EAS Procedures Overview

EAS Administrative Staff

Alison Ackie-Morain, Administrative Manager amorain@gatech.edu: Human Resources and Faculty Affairs. Hiring (including post-docs and unpaid visiting scholars), promotion and tenure, visas

Stacey Bass, Grants Administrator Lead stacey.bass@ap.gatech.edu: Research grant preparation and submission.

Belal ElNaggar, Faculty Support Coordinator belnaggar3@gatech.edu: Purchasing (invoice payments, Pcard purchases), office equipment, assistance with travel arrangements.

Shelley Ellis, Lecturers sellis39@gatech.edu: Coordinates Undergraduate Labs.

Daniela Estrada, Program Support Coordinator, daniela.estrada@eas.gatech.edu: Support the Cobb group.

Meg Grantham, Lecturer meg.grantham@eas.gatech.edu: Lab Safety requirements (teaching and research), teaching labs.

Natasha Hackley-Lawson, Faculty Support Coordinator natasha.lawson@eas.gatech.edu: Visitors (travel arrangement, re-imbursement), department seminar and reception logistics, office assignment/keys.

Zachary Handlos, Academic Professional zachary.handlos@eas.gatech.edu: Undergraduate advising, degree program assessment, outreach and undergraduate research programs.

Danny Hardwar, IT Support Engineer (ARCS) danny.hardwar@arcs.gatech.edu: Helpdesk support for hardware software, Standard Purchasing, Research Computer Support, AV Conference Room assistance.

Aria Higgins, Academic Program Manager I, ahiggins36@gatech.edu: Graduate Student Issue.

Greg Huey, Chair greg.huey@eas.gatech.edu: Start-up, space, and other resources. Promotion and tenure. Teaching assignments.

Jean Lynch-Stieglitz, Associate Chair jean@eas.gatch.edu: Mentoring, promotion and tenure.

Andy Newman, Director of Undergraduate Studies anewman@gatech.edu: Undergraduate degree program, academic integrity and disputes involving undergraduates.

Nguyen, IT Support Engineer Lead (ARCS) nguyen@gatech.edu: Linux support, Server support, Pace support, and Specialty Purchasing and High-Performance Computer Configuration.

Martial Taillefert, Director of Graduate Studies martial.taillefert@eas.gatech.edu: Graduate degree program, academic requirements for graduate students, issues between graduate students and advisors.

Christopher Thomas, Financial Manager Christopher.thomas@eas.gatech.edu: All things related to budgeting, funding, and expenditures, including policy and processes.

Casey Whitt, Financial Admin III casey.whitt@eas.gatech.edu: Financial Processes and policies, Travel Policy related inquiries.

Samantha Wilson, Academic Professional samantha.wilson@eas.gatech.edu: Undergraduate advising, curriculum, textbook orders, class scheduling, TA assignments.
Faculty Related Information

Facilities

Who do I contact about lab renovations?
Contact Juan Archila (juan.archilla@cos.gatech.edu)

Who do I contact about office renovations and furniture?
Contact EAS Admin. Manager (Alison AckieMorain: amorain@gatech.edu)

Grant Proposals

Where do I get information I need for developing a proposal budget?
The department has a budget template that can be used for developing a proposal budget. The template is updated with new rate information and distributed to faculty by mid-July in each year, but Stacey Bass and/or Christopher Thomas can provide it at any time.

Fringe benefit & indirect cost rates can be found here

How does proposal routing work?
Routing is done electronically via this system: https://erouting.gatech.edu/erouting/home For the routing, you’ll need a draft of the budget, budget justification, and proposal narrative/summary. Within the routing form, you will provide general information about the proposal, as well as answer questions about compliance issues (including export control, human & animal subject involvement, and environmental health & safety oversight) and conflicts of interest.

Proposal routing should be completed as soon as possible, but no later than 2-3 business days prior to the submission deadline.

Who should I notify if I plan to submit a proposal and how much advanced notice is necessary?
Within the department, you should notify Stacey Bass, Grants Administrator Lead (stacey.bass@ap.gatech.edu) as soon as possible – she will help coordinate notifications to the Office of Sponsored Programs (OSP), as well as any other offices that should be made aware of the submission. Proposals should be complete and submitted to OSP 2-3 business days prior to the submission deadline.

What can Stacey help me with?
Stacey can help with all aspects of proposal preparation, including budget development, proposal review and set-up in submission systems, coordinating materials with subaward institutions, and eRouting form submission.

How can I develop an outreach or educational component for a grant’s broader impacts?
If you want to reach children or high school students, it is often best to work with the professionals over in CEISMC (https://www.ceismc.gatech.edu). Faculty in EAS have often participated in the GIFT program which reaches high school teachers and students. Bonnie Harris is over the GIFT Program. Christopher Thomas previously worked with CEISMC and is a great resource.

Review and Tenure

What will I need to provide for critical review and tenure evaluation?
Currently, you are asked to provide a short biographic sketch, full c.v. in Georgia Tech format, summary of student course surveys (Item 10), and a statement of your accomplishments in research, teaching and service. For the tenure review you will also be asked to provide a list of suggestions for supporting letters from researchers at other institutions.

The Critical Review occurs in the 3rd year and you will need to provide the required documents to Alison by the middle of the fall semester of your 3rd year. The evaluation for tenure can occur in the 5th year and must occur in the 6th year. In either case, the required documents are due to Alison early in the summer of (May/June) preceding the 5th or 6th academic year. If a candidate is approved for an extension to the tenure probationary period (up to two are allowed), this will push back the required year of review.
You and the Chair will decide which timeline is most appropriate. If you come in with prior service credit towards tenure in your offer letter, these timelines may be different. You will have the opportunity to update your c.v. throughout the process if there are major changes (big grant funded, new papers published, etc.)

**Under what circumstances can the timeline be extended?**
The probationary period can be extended by one year due to a Family Medical Event (including childbirth). It can be extended up to 2 times for 2 separate events. [https://faculty.gatech.edu/sites/default/files/documents/exten_prob_0.pdf](https://faculty.gatech.edu/sites/default/files/documents/exten_prob_0.pdf). Pre-tenure faculty with appointments in the 2019-2020 Academic Year are allowed to take a 1-year extension due to the COVID-19 crisis. It is not clear yet whether such an extension will be offered to those starting in AY2020-2021.

**How much service should I do?**
All faculty members are expected to perform service for the department. However, the expected load for Assistant professors is lighter, reflecting the fact their focus should be on building their research and teaching profile. In general, you will not be expected to take on major responsibilities such as chairing a committee.

**Where can I get more information about the review and tenure process?**
COS Faculty Resources Link  
Faculty Affairs Link

**How do I check how much money I have left on my accounts (start-up, funded grants)?**
See Funding Reports Section Below

**Salary and Benefits**

**How does summer salary work?**
Tenure-track faculty are paid a 9-month salary over the period of 10 months (August-May). You can earn three additional months from your grants or start-up resources but be aware that funding agencies may have restrictions. For example, NSF will pay for no more than 2 summer months. In the spring, Christopher Thomas will send out an email asking which accounts should be charged.

**Where can I view and change my payroll information, benefits, retirement plans, W-2, etc.?**
At OneUSG Connect (access from techworks.gatech.edu or oneusgconnect.usg.edu)

**Students, Postdocs and other lab personnel**

**How do I hire a post-doc or lab technician?**
The hiring of postdocs, research scientists and lab technicians are handled by the Admin. Manager (Alison AckieMorain). To initiate the hiring process, send an email to Alison who will work with you to process the hiring.

**VISA/Lead-time**
Obtaining a visa is part of the hiring process. Lead time for all hiring is approximately 6 months in advance of the anticipated start date.

**How does it work to have undergrads in the lab?**
Undergrads can either work in the lab for pay (can just help out) or for credit (usually with some sort of paper or presentation as a final product). Contact Christopher Thomas to set up an undergraduate researcher to be paid, and Sam to create a registration permit for credit. For more information, including funding opportunities for undergraduate research: [https://eas.gatech.edu/undergrad/undergraduate-research-eas](https://eas.gatech.edu/undergrad/undergraduate-research-eas) [http://www.undergradresearch.gatech.edu](http://www.undergradresearch.gatech.edu)

**What safety training is required?**
All persons working in labs are required to complete Right-to-Know and Lab Safety 101 training. Additional training may be necessary for some lab environments. EHS Training can be accessed [here](https://eas.gatech.edu/undergrad/undergraduate-research-eas) [http://www.undergradresearch.gatech.edu](http://www.undergradresearch.gatech.edu)

**Can I get a TA position for my student?**
Your student will need to let Samantha know in the previous semester that they are interested in being a TA (she usually sends an email). While the number of TA positions are limited, supporting students in good standing and early career faculty advisors is prioritized.
How do I reserve a room for my group meeting?
Use the tool on http://www.admin.eas.gatech.edu/home or send a request to one of the Faculty Support Coordinators (FSC)

Teaching

How much can I expect to teach?
Your teaching obligations are stated in your offer letter. In the past, we have often been able to provide an additional semester of teaching relief before tenure. Teaching relief is also provided to new parents through the Active Service Modified Duties (ASMD) https://faculty.gatech.edu/faculty-affairs-reps/internal-resources/active-service.

What am I going to teach?
This is set in consultation with the Chair. Generally, pre-tenure faculty are asked to prepare no more than three different courses. It is advisable to teach at least one class with significant undergraduate enrollment before tenure. If you are thinking about developing a new undergraduate course, Sam, Zak or Andy can help you make sure it fits into the curriculum. If you are thinking about developing a new graduate level course your colleagues can help you assess how it might fit the needs of graduate students in the research area. Generally new courses are taught as “special topics” for a couple of years before going through the formal approval process.

How do I get textbooks?
Samantha orders textbooks and sends out an email the previous semester.

How do I access course management software?
Canvas can be found at gatech.instructure.com (also can access via buzzport)

How do I get office supplies and other supplies for teaching?
There is a supply closet with whiteboard markers and other supplies. Natasha or one of the student assistants can unlock it for you and order additional supplies if necessary.

How do I make copies of exams and other material for use in class?
Use the copy machines in the mail area. Contact Belal Elnaggar if you need help with the copier (paper, jams, etc.).

Can I have a TA or grader for my class?
Generally, TAs are reserved for large enrollment classes. But if you feel that you need a TA due to the unique nature of your course, contact Greg. Student graders can also be hired.

Where can I find a listing of courses offered each semester, input grades, verify participation, etc.?
On buzzport.gatech.edu

Technology

How can I get a laptop or desktop computer?
Contact EAS IT Lead (Nguyen Nguyen: nguyen@gatech.edu). You can also send a request to (support@eas.gatech.edu)

How do I register a laptop or other personal computer?
Send a request to (support@eas.gatech.edu)

How do I access campus Wi-Fi?
Via eduroam (https://lawn.gatech.edu/eduroam). If you encounter any issues, contact (support@eas.gatech.edu)

Where can I print and scan?
There are color and black-and-white printers in the mailroom that you can use. Nguyen or Danny can help you network to these printers by sending an email to support@arcs.gatech.edu. The copy machines can be used to scan and save as pdf. Posters can be printed for relatively low cost in the Library Multimedia
Center (https://library.gatech.edu/multimedia-studio). There is also a plotter in the Geophysics Computer Lab that is primarily used by the Newman and Peng groups.

**What is ARCS?**
Academic and Research Computing Services (http://arcs.gatech.edu) supports computing and networking within the College of Sciences. They can address issues with personal computers, data storage and backups, networking (wireless and wired), printing, two-factor authentication, and software site licenses.

**How do I create a helpdesk ticket for ARCS?**
Send an email to (support@arcs.gatech.edu).

**What is PACE?**
PACE is the partnership for an Advanced Computing Environment, an umbrella term encompassing the institute-level high-performance computing facilities at Georgia Tech. Computing and/or storage resources from PACE can be purchased using startup or other funds, and include (in the purchase price) support from PACE technicians and computer scientists, most of whom are PhDs in computer science, and some of whom hold adjunct appointments in the College of Computing (and so can write collaborative proposals involving novel computing). In EAS, research groups utilizing PACE generally have two types of computing resources: (1) individual queues for submitting computing jobs that are only available to that group and which only include resources purchased by that group, or (2) shared queues between multiple groups in which members of all contributing groups are allowed to submit and which are composed of resources purchased by all contributing groups (the large shared queue in EAS is called ATLAS and is primarily composed of nodes purchased by the Bracco, di Lorenzo, Ito and Robel groups). Beyond the internal PACE job scheduler, shared queues are self-governed by PIs to make sure no single user uses more than their group's fair share.

**How do I access the PACE CPU clusters?**
PACE offers orientation classes every two weeks, and also has a regular schedule of classes. All are currently being offered virtually. The orientation slides with basic information about accessing PACE, can be found here: https://pace.gatech.edu/content/orientation

**How to I make a personal/lab group website?**
For an easy to use solution: http://pwp.gatech.edu. Existing WordPress websites can be uploaded to pwp for hosting on GT servers. You can request a lab URL from GT of the following form: XXX.eas.gatech.edu

**How can I get software with a GT site license?**
https://software.oit.gatech.edu

**How do I get access to library resources and Techworks when I am not on campus?**

**What is the fiscal year, and what does it mean for my accounts?**
The State of Georgia fiscal year runs from July 1 to June 30. All state monies (like start up) are budgeted July 1 and need to be spent by June 30. Because of the June 30th end date, we have spending deadlines that begin as early as April for really large purchases and continue through the end of the FY.

**Travel and Absence from Campus**

**What travel and absences from campus need to be authorized? How is this done?**
When you will be seeking reimbursement from Georgia Tech (your grant or other account), create a spend authorization, prior to travel via Workday Financials (access from techworks.gatech.edu). For travel that will be paid by entities outside Georgia Tech, please just submit an email to Greg and cc both Christopher Thomas and Casey Whitt with the subject line "No Cost Travel" and provide an explanation of the trip and the dates in the body of the email. For travel between 10 business days and 8.5 weeks an "Absence from Campus" form is used. Complete the Absence from Campus form and submit to the Admin. Manager (amorain@gatech.edu) for processing by Faculty Affairs. Working from home is not considered an absence from campus. See Travel Section below for more details.

**How does travel reimbursement work?**
Travel reimbursement is done via Workday Financials (access from techworks.gatech.edu). Expenses need to be submitted within 45 days of completion of the trip. See Travel Section below for more details.

**Can I travel during semesters when I am teaching?**
It is sometimes unavoidable to have some travel or be otherwise unavailable (meetings, workshops, review panels, etc.) for professional reasons during the semester. Arranging for someone else to teach (grad student or guest lecture) or scheduling an exam for the missed day is normally the easiest way to deal with this. Remote teaching is also an option that may be used more frequently now that faculty and students are all experts. If you need to be away from your class for an extended period (for example, for fieldwork), this should be discussed with the Chair.

**Can childcare associated with professional travel be reimbursed?**
The College of Science administers a Child Care Grant that can be used for this purpose ([https://cos.gatech.edu/worklife-balance](https://cos.gatech.edu/worklife-balance))

**Other Questions?**
http://www.admin.eas.gatech.edu/home (can access from EAS home page)
https://cos.gatech.edu/faculty-resources (can access from College of Science homepage)

Institute wide resources related to your work as an employee and researcher can usually be found on techworks.gatech.edu

Institute wide resources related to teaching can usually be found on buzzport.gatech.edu

---

**Financials**

**DocuSign**

DocuSign is the official eSignature platform for the university. We use DocuSign for all signatures.
Sign-in Page: [https://esignature.gatech.edu/](https://esignature.gatech.edu/)
Support Page: [https://support.docusign.com/](https://support.docusign.com/)

DocuSign has a lot of templates but you can also upload documents as well.

**Funding Reports by Type (Sponsored, Designated aka State, Foundation)**

[https://wd5.myworkday.com/gatech/d/home.html](https://wd5.myworkday.com/gatech/d/home.html)

**Sponsored Projects (Grants)**

The Sponsored Award Budget Expense Report (SABER) will show everything associated with a worktag since the inception of Workday, in real time. Everything Pre WD will shows as a journal transfer and can be found with the assistance of the finance team.

The SABER will show you all your reports and everything highlighted in blue is a drill down option where you can find more detailed, transactional information. You have the ability to look up your sponsored worktag information through [SABER](https://wd5.myworkday.com/gatech/d/home.html) using either the award number, grant worktag, or PI name.
Running the SABER

SABER - Sponsored Award Budget Expense Report

Instructions:

- Log in to Workday
- Type SABER in the search bar at the top of the home page
- Choose: SABER: Sponsored Award Budget Expense Report
- Type in the award number (AWD-xxxxxx) to see all worktags related to the prime project
- OR type in the worktag (GRxxxxxxx) to see the specific project
- OR type in your name to the Award PI tab
- Press OK (this gives you the project total. If you want to see activity for a specific time period, then put in dates)
- Note Workday has a big footprint, so there are both vertical and side scroller to be aware of
- Any number in light blue allows you to drill into the transactions that make up that number. Click directly on it
- The report can be downloaded into Excel by using the Export to Excel button in the upper right of the smaller window that appears

Report Terms:

1. Award Info
2. Grant Info
3. Original Budget – This is the amount the budget originally started with since WD. Not the Full award amount
4. Amendments – Additional flows of the budget as agreed upon by the sponsor
   a. 2nd, 3rd, etc., year funding, award decreases, reallocation of funding based on object classes such as salaries, Materials & Supplies, etc.
5. Current Budget – The Original Budget plus/minus any changes will give you total current budget
6. Actuals – The actual amount of the encumbered portion that you have spent to date. An encumbered amount becomes an actual when an encumbered amount is paid.

7. Obligations (direct) - An obligation, or encumbrance, is an amount for which there is a legal obligation to spend in the future.

8. Commitments (direct) - A commitment, or pre-encumbrance, is an amount for which there is no legal obligation to spend in the future. Often related to Spend Authorizations.

9. Estimated F&A for Obligations and Commitments

10. Available Balance

11. Percent Remaining

12. Award Sponsor

13. Award PI

14. Award Lifecycle Status

15. Award End Date

16. Months Left for Award

17. Grant PI

18. Grant Manager

19. Grant Lifecycle

20. Status

21. Grant End Date

22. F&A Rate

For State Funded including Start-up Funds: Use the Expense Budgetary Balance Report (EBBR)

- Log in to Workday
- Type Exp Bud the search bar at the top of the home page
- Choose: Expense Budgetary Balance Report – GTCR
- Organization: CC000093
- Budget Structure – OneBudget Structure
- Worktags: DExxxxxxxx
- Any number in light blue allows you to drill into the transactions that make up that number. Click directly on it
- The report can be downloaded into Excel by using the Export to Excel button in the upper right of the smaller window that appears

Georgia Tech Foundation Funds (GTFs)
Use the Expense Budgetary Balance Report
Same instructions as above, except change the Budget Structure to Gift Budget Structure

** Please note that some GTFs will show a Designated as the number with a GTF in the name, i.e. DE00018231 GTF310000102 CoS COVID Research Recovery Funds
Salary Reports
The Salaries & Wages portion of Workday reports will display the salary/fringe amounts but will not list any information by employee. Detailed salary reports can be provided by the finance team.

Ledgers
The finance team will send out your ledgers once every quarter. This ledger spreadsheet, based on WD transactions and other budgetary information, will have a list of the actual expenditures and encumbrances, across all object classes and a balance as of the spreadsheet update date. If you want a real time balance, please use one of the reporting methods listed above.

Non-Trip Expense Reimbursement

• Reimbursements for goods and supplies should only be made for small dollar items less than $500 where it is not practical or possible to make the purchase using standard Institute procurement processes. Purchases over $500 that have not been approved by the Director of Purchasing may be classified as personal purchases and may not be reimbursed.
• Convenience and/or a lack of proper planning are not legitimate reasons to circumvent standard institute procurement processes. Use of personal funds, up to $500 per day or event, is allowed only when logistical or extenuating circumstances occur that preclude use of the Georgia Tech E-Procurement System procurement process or PCard.
• All reimbursements should be submitted within 45 days of incurring the expense and must be allowable by the funding source being charged. Allowable exceptions to this policy are noted below.
• All reimbursements must have an explanation as to why standard institute procurement processes were not used.
• Please see the finance team if you are unsure about a reimbursement BEFORE making the purchase.

Allowable Exceptions

• Travel expenses for individuals
• Conference and meeting registration fees
• Cell phone/internet expenses (mobile and home use) Note: This does not include mobile device purchases
• Agency fund (as defined in the chart of accounts) purchases
• Study abroad expenses incurred during overseas activity
• Small dollar research participant payments (< $75/person) where check payment is not practical or possible
• Allowable restaurant meal purchase associated with an official GT conference/event/meeting
• Staff Tuition Reimbursement Assistance Program (STRAP) tuition reimbursements
• Campus Recreation Center (CRC)/Outdoor Recreation Georgia Tech (ORGT) reimbursements for trip leaders (Alaska, National Parks, etc.)
• Allowable food/beverage supplies purchased at retail store
• Business center supplies/printing/shipping incurred while on travel status

Procurement

Policy Page

All Suppliers to be paid with a Purchase Order need to submit an External Supplier Request to be listed in WD.

Expenditure Thresholds

1. $2499.99 or less –
   • You can buy from whoever you want, using a PO or P-Card (if allowable)
   • If you are using your P-Card, it is YOUR responsibility to ensure the Purchase is allowable.
2. $2500 - $24999.99 –
   • You MUST have a PO before placing your order when you spend more than $2,500.
   • You need ONE quote from the selected vendor
   • Your quote must be attached to your requisition.
3. $25000.00 or more –
   • You will need to do a formal bid or RFP (both processes are conducted through the Purchasing Department).
- You need THREE written quotes (obtained by the department), with award going to the lowest quote
- A valid Sole Source is also acceptable.

**What is A Purchase Order (PO)?**
A purchase order (also known as a PO) is the official document sent by a buyer to a vendor with the intention to track and control the purchasing process. Once a vendor accepts the PO, it becomes a legally binding contract.

**How do I create a Purchase Order? It starts with a requisition!**
To create a PO, you start by creating a requisition, which is the process of formally encumbering funding and obtaining approval for a service or good.

**Types of Requisitions:**
1. **Procurement Requisition** – This is used for both catalog (i.e. The Punchout) and non-catalog purchases
2. **Bill Only Requisition** – For Invoices with services and goods rendered that did not have a PO beforehand (this is a last resort). Best practice is to obtain a PO before all services or goods are rendered.
   a. **Unauthorized Purchase Form** is needed in the event that you make a purchase before getting the proper approval.
   b. If the Procurement Team does not approve it, the requestor may be legally obligated to paying the vendor.
3. **Change Order Requisition** – Once a PO has been created, to make any changes to it, we have to use this requisition (please contact the finance team for further guidance)

Search Create Requisition in Workday

4. **Select an Option:**
   a. **Request Non-Catalog Items** – For all services/goods that are not apart of the Punch-Out system
   b. **Connect to Supplier Website (The Punch-Out)**. This will take you to various supplier’s marketplaces
5. Select **Add to Cart**. Select **OK** in the confirmation window.
   a. The shopping cart icon will display items in the cart.
   b. Repeat the above step to add another Service line item to the cart. Otherwise, continue to the next step.

6. Repeat the above steps to add additional items to the shopping cart. This will add additional line items to the requisition or select **Continue Shopping** to select a different requisition option.

7. Enter all pertinent information as seen below.
8. Attach all pertinent documents, such as a Quote (see Elements of a Quotation below) and/or email approval chains
9. Submit for approval

*Only Goods should go under the Goods section.
*Only Services should go under Services section.
*Any PO over $3000.00 requires you to create a receipt in WD before payment.
*You MUST have a Purchase Order (PO) before placing your order when you spend more than $2500.00.

Elements of a Quotation
- Supplier's logo/name/contact information/Remit To Address
- Quotation number
- Effective date
- Itemized list of goods or services
- Shipping information
- Trade in information, if applicable
- Grand total
- Other terms and conditions

Blanket Purchase Order
A blanket purchase order is a PO written for a total dollar amount which can be used to facilitate purchases that will require periodic payment over time (leases, frequently used suppliers, etc.). The blanket PO allows the department to submit periodic invoices directly to the Accounts Payable Department without creating a new PO, or new PO line, for each purchase. The invoice amount is deducted from the total value of the approved blanket PO until the amount of the PO is exhausted or all goods/services have been received. Note: The PO should be setup as a service requisition in Georgia Tech’s E-Procurement System (Workday) and received upon as goods or services are received, to ensure invoice payment is compliant with Institute terms and conditions. Blanket POs should be created
at the onset of a contract or annually when possible. Blanket POs with an amount greater than $2,500, should be utilized with the approval of Procurement Services to ensure compliance with all competitive thresholds, and requirements governing Institute and sponsored funds.

**Paying An Invoice**

After you have received a PO number then received the goods and services from the supplier, it’s time to pay the invoice. 

1. The Final Invoice must be named as an invoice/receipt  
   a. Proforma Invoice is NOT a final invoice  
   b. Sales Order/Sales Acknowledgments are NOT invoices

2. The Final Invoice must have the supplier logo/name/contact info/address/invoice number/itemization of goods/services/total dollar amount to be paid

3. The Final Invoice must list the PO number. A simple Adobe edit, adding the PO number will suffice

4. The Final Invoice MUST be emailed to apinvoices@gatech.edu  
   a. Only ONE invoice per attachment  
   b. Multiple attachments per email is ok  
   c. Do not send duplicate invoices

5. Georgia Tech Payment Terms are Net 30 from the day AP receives and matches the invoice.

6. Use the Supplier, Purchase Order & Invoice Inquiry page Lite System in Techworks to verify payment or contact the finance team

**Supplier Invoice Requests**

Payments that do not require a purchase order and submitted via the Institute’s Financial System. Examples include payment to individuals, for Non-Employee services such as workshop instruction and participation where a deliverable of some type is expected. Not for businesses (unless it is another state agency such as another BOR university)

- You must include a detailed memo including the  
  - Name of Supplier  
  - Remit-To-Address of the supplier  
  - Payment Amount (no hourly rates)  
  - Description and dates of service  
  - Worktag to be paid from  
  - GTech contact name/number or email  
- You must include a copy of the invitation email, letter, or flyer sent to participants to solicit participation and provide service details. Both must be in PDF form.

**Honorariums**

- An honorarium must be paid for services provided and cannot be used as a form of payment for an award.
- The service provided is one where Georgia Tech does not expect a particular deliverable. Examples include:
  - presentation of research results  
  - reading of papers  
  - participation or leading of colloquiums, workshops, and seminars  
  - presentation of lectures  
  - The services provided must be short-term in length. Short-term is defined as 9 business days or less. Services over a longer period of time must be contracted.
- Amount Limitations  
  - Each honorarium activity should typically not be greater than $5,000 unless a special exception has been granted by the Purchasing Department. Honorarium payments are processed as a direct expense and are not initiated through the requisition process.  
  - Amount of honorarium may include payment for services along with amount intended to cover travel expenses.  
  - Amount for services (honorarium) may be paid and expenses reimbursed with appropriate receipts and documentation. Payment of honorarium and expenses must be requested at same time.
Gift Cards

Gift card usage, as a form of payment to employees and students is **prohibited** for the following purposes:

- Incentives
- Awards
- Door prizes
- Gifts for personal accomplishments, including retirements
- Holiday or graduation gifts
- Compensation

Gift card usage is **allowable ONLY** for the following purposes:

- Research participants that participate in sponsored research activities
- Students that participate in student surveys or activities
Procurement Troubleshooting Guide - This guide details frequently used tasks, resolutions to common issues, and tips and tricks relating to Procurement.

Procurement Card (Pcard)

Policy Page
Quick Reference Guide: Allowable vs Unallowable
Pcard Forms

For all Pcard purchases, please adhere to the policies as listed on the policy page. If you have any questions, it's best to reach out the finance team before making a purchase.

- All Pcard purchases are tax exempt. The Tax Exempt Form can be found here.
- Know your card limit. A limit increase can be requested on an as need basis. The approval process takes some time.
- PCard purchases can only be shipped to GT addresses. Items shipped to non-GT locations must have written approval from the cardholder's supervisor and the PCard Administrator. The approval email will need to be attached to the verification.
- Gift cards can NEVER be purchased on a Pcard.

Documentation Needed: All Docs need to be in PDF form
1. Pcard Req form, except where there is valid exception that meets the criteria below.
2. Itemized Invoices that lists the items purchased and display the method of payment.
3. Signed Food group form for all food related purchases that are intended to be ingested
   a. Signature
   b. List of attendees for 15 persons or less

Procurement Card Requisition Form Signature Process

Purchase Requisition Forms are required for all Pcard Purchases. The form must be signed before the purchase unless the purchase meets the exception criteria:
- **Unplanned**: not anticipated or known in advanced, thought lack of planning does not constitute urgency.
- **Non-routine**: commonplace tasks, chores or duties done irregularly or at a sporadic interval. Not monthly or standard recurring.
- **Urgent**: compelling or requiring immediate action or attention; imperative; pressing.

Only cardholders with a "Research" designation can use this exception. This exception is for research related purchases under $5000 that are non-routine items needed to run the department. This is meant to cover any research materials that are urgently needed to continue the project and prevent any delays.

Remember the Requisition Form is an estimate of prices. You are not expected to know the specific amounts ahead of time, so submit the forms as soon as you think you'll make a near-future purchase, to be safe.

Approver 1 Signature: Casey Whitt, Financial Admin III
Approver 2 Signature: Christopher Thomas, Financial Manager

Verification Process Guide in Workday:

TRAVEL

ALL TRAVEL MUST BE PRE-APPROVED via Workday.

See sections below for more guidance on types of travel related expenses.

1. Spend authorization through Workday is required for all out of state travel (domestic and international) PRIOR to travel. ***These only need to be estimates not final prices***
2. The State of Georgia is no longer under a non-essential travel ban. Regular domestic travel may resume under normal travel policies.
   a. Essential international travel is permitted with managerial approval. Essential travel is defined as:
      1. Important to the mission of the Georgia Tech;
2. Involves activities that cannot be conducted virtually;
3. Is time sensitive due to work deadlines or other related considerations. In all cases, travelers and their managers should review and adhere to current CDC guidelines on international travel.

3. Create Expense Report from the Spend Authorization and

4. After You’ve returned from the trip, in Workday, Create an Expense Report.
   a. Search Expense Report
   b. Select “Create New Expense Report from Spend Authorization”.

The expense report is for my reimbursement to the AAAS conference held in Portland, Oregon.
c. Next, the memo field is your friend, please use it to describe your line item. Enter any further clarifying information relevant to the expense report here. See below:

<table>
<thead>
<tr>
<th>Expense Item</th>
<th>Ground - Taxi - Domestic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
<td>1</td>
</tr>
<tr>
<td>Per Unit Amount</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Amount</td>
<td>0.00</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
</tr>
<tr>
<td>Memo</td>
<td>ground transportation to the airport</td>
</tr>
</tbody>
</table>

d. Item Details provides more information about your travel. It's a very handy tool. Please become familiar with it. State when you arrived at your destination, when you departed, and where you went (Atlanta, Florida…)

Item Details

<table>
<thead>
<tr>
<th>Hotel</th>
<th>Ritz-Carlton</th>
</tr>
</thead>
<tbody>
<tr>
<td>Departure Date</td>
<td>12/15/2019</td>
</tr>
<tr>
<td>Arrival Date</td>
<td>MM/ DD/YYYY</td>
</tr>
<tr>
<td>Destination</td>
<td>ATLANTA, Georgia, United States of America</td>
</tr>
</tbody>
</table>

Arrival Date- First day of travel; departure date- last day of travel period. Click “Itemization” and there is another memo field. It takes the guess work out of the process.

Reimbursement for Travel Expenses

All receipts/invoices must show the method of payment. If it doesn’t, please add supporting documentation such as a redacted bank/credit card statement, highlighting the payment in question. Expense Reports that do not include the required receipts and/or documentation will be returned to the traveler.

*Itemized receipts are required for the following:
  - Air, lodging, and rental cars
  - Visa/Passport fees
  - Conference registration fees
  - All single expenditures of $25 or greater

*Itemized receipts are not required for the following expenses, if individual amounts are less than $25.
  - Please include the details of the expense on the Expense Line in Workday:
    - Gasoline purchased for rental vehicles
    - Parking
    - Highway tolls
    - Mass Transit tickets
    - Taxi fares
    - Airport vans

Travel Inc and Concur (the online booking platform) Info and Tips

- Preauthorized employees can elect to charge flights directly to Georgia Tech by completing the Direct Bill Airfare Workday Form which has to be signed by the Financial Manager. This is a one-time step and does not need to be repeated for future travel.
- To use Concur, you must complete the Concur Workday Form. You'll need you work ID, the Cost Center for EAS (CC000093) and a Default Worktag (see finance team)
  - Submit the form through Service Now (Techworks page) for approval.
- Each booking incurs a Travel Agency Fee; call, $21.50/25.50 (dom/int), online booking $5.00
- Travel Inc allows for Frequent Flyer Programs for various airlines.
Travel Inc. provides no-fee cancellations under the State travel contract. Concur stores flight credits for future access and booking. Can be used for another GT employee in the unit.

Flights may be cancelled using online booking tool or by calling Travel Inc. GT-paid fares issued as travel credits to Department; personal credit card fares issued as credit in name of individual; can be used for personal travel.

Car and Hotel reservations may be added to your Concur itinerary. Hotels not on direct billing will be paid via personal card payment and reimbursed via WD Expense Report.

Make separate companion reservation through public websites or agencies. Travel Inc. in-person call may be able to assist with this.

Claim reimbursement for GT Business portion of plane fare using the standard Expense Report process. **DO NOT choose the “Direct Bill to GT”** option for itineraries that include a personal leg.

Take care when making reservation to get fare quoted without personal leg first, so that you can document the reimbursement amount on your expense reimbursement request.

**Transportation (Air)** 770-291-5190

The use of Travel Incorporated is **required** for flights. This provides necessary visibility of travelers and provides traveler support and cost management. Direct billing of Airfare through Travel Incorporated should be used for all airfare bookings to reduce potential complications with changes, cancelations, and reimbursements.

**Ground Transportation (Mileage, Parking, taxi, and Rail)**

*Mileage for on-campus travel is not reimbursable.*

*Use of personal vehicle for Out-Of-State travel will be reimbursed on the lower of:

1. the lowest available coach airfare,
2. the actual mileage rate

*Reimbursement for the use of a personal vehicle to travel to/from the home airport may be made for mileage reimbursement for one round-trip to and from an airport. Mileage is calculated from home or headquarters (whichever is closer) on regular workdays. If the Traveler is dropped off at the airport, only a one-way mileage reimbursement (from home or headquarters) may be claimed on day of departure and day of return. On weekends and holidays mileage may be reimbursed from the actual point of departure. See Personal Vehicle Mileage Reporting below for additional information.*

*Although receipts are recommended, Travelers are not required to submit receipts for travel by mass transportation, taxi, or airport vans. An explanation must be given from the departure location to the destination location for each such item requested for reimbursement.*

*All transportation expenses should be itemized in the expense report in Georgia Tech's financial system.*

**Rental Vehicles**

- GA Statewide Rental Car Contracts COME WITH LIABILITY and PHYSICAL DAMAGE COVERAGE (CDW, LDW)! Concur and Travel Inc. have the contract #s on file and application is automatic.
- Supplemental liability insurance is not reimbursable (SLI, LIS)
- When traveling internationally, all rental car insurance offered should be purchased. These expenses are fully reimbursable via the Institute's Financial System.
- If a rental car from a Georgia Tech or Statewide contractual agency is not available for domestic rental, then CDW and LCW insurance must be purchased.
- Additional Reimbursements for gas, tolls, and parking, navigation systems for remote locations (receipts required for all)

**Lodging**

- Claims for reimbursement must be documented by a "paid" copy of the bill. Credit card receipts or canceled checks are not acceptable receipts. A travel advance can be obtained through Georgia Tech Research Corporation for all lodging pre-paid by an employee.
- Please separate out all non-room expenses to their own expense lines in WD.
- Airbnb, VRBO, and other private resident rentals are prohibited. Travelers on international travel status are exempt from this requirement, provided there is not actual or perceived conflict of interest.
- Overnight lodging rates that exceed $500 per night require approval from the Director of Accounts Payable and Travel or the Senior Director of Business Services prior to the submission of the
spend authorization. A detailed email with justification of the expense must be sent prior to making the reservation.

**Conferences Registration**

**Registration Payment**

Payment for registration fees will be made in one of three ways:

1. Procurement Card (PCard) - the preferred method of payment and a best practice;
2. Reimbursement to the traveler via the submission of an Expense Report in the Institute's Financial System; Workday.
3. Submission of a Supplier Invoice Request (SIR) via the Institute's Financial System; Workday.

**Supporting Documentation (In PDF)**

1. Detailed paid receipt, copy of the check, or a redacted bank statement showing the date of purchase and the amount paid
2. A conference, agenda/brochure indicating the conference name, dates, and location must accompany the request. For Meetings Only, the agenda will do.

*A PDF Print out from website will suffice*

**Conference Meals**

Any part of a registration fee applicable to meals will be reported as a meal expense, if the cost can be identified. Otherwise, if meals are included as part of the registration fee, those meals should not be claimed as per diem meal allowances.

**Meals AKA Per Diem**

- **Per Diem Rates** are based off the location being of lodging
- Travelers are eligible for 75% of the total per diem rate on the first and last day of travel, and deductions must be made for any meals that have been provided as outlined in the Required Meal Claim Deductions section.

**Miscellaneous Travel Expenses**

Miscellaneous Travel Expenses are allowable when on official travel status and appropriate. Please go to the policy page link above for a non-comprehensive list of allowable and unallowable expenses.

**Trips Which Include Annual Leave/Personal Travel**

- As a general rule, employees taking annual leave while away from headquarters home on official business are to keep travel expenses pertaining to official business separate. Only expenses incurred during and pertaining to the official travel will be reimbursed, or which would reasonably be expected to be incurred if only the official travel had occurred. The beginning and end trip dates should be included on the Travel Authorization. Personal travel dates should be noted and added in the “detailed trip description” field.
- Reimbursement for airfare is limited to the least expensive round-trip airfare to the official destination point(s). Quotes for round-trip airfare for the dates with and without annual leave should be obtained from the Institutes contracted travel management company (Travel Inc.), as a cost comparison, to reflect the most economic airfare at least two weeks in advance.

**Miscellaneous**

Turn-Around Times:
Document Signatures via DocuSign– by EOD of within 24 hours
Workday Approvals – 24-48 hours
Ledgers – Once every quarter
Email Responses – 24-48 hours

The Finance Team uses Microsoft Teams for quick communication.

**Graduate Students of EAS Events Information**

Should students need to make purchase for Graduate Student Programming using personal funds, please see the information below on what is reimbursable. Please see Expense Report section above for submission steps. If in doubt, ask Aria beforehand.

- The maximum reimbursement per person will be $500.00.
• Please make sure that no one person spends above this amount and please make sure to have a uniform naming in the memo-section of the expense report so that we can track spending for this event, i.e. Grad Student Retreat 9/21/21-9/22/2021
• All itemized food receipts must have an accompanying Food Group Meal Form signed by Aria Higgins, via Docusign
• No Alcohol shall be purchased for reimbursement. No Exception!
• A copy of the meeting agenda/email/flyer must accompany all reimbursements/expenditures
• Gas is included in the mileage reimbursement, unless in special circumstances occur (see Aria for details)
• Parking is reimbursable
• See sections above on how to complete an Expense Report