including contact with HR consultant and completion of ICQ or completion of the Exception Attestation form.
- Obtain proper review and approval before contract is signed and before any services are performed
- If not using a Harvard contract template, be sure that any IC contract contains the following language:  
**[Consultant/Contractor/Vendor] shall be an independent contractor, free from Harvard's direction and control, and not an agent or employee of Harvard.** See OGC or SP website for contract templates or contact [adminops-procurement@fas.harvard.edu](mailto:adminops-procurement@fas.harvard.edu) if not using a Harvard template or other contract questions.
- Follow local school or unit's internal contract review and signature guidelines
- Collect required documentation to set individual up as a supplier vendor if required

## After services have been completed the Department AP preparer and approver must:

- Confirm ICQ and contract have been completed and are on file
- Review and prepare invoice for payment  
Use appropriate object code for the service completed  
Include with invoice any additional required documentation (e.g., [Exception Attestation Form](#) or [attestation form billing code 8692](#)). Some schools or units may require ICQ and contracts be submitted with invoice, others may store them at the local level
- If the department approver does not receive or have evidence of the above required documentation, the payment cannot be processed

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# FAS Independent Contractor Policy Contacts

- **Questions around the ICQ and Classification Process:**
  - [FAS HR Guidance](#) and Materials can be found at:  
<https://hr.fas.harvard.edu/updated-independent-contractors> or email [ic-request@fas.harvard.edu](mailto:ic-request@fas.harvard.edu)
  - FAS HR will consult with the Office of Labor & Employee Relations, Office of the General Counsel, and Global Support Services as needed
  - For urgent or time-sensitive requests, contact [Audrey Harmon](#) or [Andrea Kelton-Harris](#)
- **Contract Guidance**
  - Contract templates, guidance and a contract checklist may be found on the Strategic Procurement or Office of General Counsel's website
  - Contact [adminops-procurement@fas.harvard.edu](mailto:adminops-procurement@fas.harvard.edu) for guidance if not using a Harvard template or other contract questions
- **Policy Guidance and Materials**
  - Contact [adminops-procurement@fas.harvard.edu](mailto:adminops-procurement@fas.harvard.edu) for general guidance. FAS HR or Finance may also consult with Financial Policy Office ([financialpolicy@harvard.edu](mailto:financialpolicy@harvard.edu)) Office of Labor & Employee Relations
  - Additional materials can be found at the [Financial Policy](#) website or [Human Resources Policies](#) website
  - A chart showing options to process payments for those that do not meet the IC test and are classified as employees as well as FAQs will be available by 7/1/19 on the above websites

2019NOV21 FAS  
Town Hall





# FY20/21 Administrative Landscape

**Mary Ann Bradley**

*Associate Dean for Administrative  
Operations*

# Thank you, FileShare Partners!

**Sarine Der  
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OEB &  
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**Kaitlyn  
Santa  
Lucia,**  
College

**Shannon  
Ingraham,**  
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**Jessica  
Gauchel,**  
Sociology

**Michelle  
Driscoll,**  
IMS

**Mary Ann  
Bradley &  
Maureen  
Berry,**  
Admin Ops

**Karen  
Barkow,**  
Statistics

**Paul Kelley  
& Kathleen  
McCloskey,**  
Earth &  
Planetary  
Sciences

**Damari  
Rosado &  
Maggie  
Lopes,**  
Economics

**HUIT  
Partners:**

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**Laurie  
Gamble**

**Michelle  
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**Chris  
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# Thank you, Electronic I-9 Pilot Partners!

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**Jenna Bellanoit,**  
DCE  
Finance

**Eimy Osaki,**  
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**Maria Lemus-Aguirre,**  
FAS HR

**Bob Daley,**  
FAS Payroll

**Jennifer Minery,**  
FAS Payroll

**Patty Jenkins,**  
FAS Payroll

**Gretchen Gingo,**  
HUIT HR  
Systems



# Thank you, Buy2Pay Partners!

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**Karen  
Rynne,**  
IMS &  
Music



# Thank you, Position Tracking & Reporting Partners!

**Jay Herlihy**

**Susa Duda**

**Chris Ciotti**

**Heather  
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**Carla  
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**Mary Ann  
Bradley**

**Kwok Yu**

**Pat  
Fitzgerald**

**Bob Daley**

**Gretchen  
Gingo**

**Mark  
Seibring**

**Kim Zweig**

**Jennifer  
Minery**

**Stephanie  
Nasson**







# Other Announcements

- **BCD Travel:**

- As of 12/31/19, ability to charge to 33 digit coding will be eliminated. Preparers and Approvers have been contacted via email with additional payment options.

- **Zoom:**

- Easy to use video conferencing tool
- FAS trainings scheduled for Jan – March 2020
- Available for use now - <https://harvard.zoom.us/>

- **Zelle:**

- Payment option available to individuals in the B2P Supplier Portal as of 10/16/19. Individuals with a US bank account and email address can choose [Zelle](#) as their preferred payment method in their Supplier Portal profile to receive electronic payment.

- **Admin Ops/ASAP Training opportunities:**

- Finance Fundamentals to kick off January 30, 2020!
- December and January training sessions available in HTP
- Monthly Drop Ins



# HR Update

**Atlas Team Members,**

**Kathy Santoro,**

*Director of Programs and Operations*

*FAS Human Resources*



# Administrator's Atlas

(Formerly DA Boot Camp)



**Elise Sacchetti, Jennifer Callahan,  
Jeanette Sanchez Kamieneski,  
Annie McGough**  
*FAS Human Resources*



# Administrator's Atlas – Update

## **Goal**

To ensure that all FAS administrators have access to the essential trainings and resources needed for their roles and that transitions into these roles are seamless and efficient.

## **Phase I**

Held focus groups and formed an FAS-wide committee of subject matter experts.

## **Phase II**

Created cross-functional menu of FAS (HUIT and HIO) resources available to all FAS Administrators.


## **Phase III**

Administrator's Atlas webpage went live on the FAS HR and Administrative Operations website. A contact person has been designated for each Functional Map for maintenance updates.



# Administrator's Atlas Website


<https://hr.fas.harvard.edu/department-administrator-resources>

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Faculty of Arts and Sciences  
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Orientation and Review  
Period

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Reclassification, and  
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Absence

FAS Staff Departure  
Information for Managers  
and Department  
Administrators

Resources for Managers

Administrator's Atlas

Functional Map for  
Administrative  
Operations

Functional Map for  
Faculty Affairs

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## Administrator's Atlas

New and changing systems, processes, and procedures are part of the FAS administrative landscape, and whether you are new to FAS or a long-time administrator, staying current in this area is critical.

These guides will provide you with a menu of the variety of resources available within the different functions within FAS. Use these functional maps to learn what resources and training are available and where they can be accessed.

Administrator Resources - Functional Maps

▸ Functional Map for Administrative Operations

▸ Functional Map for Faculty Affairs

▸ Functional Map for FAS Finance

▸ Functional Map for the Graduate School of Arts and Sciences (GSAS)

▸ Functional Map for Harvard College


▸ Functional Map for Harvard International Office

▸ Functional Map for Information Technology

▸ Functional Map for FAS Human Resources

▸ Functional Map for the Office of Physical Resources and Planning (OPRP)

▸ Functional Map for Research Administration Services (RAS)



Academic Calendar

[Academic Year 2018-2019](#)

Functions Based on Unit

Select an item

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# Update - Paid Family Medical Leave (PFML)

- All **existing** employees received a notice from Benefits on September 30, 2019 about the new Massachusetts law creating paid family medical leave effective January 1, 2021
- As part of this new law, all **new** employees (including LHTs and temps) must be notified of this benefit, and acknowledge receipt of the notification within 30 days from their hire date.
- FAS HR is working on a process that will provide and track all notifications and acknowledgements to new FAS hires.
- In the interim, FAS HR is providing notice to all new FAS employees on a bi-weekly basis.
- For more information about PFML, please contact Benefits.

## **Benefits Office**

114 Mt. Auburn Street, 4th floor

Call center: 617-496-4001

Email: [benefits@harvard.edu](mailto:benefits@harvard.edu)

Fax: 617-496-3000