

Research Administrator's Forum
- School of Medicine -

Presented by Sponsored Projects
Accounting
October 2, 2003

HRMS Update

- **Recent meetings with research intensive department at both HT and Med School.**
- **Significant *discussion* about encumbrances, data entry, biweekly payroll and overall workload.**
- **HRMS team revising fall workplan based on feedback from meetings.**

HRMS, cont.

- **Install new server.**
- **Create a reporting database.**
- **Create user committee.**
- **Create additional training materials / instructions.**
- **Schedule upcoming PUG meeting.**

Encumbrances

- **Entire encumbrance process was evaluated and re-tested during August.**
- **On-line page for reviewing encumbrance details by account or individual.**
- **Retain history of encumbrance details, which will help identify issues.**

Encumbrances, cont.

- **Multiple programming changes have been implemented during September**
 - **Erroneous calculation of encumbrance for some individuals with academic pay.**
 - **Incorrect encumbrance for bwk employees when a future profile is processed for a new account.**
 - **Modification of timing for encumbering / de-encumbering.**

New Policies

- **Entertainment Events - buob #3550**
- **Business Events - buob #3553**
- **Sponsored Projects Events - buob #3566**
- **Memorial Contributions - buob #3443**
- **Gifts, Prizes & Awards**
 - **Non employees, buob #3554**
 - **Employees, buob #3569**

Entertainment Expenses

- **Meals, activities, or events whose purpose is to promote and further the mission of the University.**
- **Generally result from dealings with people outside the University.**
- **A valid business reason is required.**

Entertainment Expenses, cont.

- **Cost of events should take into consideration the expected benefit to be derived from the event.**
- **Alcoholic beverages should be discouraged and kept to a minimum.**
- **Cost should not exceed \$XX per person.**
- **Gratuities should not exceed 22%.**

Business Events

- **Expenses incurred as a result of normal business operations.**
- **Usually involves only people from inside the University.**
- **Valid business reason required.**
 - **Improving employee moral**
 - **retirement and farewell reception**
 - **staff appreciation**
 - **light refreshments during meetings**

Business Events, cont.

- **Business Events are generally less extravagant than Entertainment Events.**
- **Alcoholic beverages should be discouraged at all Business Events.**
- **Restrictions and limits will be determined.**

Sponsored Projects Events

- **Events and meal expenses incurred in order to meet the goals and objectives of a sponsored project.**
- **Expenses must be charged in accordance with agency guidelines and as provided for in the award.**
- **A valid project reason is required.**
 - **Human subjects meals**
 - **Project related conferences and symposiums**

Sponsored Projects Events, cont.

- **Alcoholic beverages are unallowable.**
- **Cost of meals should not normally exceed \$50 (before gratuities) per person.**
- **Requests for an exception to the sponsoring agency's policy must be submitted to and coordinated by Sponsored Projects Accounting (SPA).**

Memorial Contributions

- **Items given to express empathy or sympathy, typically given for a serious illness or death.**
- **Includes flowers and monetary donations.**
- **Payment should be issued directly to the vendor, when possible.**

Gifts, Prizes & Awards

- **Items given to express appreciation for others contribution to the effort of the University or department and may be taxable to the recipient.**
- **Gifts -**
 - **Includes gift certificates, flowers, plaques, hams, etc.**
 - **Cash or cash equivalents are always taxable to the recipient.**

Gifts, Prizes & Awards, cont.

- **Prizes & Awards -**
 - **Items given as result of some condition being met, including incentive-based programs or winning a contest.**
 - **Are always taxable to the recipient.**
 - **Restrictions and limits will be determined**

Research Administrator's Forum
- School of Medicine -

Presented by Sponsored Projects
Accounting
October 2, 2003