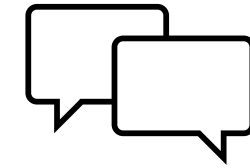


Business Office/Programs Training

April 10, 2023

Get Help

We're here to help!



Message us on Teams



Email us



Create a Help Ticket

We're here to help!

TICKETING SYSTEM



- Create a Help Ticket Online
 - <https://sog-helpdesk.sog.unc.edu>
- Create a Help Ticket via Email
 - sog_bod_tickets@sog.unc.edu
- [Ticketing System FAQ](#)

A screenshot of a web browser displaying the Sog Helpdesk website. The browser's address bar shows the URL 'https://sog-helpdesk.sog.unc.edu'. The website has a dark navigation bar with a 'Home' link. A sidebar on the left contains links for Home, Downloads, My Computer, License Keys, Service Desk, Knowledge Base, and Download History. The main content area features a 'Quick Actions' section with a blue button that says 'Have a problem? Report it'. Below this is a 'Tickets' section with a table of open tickets. The table has three columns: 'Number', 'Please give us a short description of your problem', and 'Status'. Three tickets are listed, all with a status of 'Closed'. On the right side of the page, there are sections for 'Announcements' (stating 'No announcements available.') and 'Helpful Links' (stating 'No links have been created.').

Number	Please give us a short description of your problem	Status
TICK:12717	add Cisco AnyConnect software to my computer	Closed
TICK:12625	shared calendar problem	Closed
TICK:12547	BitLocker recovery	Closed

Three Businesses, One School

THREE BUSINESSES, ONE SCHOOL

UNC School of Government

- Established in 1931 as the Institute of Government, the School provides educational, advisory, and research services for state and local governments. The School carries out its mission through three separate but related avenues: teaching, research and writing, and advising. Each of these avenues is supported through a unique mix of funding.

University

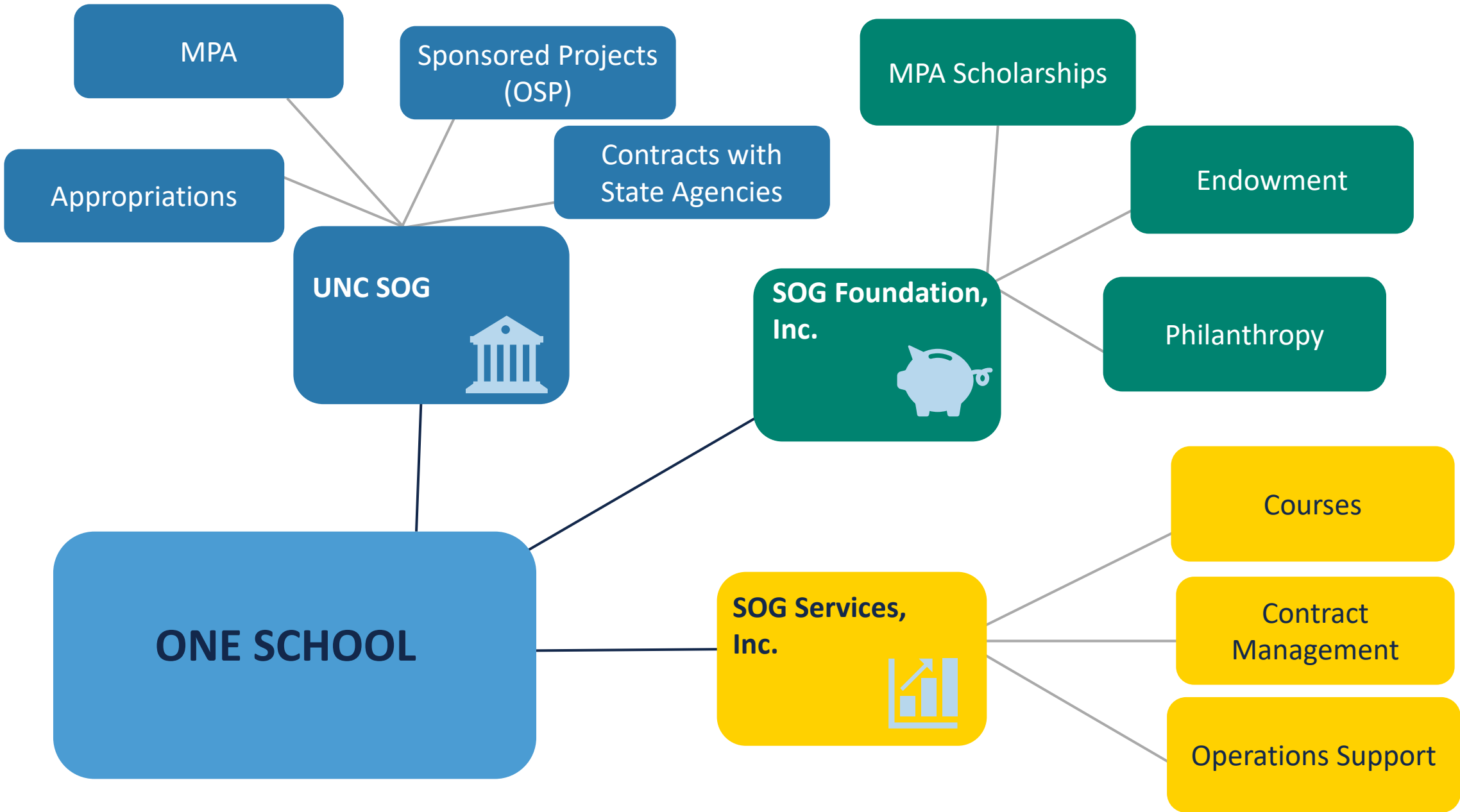
School of Government Foundation, Inc.

- Established in 1996 to help strengthen financial support for faculty teaching and research, statewide education programs, student scholarships, staff development, and general operating needs. Funding for The School of Government Foundation is provided through gifts from private donors in support of the School, as well as membership dues paid by local governments in North Carolina.

School of Government Services, Inc.

- Established in 2021, SOGS assists faculty and staff at the UNC School of Government in carrying out its important mission: to improve the lives of North Carolinians by engaging in practical scholarship that helps public officials and citizens understand and improve state and local government. It is a non-profit corporation and an official associated entity of the School of Government at The University of North Carolina at Chapel Hill. Funding for School of Government Services, Inc. is provided through course registration fees and contracts for services.

Associated Entities



Check the [Programs Event Dashboard](#) to find which business applies

New Resource

PURCHASING REQUIREMENTS BY BUSINESS

Purchasing Requirements for SOG Businesses

	UNC SOG	SOG Services	SOG Foundation
CREDIT CARDS			
Credit Card	P-card (Provide receipt, chartfield string in BOA Works) T&E Card for business meals and professional dues (Provide receipt, chartfield string in Concur)	Ramp Card (Provide Receipt and Cost Code in Ramp)	Pcard (Provide receipt, chartfield string in BOA Works) or SOG Foundation Civic Card (Provide receipt and business purpose to Foundation Accountant)
INDEPENDENT CONTRACTORS			
One-week speaker less than \$5,000	•Speaker Checklist •W-9	•SOG Services Speaker Checklist •W-9	•Speaker Checklist •W-9
Community collaborator less than \$5,000	•Collaborator Checklist •W-9	•SOG Services Collaborator Checklist •W-9	•Collaborator Checklist •W-9
IC less than \$10,000	•Employee/Independent Contractor Determination Checklist •W-9 •Background check if working with students	•SOG Services Contracted Service Authorization and Approval Form •W-9 •Scope of Work	•Employee/Independent Contractor Determination Checklist •W-9 •Background check if working with students •Scope of Work
IC greater than \$10,000	•Employee/Independent Contractor Determination Checklist •W-9 •Customer Request for a Brand/Vendor Specific Waiver of Competition •Independent Contractor Service Agreement •Statement of Work •Background check if working with students	•SOG Services Contracted Service Authorization and Approval Form •W-9 •Independent Contractor Services Agreement •Scope of Work	•Employee/Independent Contractor Determination Checklist •W-9 •Customer Request for a Brand/Vendor Specific Waiver of Competition •Independent Contractor Service Agreement •Statement of Work •Background check if working with students
GOODS AND SERVICES			
Goods or Services Less than \$5,000	•Invoice •Vendor setup forms: W-9, HUB Form, & ACH	•Invoice •W-9	•Invoice •W-9 •Approval from Foundation Treasurer >\$2,500
Goods or Services between \$5,000 and \$25,000	•Quote (Recommended: obtain pricing from multiple sources) •Requisition and Purchase Order (PO) •Vendor setup forms: W-9, HUB Form, & ACH	•Invoice •W-9 •Quote or agreement signed by SOG Services Director	•Invoice •W-9 •Quote or agreement signed by Foundation Director/Dean
Goods or Services between \$25,000 and \$100,000	•3 quotes through official University RFQ prepared by Purchasing Services or Waiver of Competition form •Requisition and Purchase Order (PO) •Vendor setup forms: W-9, HUB Form, & ACH	•Invoice •W-9 •Quote or agreement signed by SOG Services Director •Statement of Work (recommended)	•Invoice •W-9 •Quote or agreement signed by Foundation Director/Dean •Statement of Work (recommended)
Goods or Services exceeding \$100,000	•3 quotes through official University RFQ prepared by Purchasing Services or Waiver of Competition form •Requisition and Purchase Order (PO) •Detailed Statement of Work •Vendor setup forms: W-9, HUB Form, & ACH •Detailed Evaluation criteria	•Invoice •W-9 •Quote or agreement signed by SOG Services Director •Statement of Work	•Invoice •W-9 •Quote or agreement signed by Foundation Director/Dean •Statement of Work
HOTEL AND CATERING AGREEMENTS			
Hotel, Catering, and other Agreements	See requirements for "Goods or Services" above	Signed by SOG Services Director	Signed by Foundation Director
TRAVEL			
Travel	•Travel Request prior to travel for over night travels through Concur •Direct travel expenses paid for with T&E card •Expense Report through Concur, including per diem and mileage reimbursement	•Documented Travel Approval from Supervisor •Direct travel expenses paid for with Ramp Credit Card •Per diem and mileage reimbursement issued through Concur, travel request needed for overnight travel	•Documented Travel Approval from Supervisor •Direct travel expenses paid for with Civic Credit Union Credit Card •Per diem and mileage reimbursement issued through Concur, travel request needed for overnight travel

Microsite

General Process and Expectations

- **What you can do:** as soon as you know you need to make a purchase, hire a speaker or other contractor, or need a contract signed, let us know. More notice is always better!
- **What we will do:**
 - We will review your request and let you know if any additional information is needed
 - We will send you the appropriate forms or advise you of the best purchasing method
 - For contracts, we will negotiate terms and route for signature
 - We will keep you informed along the way until your request is resolved



Everything you need!

[HTTPS://WWW.SOG.UNC.EDU/RESOURCES/MICROSITES/OFFICE-BUSINESS-AND-FINANCE/](https://www.sog.unc.edu/resources/microsites/office-business-and-finance/)

- **Business Services**
- Grants and Budgeting
- Human Resources
- SOG Services



The screenshot displays the UNC School of Government website. The top navigation bar includes the UNC logo, the text 'SCHOOL OF GOVERNMENT', and a search bar. Below this, a secondary navigation bar lists various categories: 'Public Officials', 'Topics', 'Courses', 'Publications', 'Blogs', 'Resources', 'Giving', 'Knapp Library', and 'MPA Degree'. The main content area features a large image of hands shaking over a desk with a calculator, a coffee cup, and a smartphone. Below the image, the text 'MICROSITE' is followed by the title 'Office of Business and Finance'. A horizontal menu below the title includes 'Overview', 'Contributors', and 'Roles / Topics'. The 'Our Mission:' section describes the office's commitment to providing high-quality business, finance, and human resources services. The 'Core Services Include:' section lists 'Business Efforts' such as Accounts Payable, Accounts Receivable, Deposits, Processing of Independent Contractors, and Travel. On the right side of the page, a vertical sidebar menu lists various services and resources, including 'TICKETING SYSTEM', 'Submit a Ticket', 'FAQ', 'BUSINESS SERVICES', 'Hotel Contracts', 'Catering Services', 'Independent Contractors Speakers', 'Order Supplies', 'Reimbursements', 'Goods or Services More', 'Travel Expenses', 'Non-UNC Employee Trav', 'Third Party Lodging', 'Cash Advance', 'Resources and Forms', 'FAQ', 'GRANTS AND BUDGET', 'Training & Advising Servi', 'Funding Types', and 'General Information'.

Everything you need!

[HTTPS://WWW.SOG.UNC.EDU/RESOURCES/MICROSITES/OFFICE-BUSINESS-AND-FINANCE/](https://www.sog.unc.edu/resources/microsites/office-business-and-finance/)

- **New pages:**
 - Alcohol
 - Business Meals
 - Cash Advances
 - Student Funding
 - FAQ
 - Feedback



The screenshot displays the UNC School of Government website. At the top, the logo "NC SCHOOL OF GOVERNMENT" is visible on the left, and a search bar is on the right. A navigation menu includes links for "Public Officials", "Topics", "Courses", "Publications", "Blogs", "Resources", "Giving", "Knapp Library", and "MPA Degree". Below the navigation, a breadcrumb trail reads "Microsites | Office of Business and Finance | Office of Business and Finance". A large image shows several hands shaking over a desk with a calculator, a coffee cup, and a smartphone. Below the image, the text "MICROSITE Office of Business and Finance" is displayed, followed by a sub-menu with "Overview", "Contributors", and "Roles / Topics". The "Our Mission:" section states that the office is dedicated to providing high-quality business, finance, and human resources services. The "Core Services Include:" section lists "Business Efforts" such as Accounts Payable, Accounts Receivable, Deposits, Processing of Independent Contractors, and Travel. On the right side of the page, a vertical menu lists various services: "TICKETING SYSTEM" (Submit a Ticket, FAQ), "BUSINESS SERVICES" (Hotel Contracts, Catering Services, Independent Contractors Speakers, Order Supplies, Reimbursements, Goods or Services More, Travel Expenses, Non-UNC Employee Travel, Third Party Lodging, Cash Advance, Resources and Forms, FAQ), "GRANTS AND BUDGET" (Training & Advising Services, Funding Types, General Information).

Purchases over \$5,000

Purchase Orders

- Purchases \$5,000 or greater require prior approval from campus via a requisition and purchase order.
 - [Requirements depend on the purchase amount:](#)
 - Between \$5,000 and \$25,000
 - Between \$25,000 and \$100,000
 - Greater than \$100,000
- Let us know as soon as possible by submitting a ticket!



Independent Contractors

Independent Contractors

- Submit all contractor requests through our [online form](#) **before work starts**
- Contractor types
 - Speakers
 - Community Collaborators
 - Consulting
- Former/current UNC employees
- Background checks
- Reimbursing Expenses*



Alcohol and Business Meals Policy

Alcohol Policy and Procedure

- **Alcohol Purchases**

- Must be funded by an allowable funding source
- Must adhere to the policies and standards detailed in the [University Alcohol Policy](#).
- May only be purchased from and distributed by a third-party vendor such as a professional caterer, bartender, or food & beverage establishment, with proper licensing and liability insurance. Includes events held both on-campus and off-campus.
- Alcohol may not be purchased from a package store, convenience store, grocery store, or other vendors except for those detailed above.

- **Procedure**

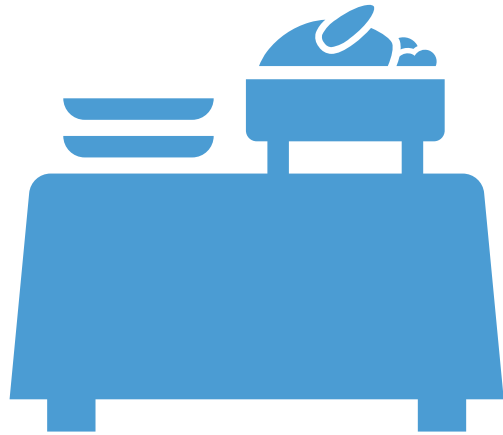
- Complete the [request form](#)
- Submit to the Business Office via the ticketing system
- We will coordinate signatures and submission to the Provost's office



Business Meals

- **Policy**

- Occur when hosting a group of individuals for a specific business purpose and the meal is provided as a part of that business meeting.
- Funding for business meals is limited, and not all fund sources may pay for business meals
- Business meals are not the same as personal meals while traveling



- **Allowable payment methods**

- SOG Credit card (look up which kind to use)
- Invoice from vendor
- If greater than \$5,000 a purchase order may be required

- **Required Documentation**

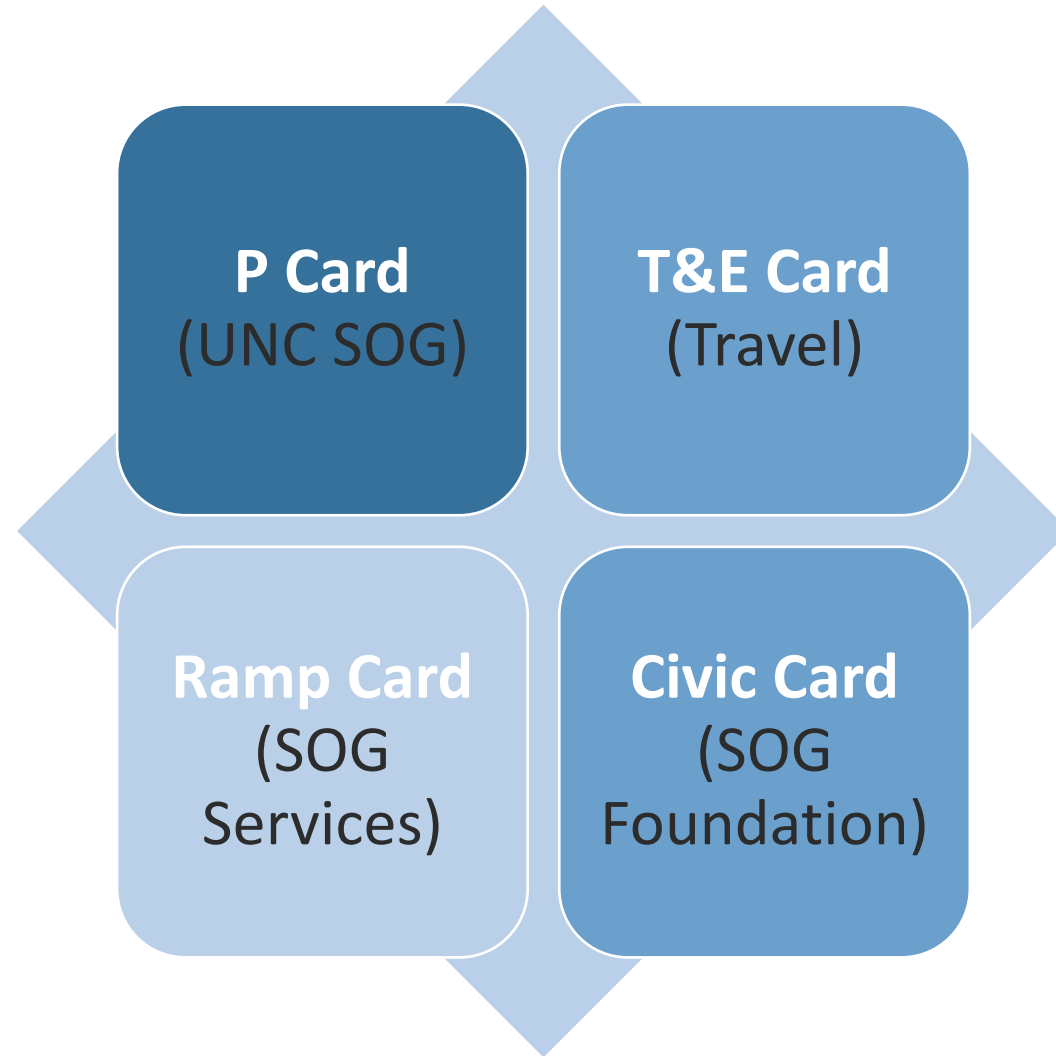
- List of participants
- Business purpose justification
- Receipts

Credit Cards

UPDATES

CREDIT CARDS

- One School – 4 Credit Cards!



P-card

T&E Card

SOG Services Card

SOG Foundation Card

UNIVERSITY MANAGED

- Business meals, catering, and entertainment (no alcohol)
- Conference registrations
- Professional Membership Dues
- Advertising
- Conference calls
- Copying/framing/photo
- Background checks
- Inventory purchases
- Newspaper, magazine, online subscriptions
- Postage/shipping
- Rentals (no contracts)
- Services from a vendor
- State contract purchases
- Supplies
- Utilities

BOA Works

- Business meals, catering, and entertainment (including alcohol)
- Conference registrations
- Professional Membership Dues
- Airfare
- Lodging
- Parking
- Rental vehicles and ground transportation
- Gas for rental vehicles
- Uber and Lyft
- Wifi costs (if necessary for conducting business)

SAP Concur

SCHOOL OF GOVERNMENT MANAGED

- Business Expenses for Courses:
 - Airfare
 - Registration
 - Baggage
 - Internet
 - Parking
 - Taxi/Rental Car, including gas
 - Lodging
 - Meals and entertainment for courses
 - Supplies
 - Postage/shipping
 - Services from a vendor
 - Printing

QB/Civic

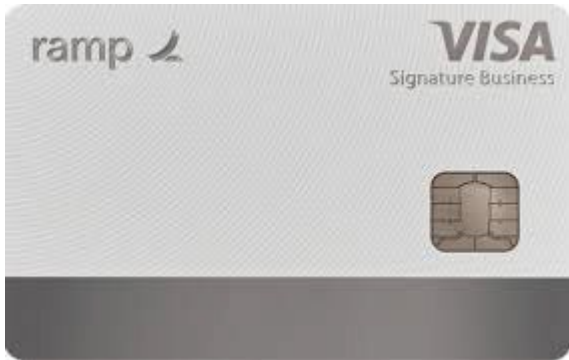
- Business Expenses for Fundraising and Advancement:
 - Airfare
 - Registration
 - Baggage
 - Internet
 - Parking
 - Taxi/Rental Car, including gas
 - Lodging
 - Meals and entertainment for courses
 - Supplies
 - Postage/shipping
 - Printing

QB/Civic

Ramp Credit Cards

What is Ramp?

ramp 



- Ramp is the Corporate Credit Card Provider for SOG Services, Inc.
- Ramp's online platform is used to manage cards, cardholders, and for reconciling and reporting credit card transactions

When can I use my Ramp Card?

THE CARD IS TO BE USED STRICTLY FOR SOG SERVICES BUSINESS. NO PERSONAL EXPENSES MAY BE CHARGED TO THE CARD. SEE CREDIT CARD AGREEMENT FORM FOR MORE DETAILS

- Course Expenses
 - Check the Master Course List or Event Dashboard
 - Any purchases for courses listed under “SOG Services” can be made with a Ramp Card
 - Travel by SOG Services employees for courses
- General School Expenses
 - Purchases that carry school-wide benefits, like supplies, IT subscriptions, etc can be made with a Ramp Card
- Affiliated businesses:
 - NCCCMA
 - CUPSO

How to Access Your Account

[HTTPS://APP.RAMP.COM/SIGN-IN](https://app.ramp.com/sign-in)

- Login with your SOG email address and password you created at account set up
- Once logged in, you'll see your Cards and any transactions that require your attention

The screenshot displays the 'My Ramp' dashboard. At the top right, there are buttons for 'Reimbursements' and 'Request Card'. Below this, there are two card status boxes: 'Physical card in Transit' and 'Virtual - 1341 IT Subscriptions' (with a 'NEW!' tag) showing a balance of \$1,754.23 and a limit of \$2,500 / Month. Next to it is 'Virtual - 2654 Replacement Laptop' showing a balance of \$1,346.12 and a limit of \$1,500 / Month. A search bar for transactions is present. Below the search bar, summary statistics show 78 transactions, 4 missing items, and a total spend of \$3,567.12. A table of recent transactions is shown with columns for 'Attachments' and 'Amount'. The transactions listed are: 1 Password (SaaS / Software) for \$50.17, BestBuy (General Merchandise - 2654) for \$1,346.12, Webflow (SaaS / Software) for \$456.87, and Asana for \$46.12. A small image of a card is visible in the background of the transaction list.

Attachments	Amount
	\$50.17
	\$1,346.12
	\$456.87
	\$46.12

How to Reconcile Expenses

- You are required to add receipts to your transactions within 10 days of making a purchase.
- Your card will be auto-locked if a purchase is not reconciled after 60 days.
- Upload a receipt, memo, and provide the cost code, if applicable. We'll take care of the rest!

After your transaction, you can send your receipts to Ramp in a few ways:

Channel	Receipts	Memos
SMS	Text us at HIRAMP (447-267) - we will match	Text us - we will add the memo to the last transaction
Email	Forward to receipts@ramp.com	Add "memo: <i>enter your memo</i> " in the body of the email
Ramp.com	Click into the transaction or missing items section and upload the receipt	Click into the transaction or missing items section and add memo
Slack	Send your receipt to the Ramp app on Slack (Simple type /ramp , press enter, then attach a picture of your receipt to the next message)	Add a memo when Slack app prompts you to (after receipt has been matched)

Travel

UNC Employees: Travel with your T&E Card and Concur

- Prior approval from supervisor is required via Concur
- Book travel w/ T&E card, including lodging, airfare, fees, rental cars, and registration fees
- Meals are reimbursed at the federal per diem rate
- Mileage is reimbursed at the federal rate
- Request reimbursement after your trip using Concur
 - Reimbursement will be paid via direct deposit



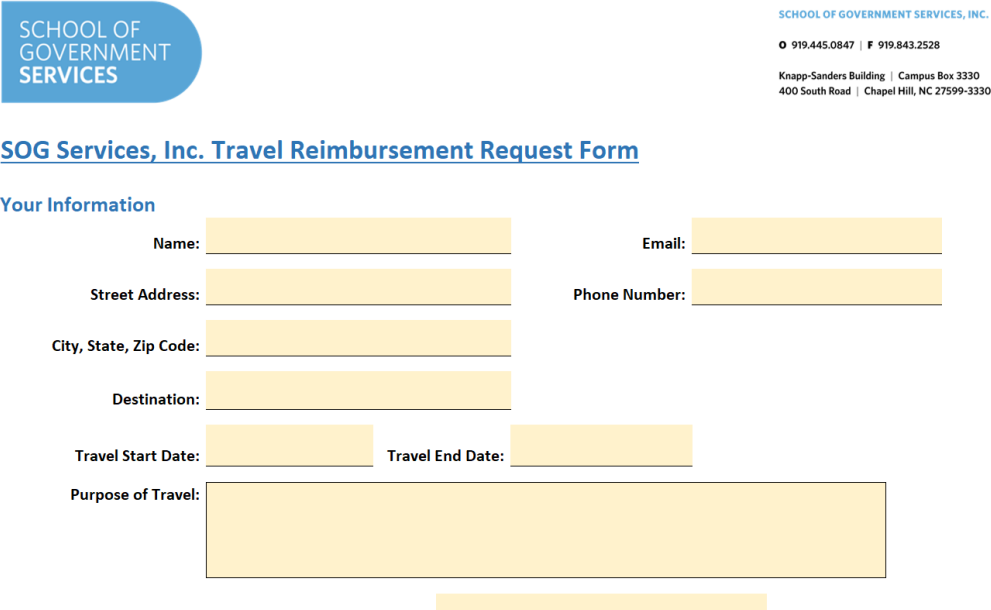
A screenshot of the SAP Concur web application interface. The top navigation bar includes "SAP Concur" and menu items for "Requests", "Travel", "Expense", "Approvals", and "App Center". On the right, there are links for "Support" and "Help", and a user profile dropdown. Below the navigation bar, the user's identity is shown as "THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL". A dashboard displays key metrics: "+ New", "00 Required Approvals", "00 Authorization Requests", "00 Available Expenses", and "00 Open Reports". The main content area is divided into sections: "TRIP SEARCH" with icons for flight, car, hotel, and train, and a "Mixed Flight/Train Search" form with fields for "From" and "To" and a "Search" button; "ALERTS" with two informational messages; "COMPANY NOTES" featuring a "Southwest Spring Sweepstakes" banner with a QR code and a "Read more" link; and "MY TASKS" with three task cards, each showing a "00" count.

SOG Services Employees: Travel with your SOG Services Ramp Card

Policy/Process – SOGS Travel Policy

- Prior approval from supervisor is required (via email is fine)
- Book travel w/ Ramp card, including lodging, airfare, fees, rental cars, and registration fees
- Meals are reimbursed at the federal per diem rate
- Mileage is reimbursed at the federal rate
- Request reimbursement after your trip using the SOG Services Reimbursement Form
 - Reimbursement will be paid via check

Reimbursement Form



The form is titled "SOG Services, Inc. Travel Reimbursement Request Form". It features a blue header with the "SCHOOL OF GOVERNMENT SERVICES" logo on the left and contact information on the right. The contact information includes the phone number 919.445.0847, fax number 919.843.2528, and the address: Knapp-Sanders Building | Campus Box 3330, 400 South Road | Chapel Hill, NC 27599-3330. The form itself is titled "Your Information" and contains several input fields: Name, Email, Street Address, Phone Number, City, State, Zip Code, Destination, Travel Start Date, and Travel End Date. A large text area is provided for the "Purpose of Travel".

SCHOOL OF GOVERNMENT SERVICES

SCHOOL OF GOVERNMENT SERVICES, INC.
O 919.445.0847 | F 919.843.2528
Knapp-Sanders Building | Campus Box 3330
400 South Road | Chapel Hill, NC 27599-3330

SOG Services, Inc. Travel Reimbursement Request Form

Your Information

Name: Email:

Street Address: Phone Number:

City, State, Zip Code:

Destination:

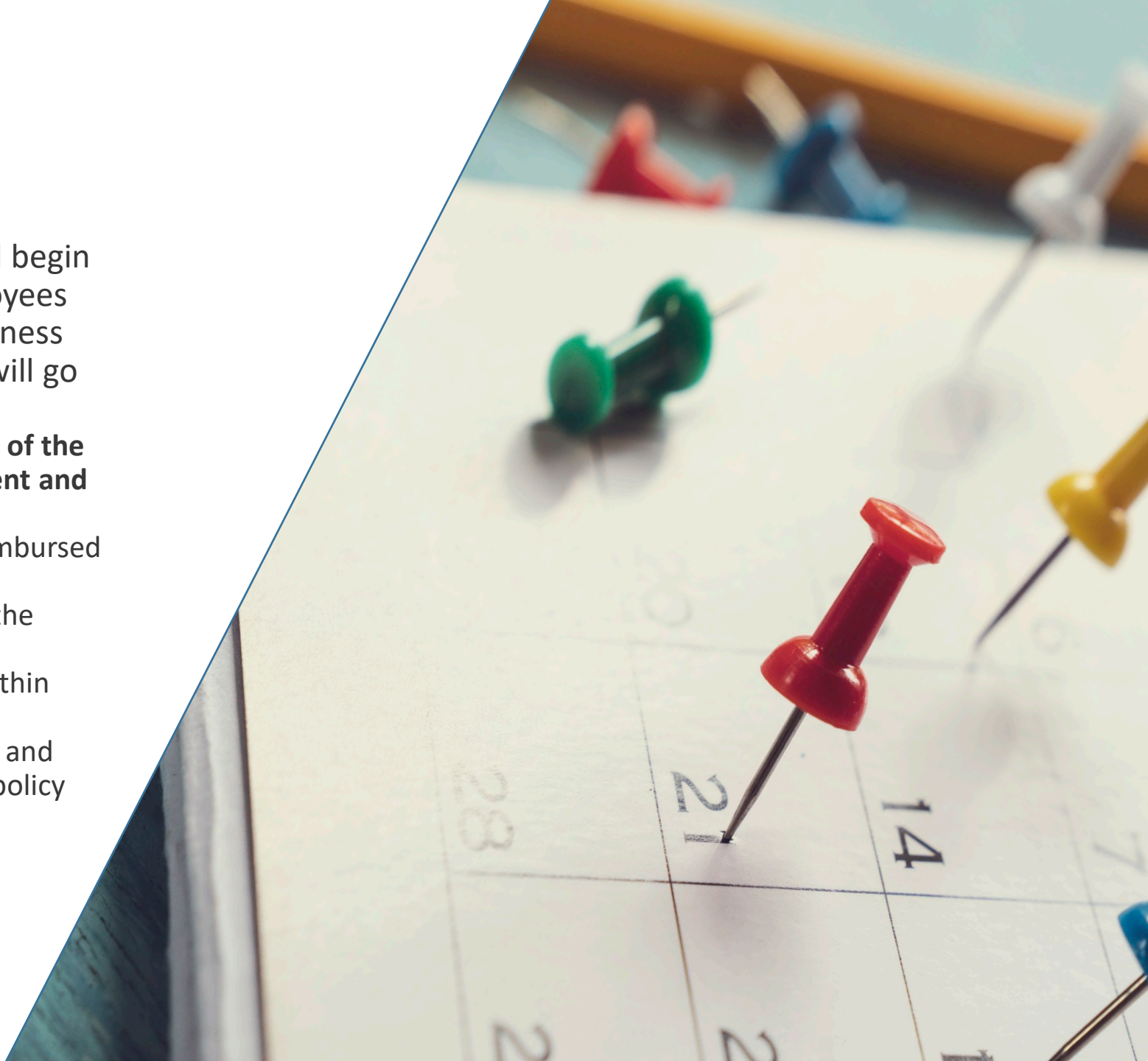
Travel Start Date: Travel End Date:

Purpose of Travel:

Reimbursement Cutoff

To comply with IRS rules, the University will begin to enforce a firm cutoff for how long employees are able to request reimbursement for business expenses, including travel. These changes will go into effect January 1, 2024.

- **Requests must be submitted within 60 days of the trip end date to be eligible for reimbursement and for the reimbursement to be non-taxable.**
- Requests submitted after 60 days will be reimbursed but may be taxable.
- Requests submitted 180 days or more after the expense is incurred will not be reimbursed.
- Charges on T&E Cards must be reconciled within these deadlines.
- Please see [this memo](#) from the UNC Finance and Budget Office for more information; formal policy and procedure updates are coming soon.



Concur Reminders

- Expense approval times are currently 4+ weeks
 - Email Hector if you have an urgent Request
- Walkme Virtual Assistant
- Standard description format for request and expense reports:
 - [Last Name], [First Initial] [Travel Date] [Purpose and/or Destination]
 - ex: Doe, J 10/31/23 ABCD Conf
 - *Note: there is a 32-character limit. Fit as much as you can.*



Course Closeout Process

SOG Services Employees: Travel with your SOG Services Ramp Card

Policy/Process – Course Closeout Process

- Ensure timely submission/reconciliation of expenses
- Automated Approval Task in Teams
- Check Closeout Dashboard in Tableau
- Send Feedback to Traci Forchette

CLOSEOUT DASHBOARD

Basic Economic Development Course

Fulton, Jennifer L

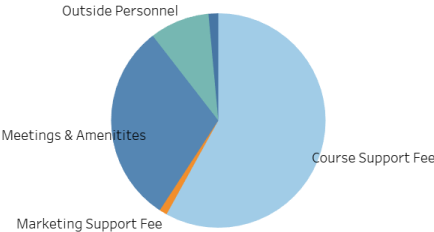
MORGAN, JONATHAN Q

August 3, 2023

Financial Summary

Expense	Revenue	Grand Total
(\$53,745)	\$76,770	\$23,025

Expense Type

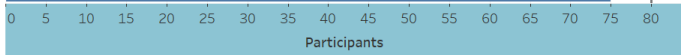


Budget to Actual

Revenue & Expenses



Participants



Support Fees

CSF Rate	StratComm Package	Category	Description	Participants	Days	Actual Amount
General (\$69)	Plus	Course Support Fee	113 Registrants, 4 days, \$69 Rate	75	4	\$31,188
		Marketing Support Fee	Plus stratcomm package	75	4	\$630

Sponsorships

Audits

Coming Soon

- Fiscal Year End
 - Deadlines
 - Course Expense Review
- Course Closeout Process
- Service Agreements
- Additional Business Office Team member



Resources

Resources

- Tableau – there's a dashboard for that!
 - [Event Dashboard](#)
 - [Course Closeout Dashboard](#)
- [Concur](#) Trainings
 - Travel Allowance Wizard
 - Expense Reports
 - Booking Travel

Questions