BME Lab Staff Meeting

11/9/12

University of Minnesota
Welcome!

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- General Office Information
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- Justification Standards
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- Technology Support
- Lab/Office Security Update
- Questions???
Office Staff Introductions and Roles

- Jessica Baltzley, Undergraduate Program Asst and Advisor
  - bmedus@umn.edu or 612-626-3446

- Elizabeth Hedin, Preaward Coordinator
  - hedi0022@umn.edu or 612-625-6141

- Rachel Jorgenson, Graduate Program Asst and Advisor
  - bmengp@umn.edu or 612-624-8396
Office Staff Introductions and Roles

• Sheila Jurgens, Accountant
  – jurge031@umn.edu or 612-626-3332

• Katherine Lindsay, Administrator
  – linds059@umn.edu or 612-626-6226

• Marly Melsh, Front Desk Office Assistant
  – mnmelsh@umn.edu or 612-624-4507
Student Worker Office Staff

• Katie Dunford

• McCartney Goff

• Kelsey Merten
General Office Information

- Official office hours are Monday-Friday, 8:00 am-4:30 pm.
- U-Card access is required to enter the office area
  - on weekends/holidays
  - on weekdays/working days before 7:30 am and after 5:00 pm.
- Mailboxes
  - Faculty and department staff mailboxes are across from the front desk area, to the left of the sink.
  - Graduate student and post-doc mailboxes are to the right of the drinking fountain.
  - There is also a mailbox for every lab. Lab staff who are not BME grad students or post-docs should check the mailbox designated to their lab for incoming mail.
- Shipments
  - The department has accounts with FedEx and UPS.
  - If your lab needs to ship something (e.g., equipment being returned for repair, posters for a conference, etc.), see Marly Melsh.
  - There is a Outgoing Shipment Information Worksheet (PDF, 87KB) that needs to be filled out in order to ship items on the department account.
Administrative Forms

- You can find these forms at: [http://bme.umn.edu/adminforms/](http://bme.umn.edu/adminforms/)
  - Reimbursement Requests
  - Supply/Equipment Order Forms
  - Department Letterhead
  - Shipment Form
  - Timesheets
Office Bins

There are four bins in the office (above the graduate student mailboxes):

1. **Order**: Place new orders, make sure it is all filled out and there’s a signature for orders above $100

2. **Packing Slips**: when you receive an order, turn in the packing slips. If everything in the order is in **good condition**. This shows us that you are okay with us paying the vendor. If there are **any issues** with the order, See Marly, **do not turn in the packing slip**.

3. **Reimbursements**: Place to turn in all reimbursements

4. **Pcard**: This is where the justification form and receipts for faculty PCard can be turned in.

Problems? Check with Marly
Grant Application Process

• Send link to program announcement to Elizabeth Hedin at hedi0022@umn.edu 3 weeks or more before due date.

• Proposals are created in the department and sent to Sponsored Projects Administration (SPA) for review and submission to the agency.

• Internal SPA deadlines:
  – Most NIH grants: 5 business days before NIH’s deadline
  – Most non-NIH grants: 24 hours before agency’s deadline
How is the University Funded?

- Federal Government
- State Government
- Sponsored Research
- Grants
- Donations
- Tuition
What does this mean? . . . .

- Every dollar comes with restrictions and guidelines; which is dependent upon the source & designated purpose.
  - (A lot of rules!)
- Our purchases are subject to public scrutiny
  - (We’re giving them taxpayer money for what?!?)

The University requires thorough justifications and documentation for every purchase to ensure compliance and provide evidence of compliance during an audit.

Auditors are financial professionals from outside the University. They will not be familiar with the University, your department, or your research. They will not make assumptions or dig for information. It all needs to be spelled out and clear.
COSTLY MISTAKES: Florida State University audit

Out of $10.6-million in federal research grants, auditors disallowed nearly $3-million, which the federal government is demanding that the University repay.

In all, auditors sampled 200 transactions and concluded that 92 of them, totaling $302,000, were inappropriate. But then federal regulators applied those findings to the nearly $11-million from which the samples were taken and—as they are permitted to do—estimated that university researchers had misspent nearly $3-million.
Example 1:
Jay Lee, graduate research assistant in May’s lab, traveled to Paris France from 10/15/12-10/19/12 to attend the Sickle Cell Disease Association of America (SCDAA) International Conference. There Jay presented Hemodynamic Predictors of Mortality in Adults with Sickle Cell Disease; which are research results from his work on May’s project ‘Complications in adult patients with Sickle Cell Disease’.

1) Have I answered all the questions?
2) Does this pass the Joe Shmoe test?
3) Do I have enough information to ensure I’m in compliance with funding restrictions/guidelines?
Keep Calm and GAME ON

You have to learn
The rules of the Game.
Then you have to play it
Better than anyone else.
-Albert Einstein
Travel/Reimbursement Procedures

• Complete Employee Expense Worksheet (SEE example)
  – Include personal information, justification, lines for each day of travel, account string to be charged, signatures
    • Justification must include:
      – Who is traveling?
      – What is the purpose of the travel?
      – Where and when did the travel take place?
      – How does the travel benefit the account/project being charged?
      – (Title of presentation at professional conference.)

• Attach ORIGINAL receipts and copy of abstract
  – Request actual amount up to per diem for food
    • No receipts (http://www.gsa.gov)
    • Partial meal rates for arrival/departure dates will be applied.
  – Receipts required for non-food purchases costing $25 and more

• Submit form and receipts in “Reimbursements” basket in 7-105 NHH
  – Incomplete forms (justifications, signatures, budget information) /missing receipts will delay the processing time.
  – Hospitality / Group meals require RECEIPTS
Pre-Register Travel

Travelers to international destinations for University business must pre-register their trip information

- Ability to deploy resources should a crisis in-country occur (e.g., natural disaster, terrorist attack, political unrest)
- Assist travelers with pre-travel preparation

http://global.umn.edu/travelregistry/
Travel/Reimbursement Policy

- An individual traveling on University business should neither gain nor lose personal funds as a result of that travel.

- Travelers are expected to choose the least costly method of transportation and lodging that also meets their scheduling needs. *(exception: Fly America Act)*

- Use of the University's preferred travel agencies and vendors is recommended as cost effective and convenient. CLIQBOOK

- Employee reimbursements must be University business-related and clearly indicate prudent use of public funds.
**Important Travel Policies**

- **Fly America Act**
  - American-based airlines are required for travel on sponsored Federal funds otherwise they will not reimburse the airfare regardless of cost.
    - Exception is “Open Skies Agreement”; which allows use of European Union airlines.
    - When in doubt, FLY AMERICA!

- **Taking Extra days or trips**
  - Need supervisor approval for extra days/trips on top of University Business travel
  - Comparison Flight cost documentation is *required* in order to show what flight would have cost if you hadn’t deviated from original travel plans.
  - Both actual flight cost & comparison flight cost documentation need to be attached to expense reimbursement. You will be reimbursed for the lesser of the actual flight or comparison flight.
Travel Policy – Per Diem Rates

Lodging rates:
Maximum of 150% of the lodging rates provided
GSA (Domestic)  http://www.gsa.gov/portal/category/21287
DoD Center (International) http://www.defensetravel.dod.mil/site/perdiemCalc.cfm
**Itemized Receipts are required

Meal rates:
Automatic 75% per diem rate on 1st and last day of travel regardless of departure/arrival times.
GSA (Domestic)  http://www.gsa.gov/portal/category/21287
DoD Center (International) http://www.defensetravel.dod.mil/site/perdiemCalc.cfm
**Each individual meal must be within per diem threshold guidelines.
Other Reimbursement Policies

• 20% Max gratuity policy (meals, cab fare, etc.)
• Alcohol is not a reimbursable expense
• All Receipts must be itemized
  • (list individual expenses)
• Reimbursements are due within 30 days of trip
  • No guarantee expenses will be reimbursed if turned in after deadline
• We do not reimburse expenses that have been or will be paid/reimbursed by another source.
• Amounts above per diem rates or out of compliance with policy are NOT reimbursable.
• Please direct questions to Marly Melsh. Questions are encouraged prior to the transaction.
Tax Exempt Status

- The University of Minnesota has a very broad sales tax exemption covering most purchases.
  - Exceptions include: prepared food, candy, soft drinks, lodging, motor vehicles, and solid waste disposal services.
- If the University is directly paying for the purchase, no sales tax should be charged.
  - Direct payments include following the department ordering process or using a Purchasing Card.
- If an individual uses a personal credit card or funds for a purchase and then requests reimbursement, it is not considered a University purchase for sales tax purposes and exemption should NOT be requested at time of purchase.
  - Penalties include at least $100 per transaction.
Supply/Equipment Order Process

• Supply order process/form online at:
  – TECH MART

• Equipment orders
  – Capital assets
    • Equipment worth $2,500 or more
    • Requires thorough justification to place order
    • Requires extra information before invoice can be paid
    • Life is longer than 1 year
  – Fabrication of capital assets
    • Components that add up to $2,500 or more
    • Components that will be added to existing equipment that cost $2,500 or more
    • Check fabrication box on order form; you will be contacted for further information
Room Reservation Process

• BME does *not* control any conference or meeting space in the building!

• To reserve a room, contact Marly Melsh with the following information:
  – Meeting title
  – Start/end dates (if a weekly/recurring meeting)
  – Start/end times
  – Preferred room AND acceptable alternatives
  – Contact information

• Staff will then submit a reservation request to the 3rd floor NHH info desk staff, who will check on room availability and assign a space for the meeting.

• Building space is in very high demand, so submit reservation requests as much in advance as possible.
Office Equipment Usage

• The copier and printer are located in the cubicle next to the front desk area.

• A code is required for every copy job on the copier.
  – Each lab has a unique copy code.
  – All copies made for BMEn courses share a code.

• There is a scanning function available on the copier. See BME front desk staff if you would like to scan a document.

• All jobs printed on the color printer must be logged and will be charged to a valid EFS account string. The log sheet is on a clipboard hanging by the color printer.

• If the copier jams or there are other technical issues with any piece of office equipment, please notify BME front desk staff immediately.
Equipment Reservation Process
Laptop/Projector

• The department has one laptop and two projectors to loan to students, staff, and faculty in the BME department.

• Contact the BME front desk staff to check on equipment availability and/or reserve equipment.

• When submitting a reservation request, be sure to include the room number where the equipment will be used.

• Return equipment *promptly* at the end of your scheduled time.

• After-hours use of equipment:
  – If front desk staff are not available, return equipment to Elizabeth, Jessica, Rachel, or Katherine, so that they can lock it in the equipment cabinet.
  – If no office staff are available, the PI in charge of the meeting should lock the equipment in her/his office AND notify Marly of its location via email.
Technology Support

• Ethernet Jack Activation
  – Email Katherine (linds059@umn.edu) with complete jack number and non-sponsored EFS account to charge.

• Compliance-related IT Issues
  – Active Directory, Inventory, high-risk apps, malware
  – Contact bmehelp@umn.edu.

• All Other IT Issues
  – Contact the University’s Technology Help service
  – http://www.oit.umn.edu/help
Technology Support

- BME IT Support Wiki: https://wiki.umn.edu/BMEITSupport/
  - Includes:
    - Quick start guide for technology information
    - Information on UMN Active Directory
    - Software available to BME computers
    - How to access the BME Installers share
    - Other tech related articles
Technology Support

• Matlab Software – CSE License
  – Can be installed on all BME owned computers.
  – Available through the BME Installers network share
    • `\files.umn.edu\bme\installers`
  – Contact BME IT ([bmehelp@umn.edu](mailto:bmehelp@umn.edu)) for additional help.

• For all other software needs, go to [http://www.oit.umn.edu/utools/](http://www.oit.umn.edu/utools/).
• Active Directory:
  – If a computer is running Windows and is online, it needs to be joined to the University’s Active Directory
  – Please contact bmehelp@umn.edu when you receive a new Windows computer that will be online
  – More information on the wiki:
    • https://wiki.umn.edu/BMEITSupport/ActiveDirectory
Technology Support

- Daniel McDonald
  - BME IT Support contact
Lab/Office Security Update

• Each person entering the lab area should use their own UCard to do so.
  – Office staff will not swipe someone in to the lab area. Instead, office staff will call the lab and a lab member can escort that person to the lab area.

• Secure all personal belongings and special lab supplies/equipment in available lockable cabinets in lab space.
  – Report any lost or stolen items to Katherine Lindsay.
  – BME and AHC not responsible for lost or stolen items.

• Access during non-regular business hours.
  – Be sure to accompany guests at all times.
  – Do not allow unauthorized individuals access to secure spaces.
  – Call 911 in case of emergency.
Lab/Office Security Continued…

• Domestic/Animal Rights Terrorism

• Maintain awareness of your areas, including people, vehicles, and anything that seems out of place or suspicious. You know better than anyone what is day-to-day normal and what isn’t, so when something seems off, report it.
Lab Safety Reminders

- No food or drink in lab area
- Wear personal protective equipment (PPE) where necessary (no shorts, open toe shoes in lab)
- Handle sharps
- Chemical storage, labeling, waste management
- Eye washer/emergency showers
- Fume hoods
- Training
Would this lab pass?
What problems do you see?
Questions???

• Thank you!