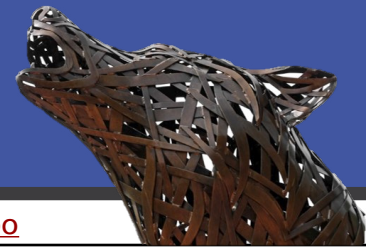


CALS Business Operations NEWSLETTER



Broughton Hall | Campus Box 7644 | 919-515-4226 | go.ncsu.edu/cbo

Accounting Services

Shop the Marketplace First Reminders

As we continue our effort to meet the university's initiative to shop the MarketPlace first, please continue to search the MarketPlace for supply purchases. The university now requires supply purchases less than \$250 to be made through the MarketPlace system, whenever possible. If you are submitting a voucher request for supply purchases totaling \$250 or less, you will be asked to provide justification for why the purchase could not have been made through MarketPlace or with a PCard.

If your program routinely uses the same vendor for the same type of purchase and spends over \$5,000 annually, contact your [Business Liaison](#) to see if a blanket purchase order is appropriate.

For more information about Shop the MarketPlace First, please visit: <http://harvest.cals.ncsu.edu/site/WebFile/shop-the-marketplace-first.pdf>.

Purchase Authorization System Update

The CALS Purchase Authorization system has been upgraded to include the use of MarketPlace.

Expiring PCards

Cardholders with PCards that expire on 11/17 are good through 11/30/2017. The CBO will receive the new cards for cardholders by the 2nd week of November from the University Materials Management office. Cardholders with expiring cards will receive an email from cals_cbo_pcard@ncsu.edu with dates, times, and the location they can go to pick up their new cards. Cardholders should bring their expired card and ID with them. Please check your cards expiration date and be on the lookout for an email the week of November 13. If you do not receive an email by November 20, please reach out to your [Business Liaison](#).

Update to ServiceNow Document Intake System

The CBO document intake system within ServiceNow has been upgraded for greater functionality. Each transaction type now has an individual link to ensure the document is routed to the correct team and includes the required information for each transaction. Additionally, the following two items were added to the Wolf Copier/Minolta Scanner: CBO_REQ (for requisitions) and CBO BILLING (for internal and external billing).

Submit Documents

- [Voucher/Invoice](#)
- [Pcard/WEX Requests](#)
- [Travel Requests](#)
- [JV/IDJ Requests](#)
- [Billing Requests](#)
- [Requisition Requests](#)

Receiving MarketPlace Orders

Marketplace offers faculty and staff a convenient and discounted option to purchase goods and services. One important action that finalizes purchases and keeps us compliant with the university's regulations is marking purchases received in the system. Please work with your business coordinator or liaison to review your purchase history and complete any pending receiving reports. You may have noticed emails requesting action on past purchases; please take a moment to receive all orders that have been delivered.

Amazon Now Offers Free Shipping

Good news – the NCSU MarketPlace Amazon site now offers free shipping on purchases through our business prime discount. If shipping fees were keeping you from using Amazon on MarketPlace, please reconsider this option for your purchasing needs. Remember, Amazon prime membership fees should not be paid with NC State funds and PCards should not be used for Amazon purchases.

CALS Internal Budget Spreadsheet

The CALS Pre-Award Office utilizes an internal budget spreadsheet as part of their review process. To assist departments, faculty, and students, this same template is available on CALS Pre-Award Services webpage and includes, on the first tab, links to current fringe, current IDC, and budget guidelines and also some explanatory notes. It can be accessed on the CBO website at www.go.ncsu.edu/cbo (under the Business Units tab select Contracts & Grants then Pre-Award Services) or by visiting the following link: <http://harvest.cals.ncsu.edu/site/WebFile/budget-work-up-with-summary.xlsx>. We recommend the utilization of this template, if possible, to help streamline the review process.

NCSU Tax Exemption in Regards to Proposals

Please contact CALS Pre-Award office at cals_preaward@ncsu.edu prior to preparing a proposal, if the proposal instructions, program announcement, RFP, or similar, mentions tax exemption, 501(c)(3), or similar language. Typically, this can be mentioned as part of eligibility and/or a requirement to submit a proposal and/or receive an award. CALS Pre-Award can assist in confirming NCSU is eligible for the opportunity. For additional information, please refer to the SPARCS' information page next to the line "Tax Exemption Number" at <https://research.ncsu.edu/sparcs/proposals/proposals-ids/>. Please contact CALS Pre-Award with any questions.

Helpful Tip: What is Participant Support?

Participant support costs are those costs paid to (or on behalf of) participants in meetings, conferences, symposia, training activities, workshops and similar events. When Sponsor (federal or non-federal agency) funds a project aimed at supporting outreach programs to bring experts together to discuss research or education findings or to expose other researchers or students to new research and education techniques, the funding provided by the sponsor may include this category of expenses.

Participant support costs may include costs of transportation or travel allowance, per diem, manuals and supplies (only those directly attributable to individual participants), tuition and stipends, publication and other related costs for participants or trainees. Uniform Guidance regulations do not allow indirect costs to be charged on participant support costs.

Learn more about Participant Support at: <https://research.ncsu.edu/sparcs/budgeting-guidelines/budgeting-participant-support/>.

Budgets & Planning

Clarification of Salary Release Process

The CBO has received a number of inquiries related to the salary release process. To clarify the process, once a faculty or staff member has moved off of their base salary allocation to a grant or other form of non-appropriated funding, the department can request salary release for that individual. In this case, you would need to reach out to the [budget office staff](#) assigned to your organization to request the transfer of funds. The budget office will validate the change and allocate the salary release based on pre-determined departmental policies. If you have any questions or concerns please reach out to your contact in the Budget Office.

Salary Distribution Change (SDC) Schedule

Beginning with the November payroll cycle the CBO Budget Office will abide by the campus lockout date listed on the university payroll calendar when it comes to the processing of Salary Distribution Change (SDC) requests. This means that submissions will need to be received a couple of days earlier than historically required. The link to the university calendar is not currently available, but the next deadlines for monthly employees are 5 p.m. on November 13, December 7 and January 16. The deadlines for bi-weekly employees are November 9 & 21, December 7 & 15, and January 4 & 16. If the university doesn't have a viable link by January, please reach out to the Budget Office and we will provide you with a hard copy calendar for FY18. This change is necessitated by the overwhelming influx of SDC requests after University lockout that requires considerable time and effort on the part of CBO staff. If you have any questions or concerns please reach out to Barb Amos at barb_amos@ncsu.edu or LaTonya Scott at lmscott2@ncsu.edu.

Farewell to Accounting Services Manager, Sheree Avent

We extend a fond farewell and congratulations to Sheree Avent, Accounting Services Manager, who has accepted a position with the University of Maryland. Sheree came to CALS in November 2008 when hired as Accounting Technician with Plant Pathology. Sheree moved to the University Contracts and Grants as an accountant in April 2010. She returned to CALS in September 2012 where she joined the College Business Office and was then promoted to her current role of Accounting Services Manager.

Sheree's last day will be Friday, November 17. Please join us in Conference Room 3172 of Broughton Hall on Wednesday, November 15 between 3:30 - 4:30 p.m. to recognize Sheree's contributions to CALS. Light refreshments will be served.

New Staff and Roles

We are pleased to welcome Katie Kleinknecht as CALS' newest Budget Consultant. Katie joins us from NC State's Office of the Treasurer. Prior to NC State, Katie worked as a financial analyst for American Signature for five years. Katie brings a wealth of knowledge to the CALS Budget Office and we are pleased to have her join our team.

We are also happy to welcome new Post Award Consultant, Danae Love, to the Contracts & Grants Post Award Team. Danae previously served on the Pre-Award Team and is filling the post award position previously occupied by Marthy Purcell. She will be managing the portfolio of projects assigned to Animal Systems. Please join us in welcoming Danae to her new role.

Farewells and Vacancies

Business Liaison, Brenda Gunnell, has accepted a position with the College of Humanities and Social Sciences (CHASS) here at NC State. Brenda has worked in the CBO for nearly five years serving both on the Accounting Services and Business Liaison teams. She has been an integral part of the CBO and will be greatly missed. Please join us in wishing her well in her new endeavors.

CALS Contracts and Grants is working to fill a vacancy on the Pre-Award team. Additionally, we are expecting to have the remaining vacancies in the Accounting Services unit filled in the near future.

CBO Stats

ServiceNow Monthly Stats

| Accounting Services Transactions Processed by Type | | |
|--|-----------------|--------------|
| Affected CI | 6 Month Average | Oct-17 |
| JV/IDJ | 95 | 71 |
| PCard | 1,160 | 231 |
| Voucher/Invoice | 1,379 | 1,122 |
| Total | 2,634 | 1,424 |

CALS Invoices Paid / Travel Processing

| | 6 Month Average | Sept-17 |
|-------------------------------------|-----------------|---------|
| Invoices Paid | 1,262 | 1,090 |
| % of Invoices Paid w/in 30 days | 85% | 82% |
| Travel Claims Paid | 1,013 | 996 |
| Travel Processing Time (Total Days) | 19 | 18 |

Performance Ranges per University Standards

| Performance Ranges | % Invoices Pd w/ in 30 Days | Travel (Total Avg of Elapsed Days) |
|--------------------|-----------------------------|------------------------------------|
| Acceptable | 88% - 100% | 30 |
| Marginal | 87% - 81% | >30<45 |
| Outside Acceptable | 80% and Below | 45 |



Provide your feedback about the CBO at: go.ncsu.edu/cbofeedback



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