



Georgia Institute of Technology  
School of Biology

Administrative & Financial  
Quick Reference Guide

School of Biology  
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<http://www.biology.gatech.edu>

## Important Websites and Information

The following websites provide useful information regarding the Institute's policies on:

Administration and Finance website: <http://www.admin-fin.gatech.edu>

**Risk Management and Waivers:** (Found under Policy Manuals – Business and Finance Manual – Chapter 8, Topic 8.1)

**Gifts:** (Found under Policy Manuals -- Business and Finance Manual – Chapter 1 – Topic 1.4.2)

Emergency Notification: <http://www.gatech.edu/emergency/notification.html>

Environmental Health & Safety: <http://ehs.gatech.edu>  
404-894-0499

Legal Affairs website: <http://www.legalaffairs.gatech.edu>

**Georgia Open Records Act:** (Found under Topics)

**Contracting Issues:** (Found under Topics. Additional information found under Signature Authorization)

Media Contact – Prior to any contact with the media, you must obtain approval from Dr. John McDonald and make contact with David Terraso with **Institute Communications & Public Affairs (ICPA)** at 5-2966 <http://www-stage.gatech.edu/icpa/>

OHR website: <http://www.ohr.gatech.edu>

**Nepotism:** HR Policies and Procedures – Chapter 8, Topic 8.37)

**Anti-Harrassment Policy:** HR Policies and Procedures – Chapter 1, Topic 1.7. This includes Discriminatory and Sexual Harrassment)

**Alcohol and Drug Testing:** (Found under Employment – Additional Resources)

**Workers' Compensation:** – HR Policies and Procedures – Chapter 6, Topic 6.11)

OSP website: <http://www.osp.gatech.edu>

**Conflict of Interest:** (Found under Research Compliance)

The School of Biology's **Emergency Plan** can be found in a red notebook located in the Bio-Hub (CE 208) and in the Administrative Manager's Office (CE 201).

## **Purchasing**

**How to Obtain a Pcard:** Contact the staff in the Finance Office.

### **Unacceptable purchases on Pcards:**

1. Inventoried equipment with cost in excess of \$2,999.99
2. Individual transactions \$5,000 and up
3. \*Travel: Gasoline, Hotel, Car reservation, etc.
4. Cash Advances
5. Entertainment
6. Items for personal use
7. Items available through GTRI warehouse
8. Split orders to remain within their transaction limit
9. Alcoholic Beverages

\* Registration fees are acceptable Pcard purchases.

### **Pcard Statements:**

It is the cardholder's responsibility to reconcile, sign, and submit Pcard statements to the Finance Office. The following must be attached to the statement:

1. Original receipts
2. Missing receipts (submit either a or b):
  - a. Catalog or Web page with amount
  - b. List of Items with description and amount

You may keep the GT Log for your P-card (optional).

### **Purchases (Other than P-card):**

Purchases that total \$5,000 or equipment over \$2,999.99 must go through the Financial Office. Complete a Sole Source for orders that are \$5,000 or greater and e-mail the form and Quote to the Finance Office.

### **Proposals:**

1. The Financial Manager reviews the budget and completes the routing form.
2. The Financial Manager obtains the Chair's signature and submits the forms to the appropriate OSP Contracting Officer.

## **Administrative & Financial Procedures Administrative Information and Procedures**

### **Bio Hub (CE-208)**

#### **1. FedEx**

FedEx supplies, pick-up, and drop-off are located in the Bio-Hub. All FedEx shipments should be scheduled online using your project number. Pick-up's must be scheduled by 3:00 pm in order for FedEx to pick up the same day. DHL and UPS will also pick up from the Bio-Hub, The sender is responsible for scheduling pick-ups online.

**Please note: you must always use your project number for FedEx shipments.** SoB pays for such items as grant proposals.

#### **2. Supplies**

The Bio-Hub will be your central location for supplies. If you request something other than what is regularly stocked, please notify Kathryn Macken (4-8435). If you want to order supplies with your PCARD, it MUST default to a start-up account and you are responsible for placing that order through Staples.

#### **3. Copying**

**A Copy and Work Order Request Form**, which can be obtained in the Bio-Hub, is required when you request print or copy jobs to ensure the job is done on time and accurately. You may email your requests to Lisa Tuttle ([lisa.tuttle@biology](mailto:lisa.tuttle@biology)) as long as you include all of the information found on this form. You may also copy your own jobs. You will need a **copy code** which you can get from Lisa Tuttle.

**Copiers:** You may print to either the bio-ralph\\bio-ce-hub-bw (black & white) or bio-ralph\\bio-ce-hub-color

#### **4. Color printers**

The bio-ralph\\bio-ce-hub-color may be used for everyday color print jobs. The Lexmark printer is a color printer which is only used to print **high resolution** color documents. In order to print to the Lexmark, you must email your document to Lisa Tuttle ([lisa.tuttle@biology](mailto:lisa.tuttle@biology)) along with the # of copies. The copies will be placed in your mailbox once they have been printed.

#### **5. Equipment check out**

A valid GT ID is required for students to check out equipment and the request must be tied to a faculty member. If the return is after 5pm, the student and/or faculty member is required to return it by 8am the next day without exception. If equipment is defective, please notify Lisa Tuttle (4-3700) or Kathryn Macken(4-8435) so it can be repaired.

## Computer Support

Accounts are administered by School of Biology's technical support. Accounts can not be assigned until a faculty member has his/her buzz card or a GT ID number.

Passwords can be changed at <http://passport.gatech.edu>.

Email addresses will adhere to the following format  
firstname(dot)lastname@biology.gatech.edu

The School of Biology's website is maintained by School of Biology's technical support. All web site changes should be emailed to [helpdesk@biology.gatech.edu](mailto:helpdesk@biology.gatech.edu) with detailed instructions on what should be changed.

Computer and Software purchase request must go through the School of Biology's technical support. Submit request to [helpdesk@biology.gatech.edu](mailto:helpdesk@biology.gatech.edu).

## Teaching Computer Labs

Software installation request should be made two months before the beginning of each semester; this time frame allows for proper testing of the software. Software installation is prohibited by anyone other than the School of Biology's technical support. Advise students not to save any data on the teaching lab computers. The School of Biology is not responsible for any data lost on these or other departmental computers.

Classroom support is handled by OIT. They can be reached at 404-894-4669.

If you have technical (computer/printer) problems, please send request to [helpdesk@biology.gatech.edu](mailto:helpdesk@biology.gatech.edu).

Students' personal computers and/or equipment are not supported by Biology's Technical support.

## Reimbursements

In order to be reimbursed for any purchase you have made, you must tape (not staple) the receipts to the Check Request Receipt form found on the COS website, indicate the purpose of the purchase, and submit the receipts to the Finance Office.

To be reimbursed for lunches/dinners which are considered "Business Entertainment", you must include:

1. An "Itemized" receipt which shows the food/beverages purchased, taped to the Check Request Receipt form found on the COS website.
2. A list of attendees.
3. A written explanation of the purpose of the gathering.

## Travel

1. Travel Authority Requests (TARs) must be completed through the COS Finance website, printed, signed and turned into the Finance Office BEFORE the trip. If the TAR is not turned in before the trip, a form of justification will be required when you submit your Travel Expense Statement (TES). The TES and justification will then need to be approved by the Chair before being sent to the Dean's Office for final approval.
2. TES are also completed through the COS Finance website, printed, signed, and the original receipts taped on an 8 ½ X 11 paper. For foreign trips, you must include a printout of the exchange rate. A recommended exchange site is: <http://www.oanda.com/converter/classic>
3. A Travel Audit Checklist is available in the Forms/Procedures section of the COS Finance Section.

## Note on GT Policy:

Reimbursement requests are to be submitted to Accounts Payable within 30 calendar days of the last day of travel. TES's submitted to Accounts Payable more than 60 calendar days after the last day of travel will require additional documentation. A memo or form: **TES- Reasonable Exception Request** must be completed and signed by the traveler and the school/department head explaining the delay in sub-mission and or processing and be submitted to Accounts Payable for review. The signature of the school/department head may not be delegated in this case. For the purpose of calculation of late submission by more than 60 days, periods that include official Institution holidays will exclude those days.

## Financial Information and Procedures

**COS Website:** <https://cosfinance.gatech.edu>

Login using your email id and password.

New Users will see a page that allows you to “sign up for new access”. Faculty select “Faculty/Advisor Account” while Post-Docs and Graduate Students should select “User Account”.

### Database Features:

**Project List:** Retrieves a list of your projects with their balance.

**User List:** Displays a list of users who have signed into the system with you as their advisor. These are usually Post-Docs and Graduate Students.

### Reconcile

**Statement:** Where you obtain the GT Log for your p-card. (optional)

### M & S:

**Add Vendors:** A drop down list of vendors currently in the system. Type the name of a vendor that does not appear in the system in the blank space.

**Enter Orders:** Obtain a PO# for vendors who don't take p-card (under the \$5000 rule).

**Query Database:** Interdepartmental Sales: Used to get a PO# and form for Various GT, i.e. Library, Chem Stockroom (VWR order must be charged to a p-card), Genomics Center, etc.

### Forms & Procedures:

Provides links to various departments such as Human Resource, Office of Sponsored Programs, with their forms and procedures.

### Edit Profile:

Make any changes to your profile such as address, your login or password. (Please use your Employee ID not your GTid).

### Report a Problem:

Report any issue you are having with the system here. An email is then sent to David Moore and Ira Bragg, one of which will respond and work with you to resolve the issue.

## Conference Room Scheduling

Please contact Lisa Tuttle (CE-201/ 4-3700) to reserve conference rooms. Reservations on a first come first serve basis.

## ES&T Mail Room

Deliveries will be made twice daily (morning and afternoon). During this time any mail, packages small enough to fit in your mailbox, and any needed supplies will be delivered. Any outgoing mail and requests for new supplies will be picked up.

## Grade Change Forms

The grade forms may be obtained in Room CE-211 by faculty or instructors only.

## HI-B and J-1 Procedures

Please note that neither an H1B nor J1 can be processed until the applicant's hiring package is approved through Faculty Services. To begin processing an H1B or J1 visa, please contact Barbara Walker (4-3747). Both visas take a considerable amount of time to process so advance planning is critical.

## Inventory

**If you move** a Mac, PC or any equipment from an office to a lab (or vice versa) –please email [facilities\\_help@biology.gatech.edu](mailto:facilities_help@biology.gatech.edu) of the new location. An email with the serial number, model number and new location will suffice. We are subject to “on the spot” inspections and inventory must be in the location it is assigned. For more information contact: [facilities\\_help@biology.gatech.edu](mailto:facilities_help@biology.gatech.edu)

**ALL technical equipment** (computers, scanner, printer, etc.) If you plan to take it off campus, you are required to complete a loan agreement and it needs to be added to Biology's inventory (internal inventory, and external Georgia Tech inventory)—this also serves as a backup for police reports of stolen equipment. Please contact [helpdesk@biology.gatech.edu](mailto:helpdesk@biology.gatech.edu).

## Key Distribution and Building Access

Faculty must send an email to [facilities\\_help@biology.gatech.edu](mailto:facilities_help@biology.gatech.edu) and copy [bio.financial@lists.gatech.edu](mailto:bio.financial@lists.gatech.edu) specifying the offices, labs and/or building(s) for which they are requesting a key/access. A \$25 deposit must be paid in Room C110 of the Cherry Emerson Building before the key may be distributed. Keys are issued on Mon., Weds, and Friday from 8-10 AM. Keys must be returned as part of the termination process.

## OHR Procedures

### 1. **Hiring process**

Regardless of the title or position, the first step in the hiring process is to contact Barbara Walker (4-3747). The position may need to be advertised through OHR. This process can be lengthy therefore, advanced planning is needed.

### 2. **Tech Temps**

You will need to provide Barbara Walker (4-3747) with a list of job duties, salary, anticipated start date, and account number to which the salary will be charged. Tech Temps are not benefits eligible and must take a 30 day break after one year of employment. Send employee to Barbara Walker for termination.

### 3. **Background checks**

Background checks are now required for everyone regardless of position or title. It takes 24-48 hours to process and the applicant cannot begin employment until the background check is approved.

### 4. **Student Hires**

Students should report to the Finance Office for processing.

### 5. **Terminations**

In order to prepare the final pay check, a letter of resignation must be submitted to Barbara Walker (4-3747) with as much notice as possible to prepare the termination clearance. The clearance involves collection of all GT equipment (keys, pcards, etc.) and an audit of accrued vacation time. Failure to return any and all GT property will result in a hold placed on transcripts and/or final paycheck.

## Events and Symposiums

Any events or symposiums must be presented to the Chair along with a proposed budget indicating how the event will be funded before any preparations for the event can begin. Once the event has received approval from the Chair, the Administrative Manager should be contacted to begin preparations. Symposium guides may be obtained from Lisa Tuttle (CE 201 / 4-3700).

## Biology Seminars

- Contact Dr. Weitz (5-6169) with proposed dates for the seminar.
- Dr. Weitz will block an available date and advise Lisa Tuttle (4-3700) upon approval.
- Lisa Tuttle will contact you with the approved date and gather details to post on the Biology web site.

## TechWorks

TechWorks allows you to handle a variety of transactions online such as viewing and printing your pay stub & W-2, updating your personal data and direct deposit accounts, and enrolling in annual benefits.

For additional information visit: <https://techworks.gatech.edu>.

## Vacation/Sick Leave

The **Vacation-Sick Leave Request** Form is used when vacation or sick leave is requested or taken. If it is planned, the form must be signed by your supervisor and placed in Barbara Walker's mailbox **BEFORE** you take the leave.

- Anyone other than faculty, please report your **immediate** sick leave to your direct supervisor or to Barbara Walker if your supervisor is unavailable.
- If you are sick beyond 5 consecutive days, a doctor's note is required along with the leave form.
- If you are summoned to jury duty, GT requires that you submit a copy of your "jury summons" with your leave sheet.
- The "Vacation and Sick Leave Report - Permanent Exempt Employees" is a form **required by our auditors** and must be signed by you and your supervisor every month.
- Faculty who will be absent for more than 10 consecutive business days must submit an **Absence from Campus Form** to Barbara Walker.

## Family Leave

[https://intranet.library.gatech.edu/policies/policies\\_detail\\_pf.php?ID=142](https://intranet.library.gatech.edu/policies/policies_detail_pf.php?ID=142)

## Sick Leave for Faculty

When a faculty member is out due to illness, they are required to report their absence to Barbara Walker immediately. The faculty member is also responsible for making sure classes are covered and that the students are notified of the change.