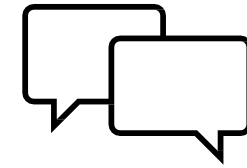


# Business Office Update and Q&A

November 4, 2024

# We're here to help!



Message us on Teams



Email us



Create a Help Ticket

# 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



# 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](mailto: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 page features a dark navigation sidebar on the left with links for Home, Downloads, My Computer, License Keys, Service Desk, Knowledge Base, and Download History. The main content area is titled 'Quick Actions' and includes a blue button with a white warning icon and the text 'Have a problem? Report it'. Below this is a 'Tickets' section with a table listing open tickets. The table has columns for 'Number', 'Please give us a short description of your problem', and 'Status'. Three tickets are visible, 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

# Unauthorized Commitments

# Unauthorized Commitments

**“All purchase contracts entered into on behalf of the University are the exclusive responsibility of Procurement Services. An agreement that is not binding solely because the University representative who made it lacked the authority to enter into the agreement on behalf of the University is termed an “unauthorized commitment” and is in direct violation of North Carolina General Statute § 143-58”**



# Unauthorized Commitments

- What to look for:
  - Appropriate approval from SOG business office and/or campus prior to work starting for vendors or independent contractors (including speakers)
  - Contracts or agreements are reviewed and signed by authorized official (hint: it's not you!)
- Resources:
  - [Memo from UNC Finance and Operations](#)
  - [Disposition of Unauthorized Commitment form](#)
  - [Policy on unauthorized purchases](#)



# Paying People



# Need to pay someone? It's complicated....



Independent Contractor	Vendor	Adjuncts	UNC/State Employees	Former Employees
<p>An individual who is not an SOG or UNC employee, is independent of a company*, and is paid as an individual.</p>	<p>An individual who has their own company* or is working on behalf of a company (for example, a consulting firm) and is paid as a vendor with payment to that company (rather than payment to the individual as an independent contractor).</p>	<p>Individuals who have been hired in an adjunct faculty role who regularly teach courses for the School. They may also be adjunct faculty in other departments at UNC. These individuals are employees of the University and payment is managed by the HR department.</p>	<p>Employees of other State Agencies, including other Universities in the UNC System. These individuals are paid through the dual employment process, which allows us to pay an additional lump sum through their regular paycheck.</p>	<p>An individual must be off UNC CH payroll for 12 months to be paid as an Independent Contractor. If the person was on UNC CH payroll (a recent retiree for example), the HR department will assist in rehiring the individual into an employee role.</p>

# Need to pay someone? It's complicated....



**\*Some companies are still considered independent contractors, depending on their tax classification:**

Q. Is a single-member limited liability company (LLC) an independent contractor?

A. Yes. An LLC can be one of four types:

- a single-member,
- C corporation,
- S corporation, or
- P partnership.

**If the LLC is a single-member LLC, they are an independent contractor, and UNC will issue Form 1099.** Single-member LLCs can use either their social security number or an employer identification number (EIN) for tax reporting and Form 1099.

LLCs that are C corporations, S corporations, or P partnerships are not independent contractors.

# Affiliate Matrix

- Your guide to the options for hiring anything other than a permanent employee:

Temporary Employee

Independent Contractors

Research Assistants

Graduate Assistants

Visiting Scholars

Research Collaborator

Fellow (Unpaid)

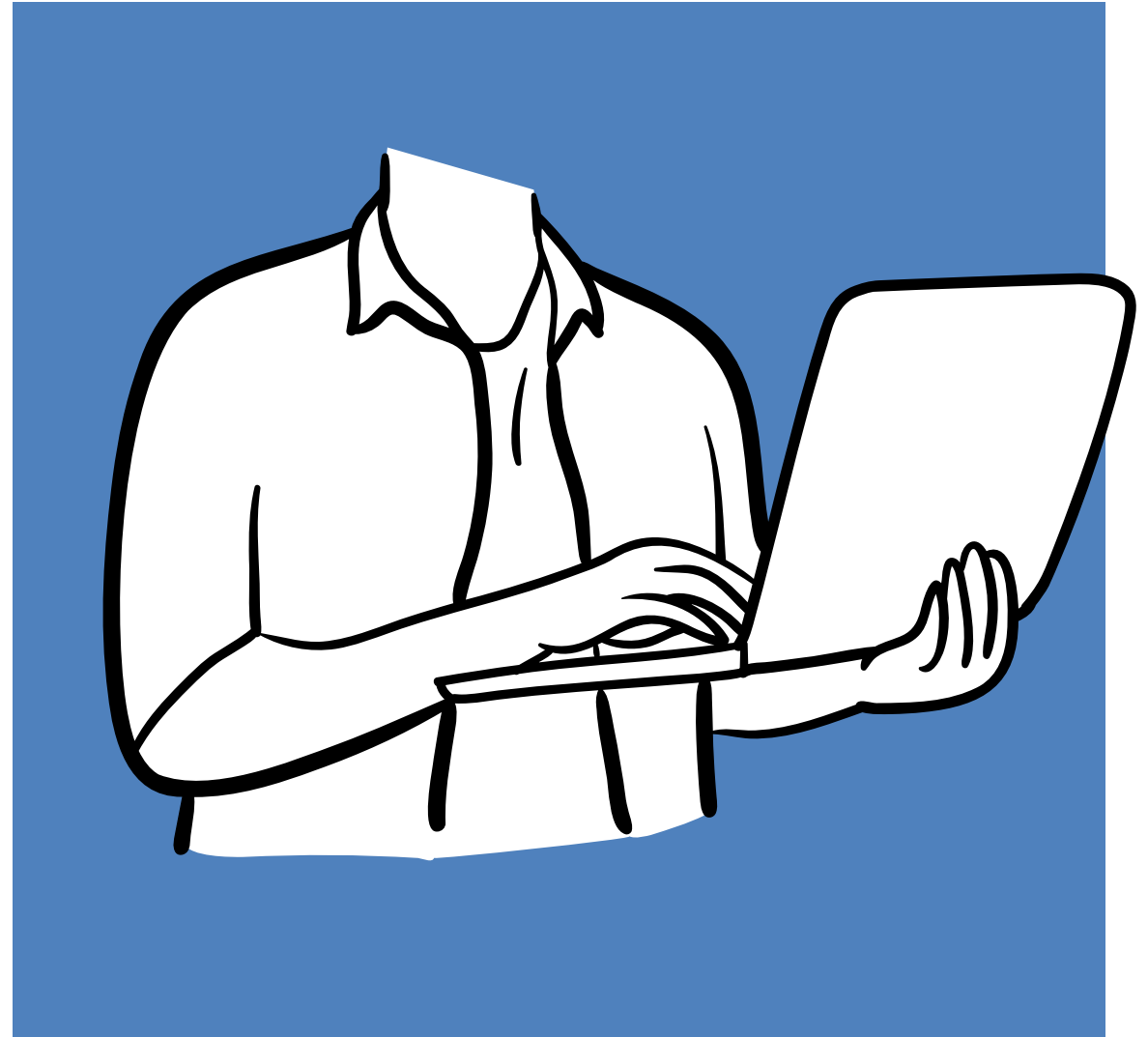
Intern

[SOG Affiliate Matrix](#)



# Independent Contractors

- **Submit all contractor requests through our [online form](#) *before work starts***
- **Contractor types**
  - Speakers
  - Community Collaborators
  - Consulting



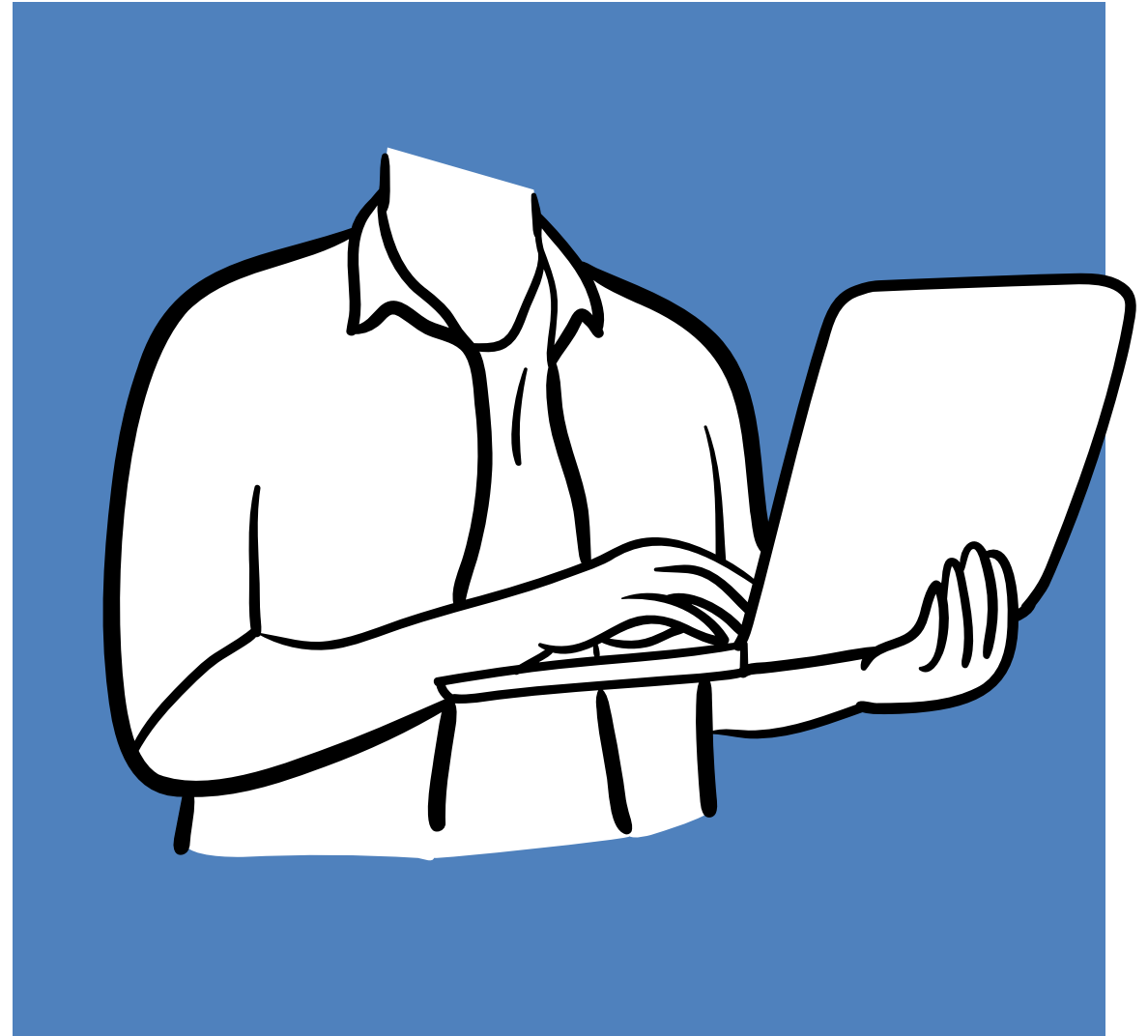
# Independent Contractors

- **For UNC Independent Contractors, be aware:**
  - Background checks – **contingent offer letter**
  - Vendor Registration system
  - Data protection checklist
  - Direct Deposit required for data/website design



# Independent Contractors

- **Payment cannot be issued without an invoice**
  - **Include documentation for travel reimbursements – follow UNC mileage and per diem rules**
- **New agreements are needed for each project/engagement**



# Non-Employee Travel

## Policy/Process – Non-Employee Travel

- When a non-employee travels, all receipts of expenses incurred during travel should be submitted via ticketing system. Meals and mileage are reimbursed at [rates established by the University](#).
- For mileage, include map of full round-trip mileage. Mileage up to 350 miles is reimbursed at \$0.67 and anything more is reimbursed at \$0.335
- Collect receipts and complete the non-employee travel reimbursement form
- Submit to the business office ticketing system along with source of funding
- Business office will initiate an invitation to PaymentWorks to collect W-9 from the individual

## Reimbursement Form

### **SOG/SOGS Non-employee Travel Reimbursement Request Form**

Name
Street Address (Home)
City, State, Zip Code
Email & Phone Number

To: BUSINESS OFFICE  
SCHOOL OF GOVERNMENT/SOGS  
CB# 3330, Knapp-Sanders Building  
UNC-Chapel Hill  
Chapel Hill, NC 27599-3330  
[sog\\_bod\\_tickets@sog.unc.edu](mailto:sog_bod_tickets@sog.unc.edu)

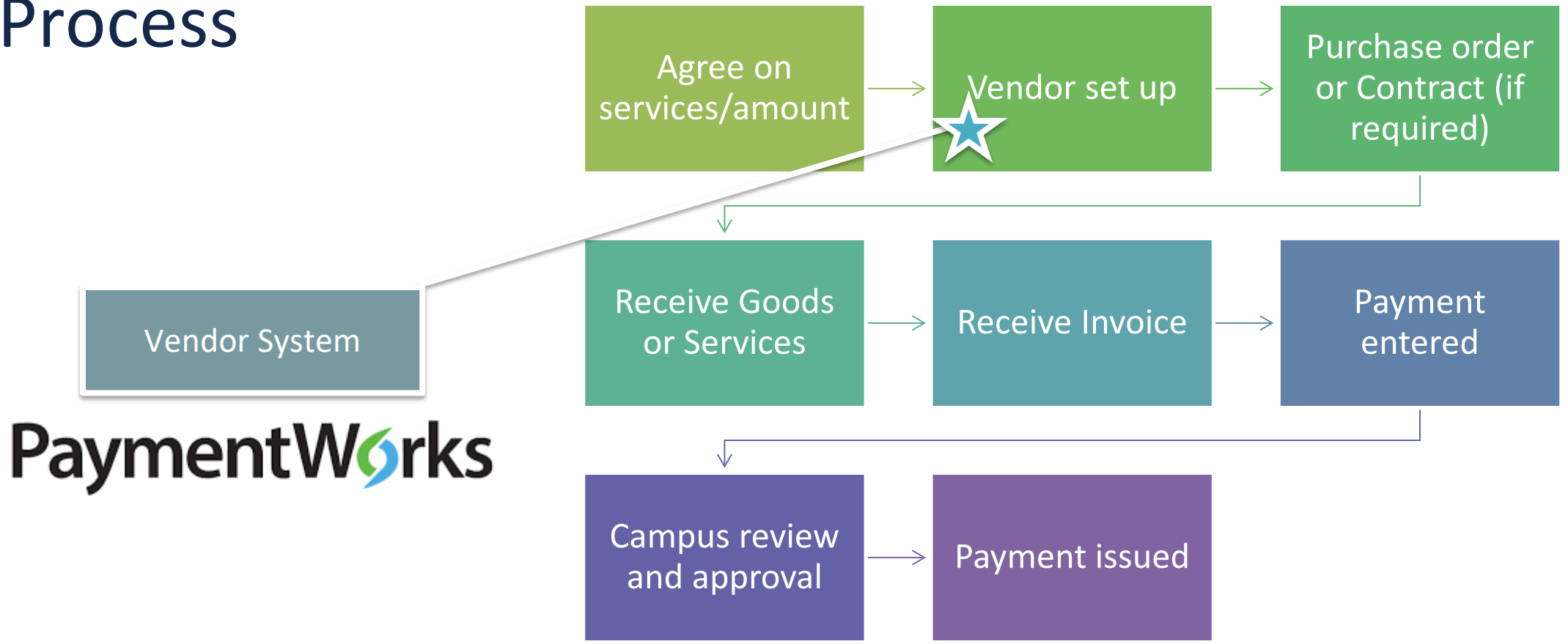
For: Services with dates

Honorarium: \$

# Paying Vendors



# The Process

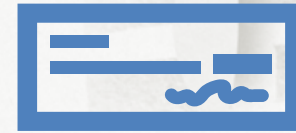


# Contracts with Vendors



## What to look for:

- Correct business name
- Authorized signatory
- Insurance requirements
- Tax exempt status
- Watch out for totals near or above \$5k



## Payment:

- Deposits – limited to 25% up front
- Invoices are required for payment

# Advanced Payments



- As a state entity, the University is not required to pay any amounts in advance of services being received.
- The University recognizes that for some services (esp catering & venue contracts), it is standard industry practice to request a deposit.
- The University is only authorized to pay advance deposits in an amount **not to exceed 25% of the estimated total for the event.**

# Purchase Orders

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**Purchases requiring contracts or those that are \$5,000 or greater require prior approval from SOG leadership and/or campus via a requisition and purchase order.**

**Let us know as soon as possible by submitting a ticket!**



# Purchase Orders

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- Requirements depend on the purchase amount:
  - Between \$5,000 and \$25,000
  - Between \$25,000 and \$100,000
  - Greater than \$100,000
- **Can include:**
  - Waiver of competition
  - Statement of Work
  - Data Protection Checklist for data or web design work



# Travel

# Travel Updates

## **Concur:**

- New look to Concur homepage
- Travel Allowance Upgrade
- Booking flights

## **Travel outside of Concur (for SOG Services and Advancement team):**

- Updated form available online



# Chartfield Strings



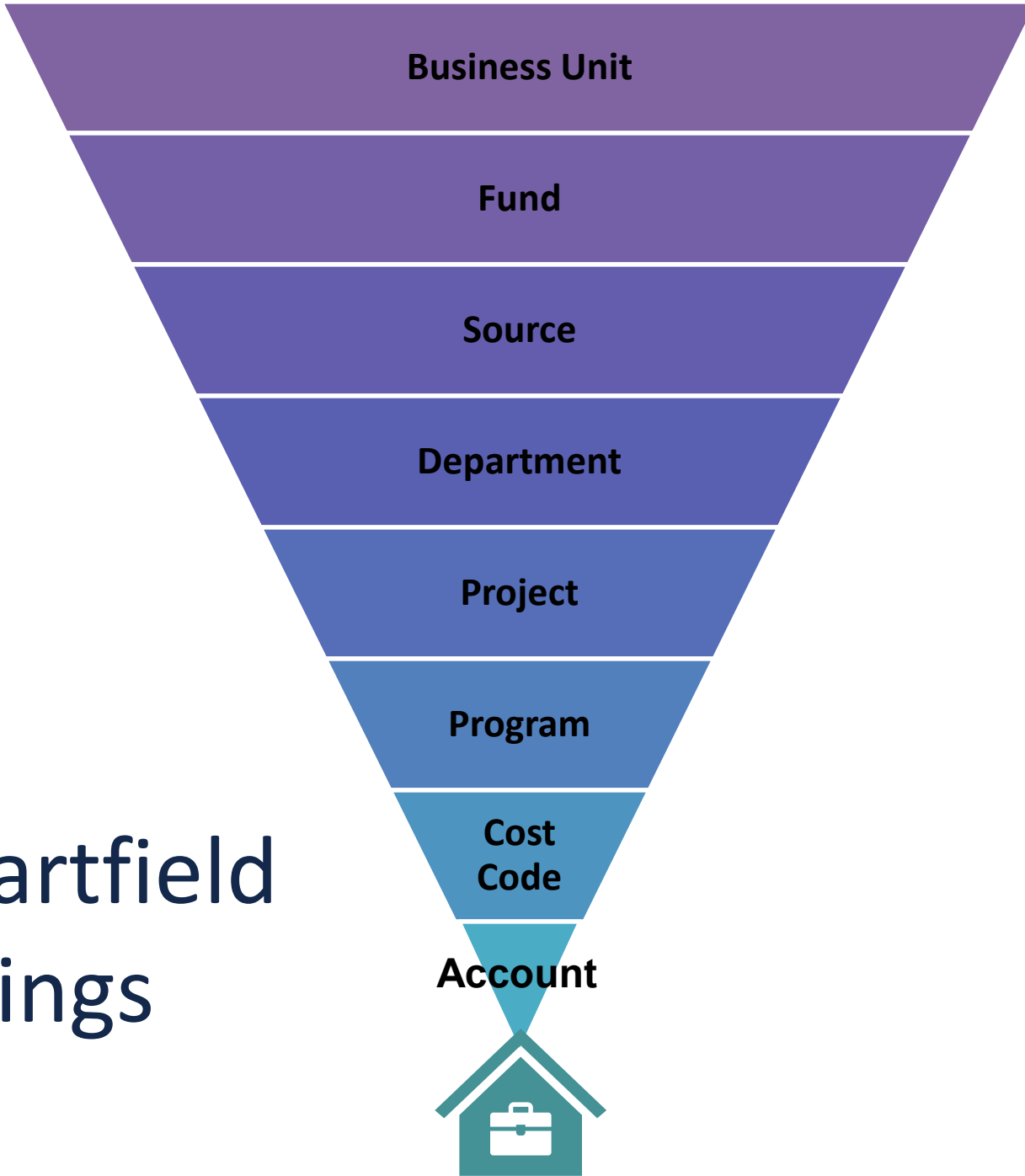
# Chartfield Strings:

Chartfields are the mechanism for categorizing and tracking all University financial transactions. A series of chartfields makes up a chartfield string, which is required on every transaction. A chartfield string answers several questions, including:

- Where is the money coming from?
- What is the general purpose for the funds?
- Who is spending the funds?



# Chartfield Strings



**CHGOV**

**SOG Foundation**

**29930**

**Unrestricted**

**G5002**

**SOG General Operating**

**375505**

**ncIMPACT**

**N/A**

**Not a grant**

**GCA10**

**Carolina Across 100**

**GCX100PRO2**

**Program 2**

**522922**

**Independent Contractor**

# Chartfield Strings:

## Resources

- [Chartfields 101 – Understanding ConnectCarolina Chartfields](#)
- Chartfield QRC <https://ccinfo.unc.edu/wp-content/uploads/sites/219/2014/05/Chartfield-QRC.pdf>
- [Chartfield Structure Booklet](#)
- [Funds and Matching Source Ranges](#)
- [Chartfields Webinar: Finding Your Chartfield Codes in ConnectCarolina](#)
- Chartfield checker: <https://ccinfo.unc.edu/finance/chartfield-checker/>
- [Using the Chartfield Checker Tool](#)



# Resources



# Operational Efficiency and Tools

## TICKETING SYSTEM

# TeamDynamix

- [New Ticketing System \(to replace KACE\) coming soon!](#)

## REPLACING OUR CUSTOMER SUPPORT TOOL

UNC has selected a new Customer Support Tool to replace ServiceNow. This phase of the project will include implementing TeamDynamix and closing out the ServiceNow platform and contract.

### THE BACKGROUND

The current ITS contract with [ServiceNow](#) expires in September 2024. During the RFP phase of the project in 2023, the RFP committee selected TeamDynamix to replace ServiceNow, as it meets the following needs:

- Fits our campus community better.
- Enhances the experience for campus customers and people using the tool to do their jobs.
- Provides better value for our UNC community.

### THE TIMELINE

**TeamDynamix Go Live:** July 10th  
**ServiceNow Decommissioning:** by September 6th

[Full project calendar available here.](#)

**Phase 1:** Building out TeamDynamix  
*Target Dates: 1/2/24 – 7/10/24*

**Phase 2:** Closing out ServiceNow  
*Target Dates: 7/10/24 – 9/6/24*

**Phase 3:** Continued TeamDynamix Buildout  
*Target Dates: 9/6/24 – 12/15/24*

# Business Office FAQ

- Answers to all your questions!
  - General Information
  - Credit Cards
  - Purchasing Alcohol
  - Hotel Contracts
  - Service Agreements
  - Independent Contractors
  - Travel

[Access the FAQ](#)



# Microsite: 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/)



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TICKETING SYSTEM

- Submit a Ticket
- FAQ

BUSINESS SERVICES

- Hotel Contracts
- Catering Services
- Independent Contractor 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

MICROSITE

## Office of Business and Finance

Overview Contributors Roles / Topics

**Our Mission:**  
The Office of Business and Finance at the School of Government is dedicated to providing high quality business, finance and human resources services to the School of Government community. Our mission is to ensure the integrity, accountability, and efficiency of all business, finance, and HR functions of the School. We do this by working collaboratively with the University and other state agencies to provide accurate and timely services in a courteous, cooperative and cost-effective manner.

**Core Services Include:**  
**Business Efforts:** Accounts Payable, Accounts Receivable, Deposits, Processing of Independent Contractors, and Travel

What's next?



# Save the Date

- **Next Business Office Update Session:**  
Monday Feb 3<sup>rd</sup> at 2pm
- **Travel/Concur Help Sessions:** Wednesdays  
from 3-4pm



# Questions