## Upcoming Administrative Services Training

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>October 18</td>
<td>Website Content Management System</td>
</tr>
<tr>
<td>November 15</td>
<td>Classroom Technology Use</td>
</tr>
<tr>
<td>December 20</td>
<td>Blackboard &amp; other Library Resources</td>
</tr>
</tbody>
</table>

All session held on 3rd Wednesday of month at 9:00 in Room 323.
PCards

- Two types of credit cards are available in FY07:
  - PCard – university liability credit card
  - Travel & Entertainment – personal liability credit card
- PCards expire in November 2006.
- All card holders must reapply to maintain PCard.
- On-line training and quiz will be required. Card will not be distributed until applicant completes on-line requirements successfully.
- MSASS has chosen to continue using PCard for all expenses including travel and food.
PCard/T&E Card - Differences

PCard – University Liability Card
- Card holder does not pay bill and then request reimbursement.
- Receipts and Statements must be submitted on a timely basis.
- Inappropriate expenses will require repayment or payroll garnishment.

T&E Card – Personal Liability Card
- Card holder pays bill and requests and receives reimbursement upon receipt of all receipts and documentation.
- Reimbursement in the form of direct deposit within days of request.
- Provides increased control for School/Department/University due to ability to refuse reimbursement of inappropriate expenses.
- Travel and Food expenses have increased dramatically. Implementation of T&E card is to control these expenses.
PCard – Policies and Procedures

★ PCard holder is responsible for proper documentation and backup.
★ Admin Services maintains a file of all PCard backup.
  ✫ Convenience of card holder in case of an audit.
  ✫ Backup must be maintained for all operating and project accounts.
★ Receipts with proper documentation and statements must be submitted by the closing date of the PCard – currently the 3rd of the month.
★ If documentation is not complete, card holder will receive a warning.
★ If documentation is not complete by the next closing date, PCard will be revoked.
★ Documentation includes the following:
  ✫ Name
  ✫ Speedtype
  ✫ Purpose
  ✫ Account (expense class)
★ If PCard is cancelled, the University ERP system will need to be used for all purchases.
Catering

For all events with a cost of under $500, you may use the caterer of your choice provided they accept PCards.

For all events with a cost of over $500, you must use a caterer from the list of preferred caterers. The list includes on-campus and off-campus caterers.  
Case Dining Services

Submit/fax requisitions to Mary Luberger at 368-1096 for approval and processing. Provide appropriate copies and documentation to Administrative Services.
## Payment Requests for Non-Salary Expenses

### Payment Request Process Revisions
- A new online vendor form will be introduced October 2, 2006.
- The form will be completed online and information will be stored in a database.
- No printing necessary! – all vendor information will be electronically submitted directly to Accounts Payable.

### Benefit of Revisions
- The new form will provide an easier tracking method.
- Eliminates additional paperwork and signatures.
- Vendor information is stored electronically.

### New HCM / ERP Reimbursement Process
- Checks will no longer be issued to employees for reimbursements.
- Reimbursements will be direct deposited into your checking/savings account.
- Go to [https://hcm.case.edu](https://hcm.case.edu)
  - Click on the **Payroll and Compensation Home** hyperlink.
  - Click on the **Direct Deposit** hyperlink.
  - Employees direct deposit detail information should appear.
  - On the far right of the screen is a check box that reads: **A/P Reim.**
  - Verify which account (checking / savings) you want your reimbursement deposited.
  - Click Save.
Account Number Usage (expense class)

- 531400-Food Supplies
  Used for all food supplies EXCEPT for food purchases while traveling.
- 534300-Conferences & Seminars
  Used for all registration fees.
  SHOULD NOT be used for food supplies
- 534200-Travel – CWRU Employee & 534250-Travel – Trainee
  Used for all travel expenses including FOOD when traveling.
  Not to be used for registration and office supplies.
Shipping/Postage

Fed Ex Shipping
- When shipping item(s) using Fed Ex be sure to follow the appropriate directions.
- Enter all of the appropriate information into the Fed Ex Log Book located at the front desk.
- Fill out the appropriate form: US Domestic or International Airbill.
  - Enter the sender’s name and address information
  - Internal Billing Reference.
  - **REMEMBER TO ENTER THE SPEEDTYPE ON THE HIGHLIGHTED LINE.**
  - Recipient’s name and address
- Submit Sender’s Copy to Administrative Services.

UPS Ground Shipping
- When shipping items using UPS please be sure to follow the appropriate directions.
- Enter appropriate shipping information in the UPS logbook for tracking purposes.
- **REMEMBER TO ENTER YOU SPEEDTYPE ON THE REFERENCE LINE.**

Standard Mailings
- **REMEMBER TO ENTER YOU SPEEDTYPE ON THE REFERENCE LINE.**
Vacation Buy-Up and other Work Force Options

- All Vacation Buy-Up and other Work Force Options have been submitted, received, and implemented for the 2007 fiscal year.
- For those participating in a Work Force Option, letters were sent by HR confirming request.
- Vacation Buy-Up pay deductions started with July paychecks.
- Additional vacation time has been added to the system and you should see it on your time sheet.
- When using vacation time, both regular and buy-up time should be entered under TRC Code VAC.
- Buy-Up time will not be paid if employee terminates employment.
- Buy-up time must be used by June 30, 2007 or you loose it.

VACATION BUY-UP EXAMPLE:
- A non-exempt (7.5 hr/day) employee with 11 vacation days per year (82.5 hrs) who buys an additional 10 days (75.00 hrs), will have a total of 21 days (157.5 hrs).
- Remember that vacation time accumulates each month you work, therefore, vacation time available will change each month.
- The time entry history section within the HCM system is located right under the exception time sheet. Cumulative information in regards to your time is available here. Use the TRC drop box to pull up specific information.
Payment Request for Additional Pay

- A standard editable PDF form asking for all pertinent information for additional pay request has been created by HR.
- This form asks for
  - employee name
  - employee ID
  - purpose for the additional pay
  - duties that were performed requiring additional pay
  - date the assignment will be completed along with the anticipated pay date
  - if this interfered with regular assigned duties
  - project name and the speed type to be charged
  - supervisor information
- This form will need to be filled out for each employee who is to receive additional pay.
- Do not use terminology such as consultant. Preferred terminology includes presenter, workshop or special project.
- Although requests are reviewed and entered into the system by Administrative Services, HR reviews and gives final approval. Inappropriate terminology can cause requests to be delayed or denied. The process is similar to the ERP Payment Request E-Procurement.
- Please confirm with Administrative Services that additional pay is appropriate. Employee cannot receive additional pay for work related to current position.
Student Request and Referral Forms

- All requests for student employees are to be approved by Administrative Services prior to submission to Student Employment.
- Requests will be reviewed and signed for approval and auditing purposes.
- Administrative Services maintains a log of all student employees hired through Student Employment.
- Requests will be returned to requesting department.
- Referral forms should be signed by Administrative Services and the supervisor.
- Administrative Services should receive the yellow copy of the referral form and a copy of the request form for student payroll files.

Student Employees Time Entry and Supervisors Approval

- **IMPORTANT:** Supervisors are to enter all speedtypes on the student’s time pay sheets so that the correct projects/departments are charged. This helps to prevent avoidable journal corrections.
Independent Contractors @ Case

IF….. an independent contractor is appropriate for the task, the following steps need to be taken:

1. Fill out the independent contractor information form completely.
   Independent Contractor Form

2. Check PeopleSoft to find out if the service provider is already an existing vendor. If they are not, then provide both a completed supplier form and IRS form W-9.
   a. Supplier Form
   b. IRS Form W-9
Independent Contractors @ Case

- The University has modified its payment terms for standard vendors from Net 30 to Net 45 days.
- Non-Case individuals paid on a "Payment Request" will move from "Pay Immediate" to Net 10 days.

  The additional days added to the issuance of the check enables the university to retain its funds and draw interest on those funds for this extended time period.

- Minority owned businesses, female owned businesses and others classified as small business enterprises will remain at a Net 10 day pay.

  Invoices are paid based on the date of the invoice.
Poster Printing@ MSASS

- Completed Posters and a Poster Printing Request form need to be delivered to Manager of Research and Training. This can be done either by e-mail (richard.cole@case.edu) or in person on a re-writable CD, USB Key or 3.5” floppy to Richard Cole in Rm 210B (368.5141).
- The poster will be proofed, and any needed modifications will be reported back to the authors.
- Proofs (on 8.5”x14”) are available if requested.
- Once final approval for Printing has been given, the Poster will be printed by the IT office.
- Authors will be notified that the Printed Poster will be available for pick-up from Rm 210
**COST.** The cost for a standard poster (42”x 60”) is $60 to cover the cost of paper, ink and plotter maintenance. Smaller/larger poster printing costs will be pro-rated. Posters with a dense ink coverage will be priced individually. Speedtypes are required at the time of printing request – if a speedtype is not available, printing requests will be considered on a case-by-case basis depending upon availability of funds.

**Turn-a-round Time.** Requests for poster printing need to be submitted **five** working days before desired delivery. Every effort is made to print the poster same-day, but often there are problems and issues that need to clarified and resolved. Before a conference e.g. SSWR and CSWE, it is advisable to request printing **at least ten days** before desired delivery.
Updates to the Website

- Updated Navigation
- New User-Focused Sections
- Mandel Spotlight
- Research Showcase
- News Section
- Events Section
- Search MSASS features
## Updated Calendaring System

- Completely Revised
- Combined Calendars
- Added Search Feature
- Mini-Cals for navigation
- Centralized Booking links
- Categorized bookings
- Flexible for future

### MANDEL SCHOOL OF APPLIED SOCIAL SCIENCES

**Wednesday 13 September 2006**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>8:00am</td>
<td>SSW 565 Community Based Practice with Children &amp; Families (Williams)</td>
</tr>
<tr>
<td></td>
<td>SSBT 535 Human Sexuality (Anderson)</td>
</tr>
<tr>
<td></td>
<td>SSBT 528 Child Abuse (Blacks)</td>
</tr>
<tr>
<td></td>
<td>Field Education Colloquium For Advanced Standing Students (Hristina)</td>
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<tr>
<td></td>
<td>Field Education Colloquium For Advanced Standing Students (Hristina)</td>
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<tr>
<td>9:00am</td>
<td>SSBT 520 Family Systems Theories (McGeorge)</td>
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<td>SASS 595 SASS 590 Adoption Practice &amp; Policy (Griesea)</td>
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<tr>
<td></td>
<td>SSW 541 Child Sexual Abuse (Davies)</td>
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<td>SSBT 516 Adult Psychopathology (William)</td>
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<tr>
<td></td>
<td>SSBT 518 Adult Psychopathology (William)</td>
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<tr>
<td>10:00am</td>
<td>SASS 590 Youth &amp; Community Violence (Freiberg)</td>
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<tr>
<td></td>
<td>SASS 580 Youth &amp; Community Violence (Freiberg)</td>
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<tr>
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<td>American Red Cross Disaster Relief</td>
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Interview Rooms

- MSASS has three Interview Rooms. In addition to room 325, two have been added off the Student Lounge in rooms 145 and 146. All rooms include recording equipment.
- Bookings are only by done by faculty or staff and approved thru MSASS IT. However, the rooms will be used by students for class requirements once they have undergone training.
- Training will be required, for all staff, faculty, and students, and are currently planned for November, in addition to class specific trainings.
Recycling

Recycling is beneficial to the environment, the University, and the School.

😊 Trash is an expense to the University.
😊 Recycling is income to the University.

Please recycle paper products, glass, plastic, and aluminum.