Business Office Update and Q&A

November 4, 2024

We're here to help!

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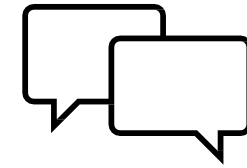
Message us on Teams

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!

- 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

UNC SCHOOL OF GOVERNMENT

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
An individual who is not an SOG or UNC employee, is independent of a company*, and is paid as an individual.	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).	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.	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.	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.

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
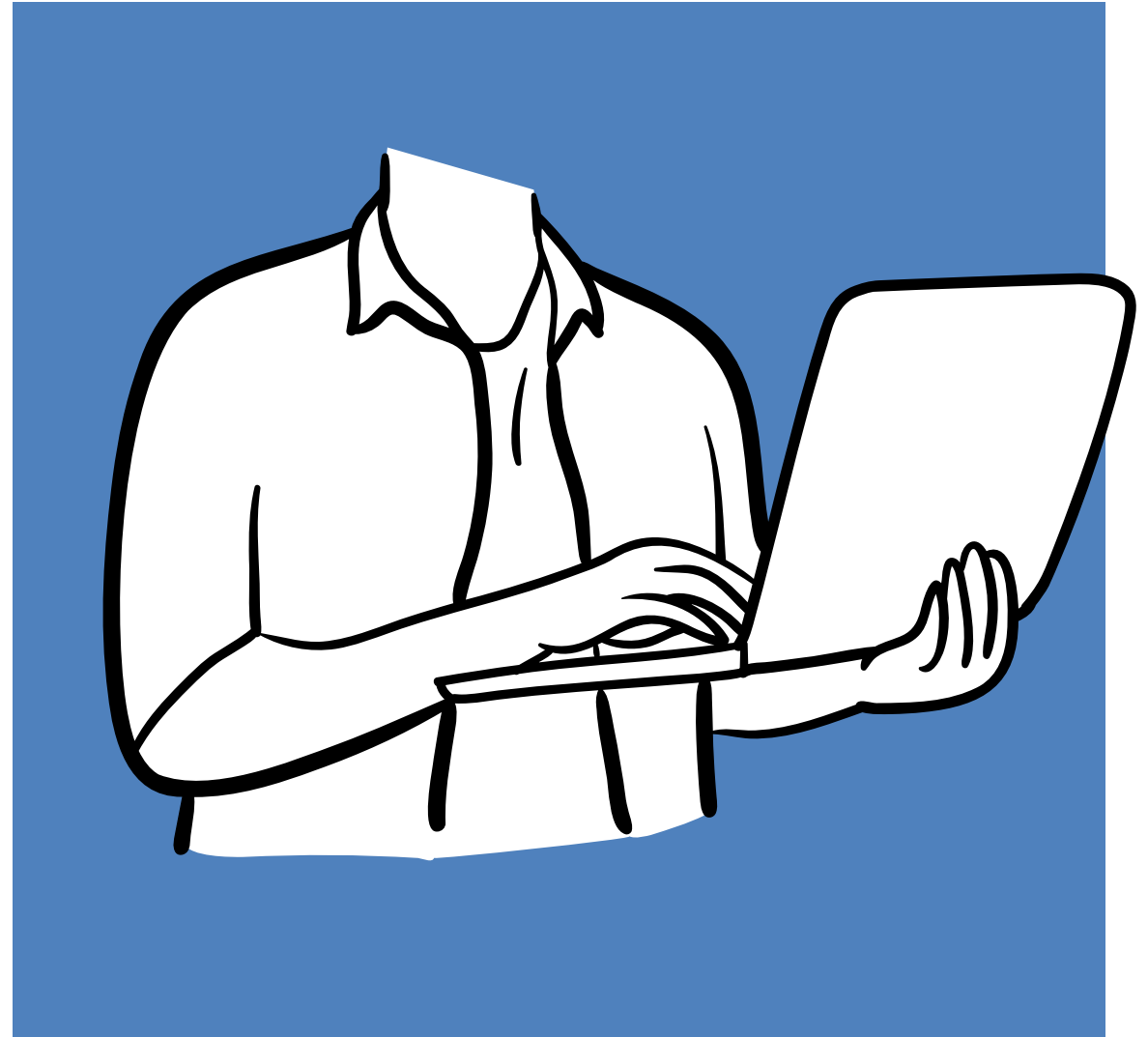   Research Collaborator
    Fellow (Unpaid)
    Intern

    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**
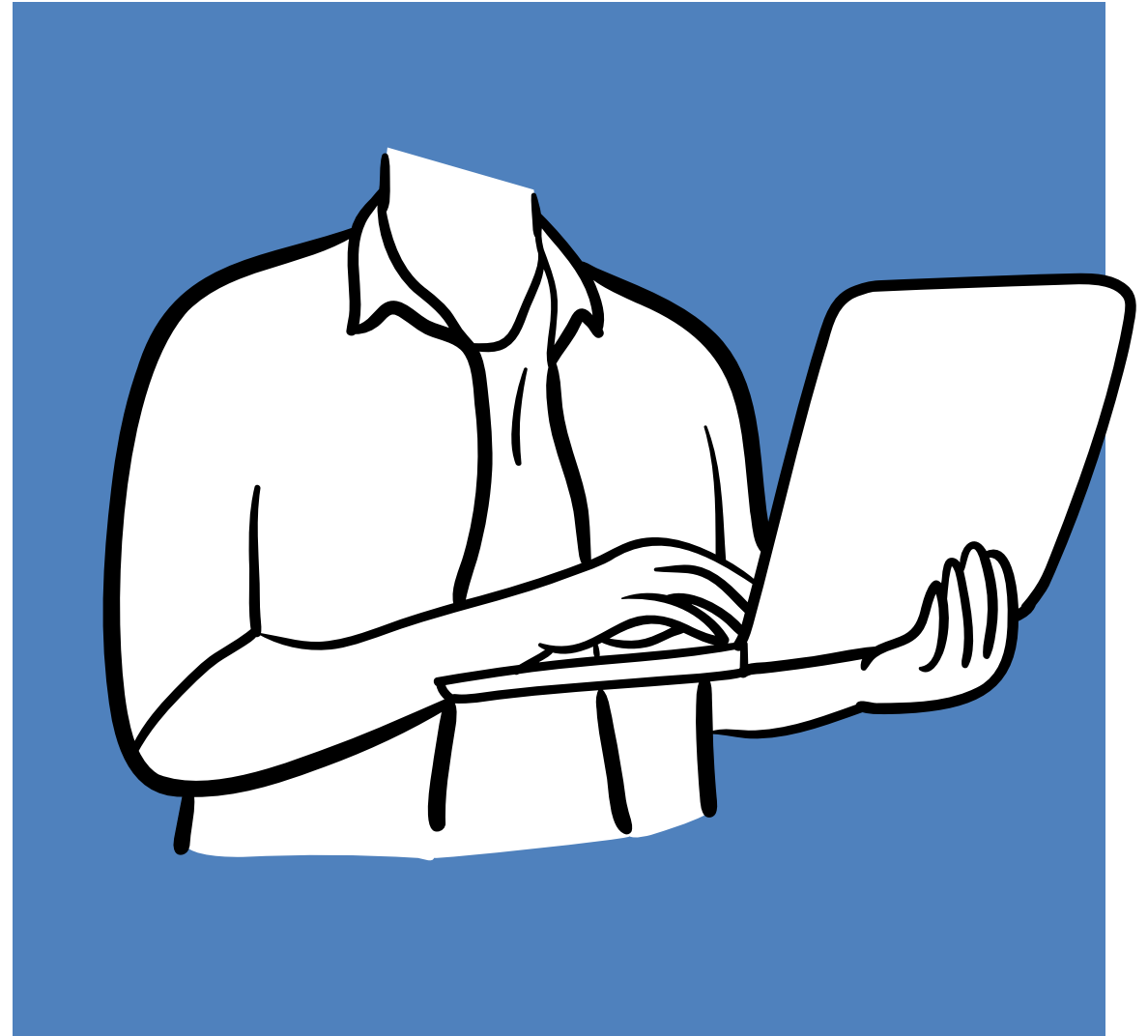
Non-Employee Travel

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

For: Services with dates_____

        Honorarium: $_____

Paying Vendors

The Process

Agree on services/amount → Vendor set up ★ → Purchase order or Contract (if required)

Vendor System
PaymentWorks

Receive Goods or Services → Receive Invoice → Payment entered
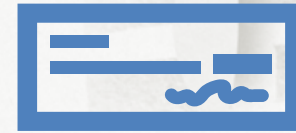
Campus review and approval → Payment issued
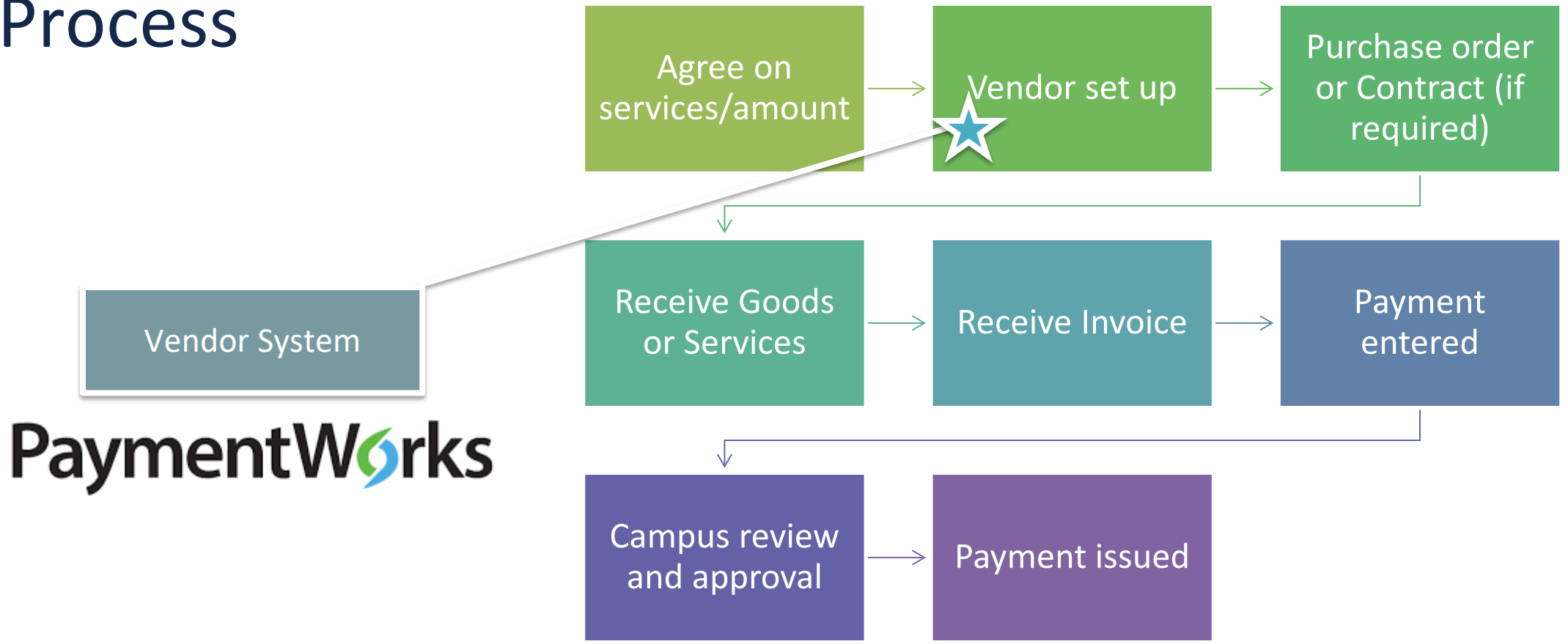
Contracts with Vendors

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

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

- **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
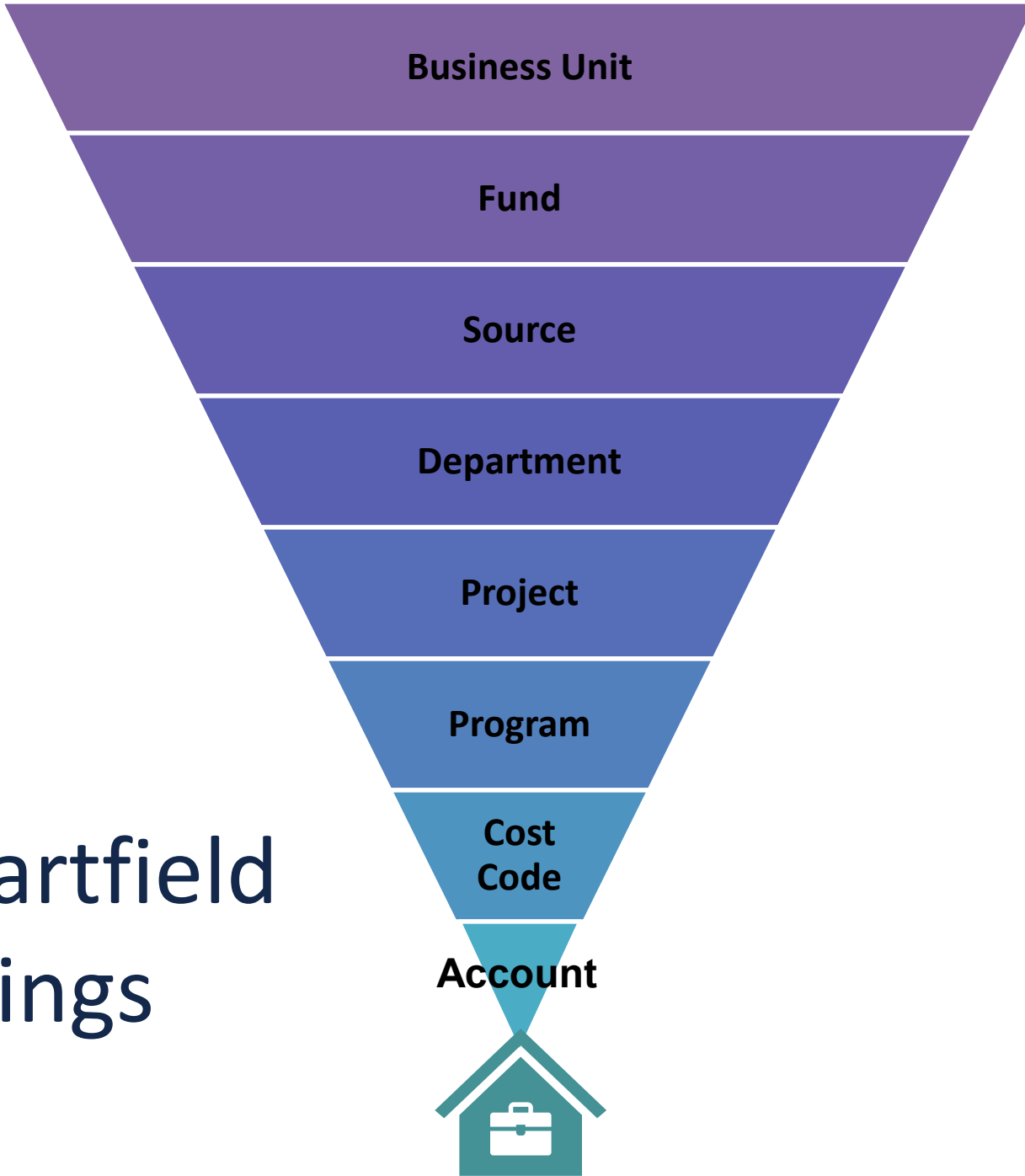
Level	Code	Description
Business Unit	CHGOV	SOG Foundation
Fund	29930	Unrestricted
Source	G5002	SOG General Operating
Department	375505	ncIMPACT
Project	N/A	Not a grant
Program	GCA10	Carolina Across 100
Cost Code	GCX100PRO2	Program 2
Account	522922	Independent Contractor

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](#)
- Chartfeld checker: https://ccinfo.unc.edu/finance/chartfield-checker/
- [Using the Chartfield Checker Tool](#)

Resources

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/M ICROSITES/OFFICE-BUSINESS-AND-FINANCE/](HTTPS://WWW.SOG.UNC.EDU/RESOURCES/MICROSITES/OFFICE-BUSINESS-AND-FINANCE/)

What's next?

Save the Date

- **Next Business Office Update Session:**
  Monday Feb 3rd at 2pm

- **Travel/Concur Help Sessions:** Wednesdays
  from 3-4pm

Questions