Elisha Hamilton
Compliance Analyst

Ida Boeckstiegel
Compliance Analyst

Megan DeVeau
Assistant Director

Scott Koziol
Grant and Finance Director

Stephanie Nevin
Fiscal Manager

Charles Yim
Procurement Specialist

Candice Johnson
Reimbursement Specialist

Jimmy Zhou
Financial Manager

Frank Pichinini
Invoicing Specialist

Ahsan Farooq
Procurement Specialist

Alex Pang
Reimbursement Specialist

Elizabeth Lee
Grant Accounting Manager

Francisco Montano
Reimbursement Specialist
ENGINEERING SHARED ENVIRONMENT RESPONSIBILITIES

Fiscal Team
- Procurement (Handled by the Procurement Specialists)
  - Purchase Request Form
    - For general purchases either via procard or Workday
  - Purchase Order - Change or Close
    - To cancel a PO
    - To make changes to a PO
    - To close a PO
  - General Finance Help Request Form
    - To pay supplier invoices when a PO has not been created
    - To request a contract review
    - General help questions related to purchases
  - Credit Card Services Form
    - Requesting new procards
    - Requesting limit increases on procards

- Travel and Expense Reimbursements (Handled by the Reimbursement Specialists)
  - Non-Employee Payment Request Form
    - Reimbursement requests for non-UW employees
  - Non-Travel Reimbursement Request Form
    - Non-travel expense reimbursements for UW employees
  - Travel Spend Authorization & Reimbursement Request Form
    - Travel-related expense reimbursements for UW employees
  - General Finance Help Request Form
    - General help questions related to travel and non-travel expense reimbursements

- Compliance (Handled by the Compliance Analysts)
  - Travel expense reimbursement compliance
  - Expense reimbursement compliance
  - Non-UW employee reimbursement compliance
  - Procurement compliance
  - General help questions related to compliance

Financial Team
- Fund Transfers (Handled by the Finance Manager and Grant and Finance Director)
  - Funding Transfer Request Form
    - Funding transfers to include charging other UW entities for services you may have provided
    - Moving funds from the central receiving account to specific worktags
• Accounting Journal Entries: Post-Workday Non-Payroll Expense Transfers (Handled by the Finance Manager)
  ◦ Procurement Accounting/Worktag Adjustment Request Form -OR-
    ▪ Changing work tags on transactions within the same funding
  ◦ UW Academy Accounting Journal Entry Request Form
    ▪ Transfer of expenses from one work tag to another (changing funding)

• Accounting Journal Entries: Pre-Workday Payroll and Non-Payroll Expense Transfers (Handled by the Finance Manager)
  ◦ UW Academy Accounting Journal Entry Request Form
    ▪ Transfer of expenses from one work tag to another (changing funding)

• Customer Setup and Invoicing: Accounts Receivable (Handled by the Invoicing Specialist)
  ◦ General Finance Help Request Form
    ▪ To identify that you have an invoice that needs to be created
  ◦ Email Frank Pichanini, Jimmy Zhou, and Megan DeVeau to set up recurring customer invoices for payment

• Request New/Modify Worktags (Handled by the Grant and Finance Director)
  ◦ General Finance Help Request Form

• General Help (Handled by the Finance Manager)
  ◦ General Finance Help Request Form
    ▪ Help with any finance-related activities

Research Accounting Team
• Review Effort Reporting (Handled by the Research Accounting Manager)
  ◦ General Finance Help Request Form
    ▪ Review Effort Reporting for timeliness/compliance
    ▪ General questions

• Subawards and Invoicing (Handled by the Research Accounting Manager)
  ◦ General Finance Help Request Form
    ▪ Help with invoicing, receiving, and PO questions
    ▪ BPO/Subaward close-out questions
  ◦ ospsubs@uw.edu
    ▪ Changing subaward PO's
  ◦ Purchase Order - Change or Close
    ▪ To cancel a subaward PO
    ▪ To make close a subaward PO

• Award Close Out (Handled by the Research Accounting Manager)
  ◦ General Finance Help Request Form
• Reviewing award for final requirements

• General Help (Handled by the Research Accounting Manager)
  o General Finance Help Request Form
    ▪ General help with UW Connect
    ▪ General help with Workday

**Channels of Communication from the Engineering Shared Environment (ESE)**

**Meetings**
• Monday and Wednesday noon drop-in office hours (Through December 2023)
  o Time for individual WD process questions

• Monthly fiscal meeting beginning November 2023
  o WD announcements
  o Central office announcements
  o ESE updates
  o Compliance feedback and discussion
  o General questions

• Time on the agenda during monthly administrator meetings
  o ESE process updates and feedback announcements

**Email**
• **CCoreCoEfisc@uw.edu**
  o Ad hoc in the moment and urgent announcements
    ▪ Pass along central and WD information
  o Notification of upcoming meetings held by the ESE
• **Admins_plus@engr.washington.edu**
  o Ad hoc in the moment and urgent announcements
    ▪ Pass along central and WD information
  o Notification of upcoming meetings held by the ESE