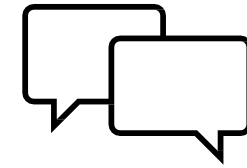


# Business Office Update and Q&A

August 12, 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

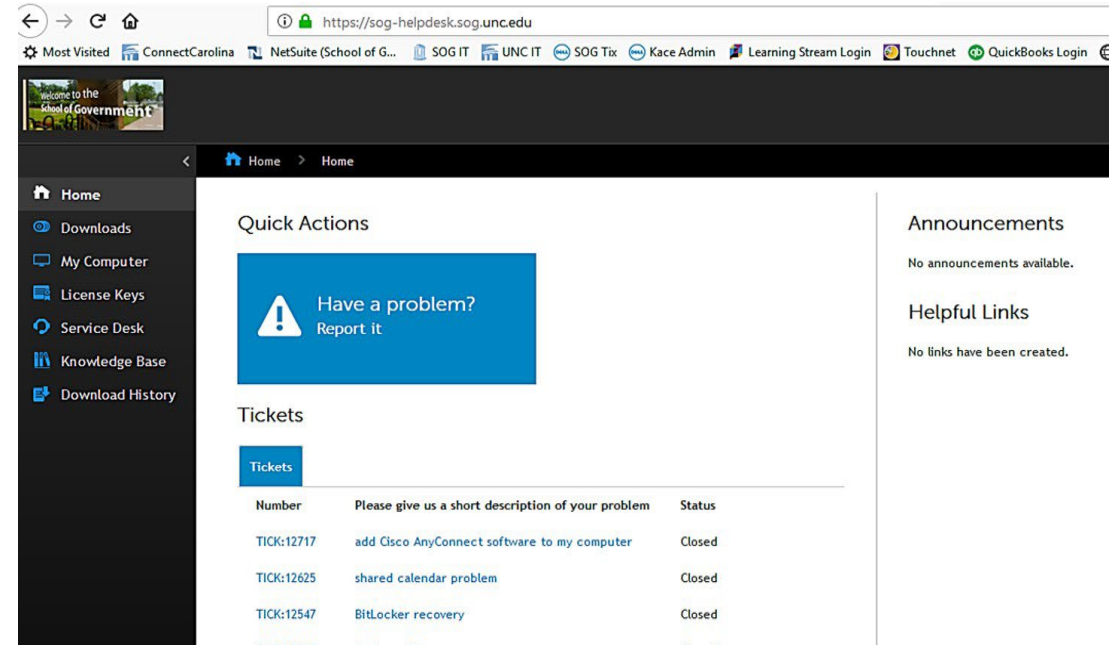


# We're here to help!

## 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 website has a dark header with a navigation menu on the left containing 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 listing several tickets. The table has columns for 'Number', 'Please give us a short description of your problem', and 'Status'. The tickets listed are: TICK:12717 (add Cisco AnyConnect software to my computer, Closed), TICK:12625 (shared calendar problem, Closed), and TICK:12547 (BitLocker recovery, Closed). On the right side of the page, there are sections for 'Announcements' (No announcements available) and 'Helpful Links' (No links have been created).

# Business Justifications

# When is a business justification required?

Justifications are required for any purchase made using University or SOG resources, regardless of procurement method. This includes:

- Expenses on any SOG credit card: Pcard, T&E card, Ramp Card, Civic Cards
- Expenses submitted for personal reimbursement
- Travel expenses
- Invoices paid to vendors
- Supplies ordered through BuyCarolina



# What should I include in my business justification?

- **Describe the purchase:** What was it? Why was it needed? For whom was the purchase made?
- **Benefit:** How did the purchase benefit the University?
- **Funding source:** Is there dedicated funding for the expense (i.e. for a course, agreement, gift, or grant)? Or is it a general business expense?
- **Avoid jargon and acronyms:** Would an outside observer understand the terminology and acronyms used?
- **Prudent person test:** Is this expense ordinary and necessary for the business purpose? Does this expense represent a departure from our normal, established practices? Would a prudent person be able to understand and justify the expense?



## Some examples:

**Not so good:** “This is the same trip I take every year for NCACUBO”

**Good:** “I traveled to Smalltown, NC to attend the annual conference for the NC Association of College and University Business Officers. This conference focused on data and reporting for university business officers and is part of my annual professional development plan. I drove in a state car and stayed at the hotel reserved for conference attendees. Funding is from general SOG funds for professional development.”





## Some examples:

**Not so good:** “Catering for CDA”

**Good:** “Payment to catering company for lunch served to attendees of the SOG’s Community Development Academy Session 12 on April 25, 2024. Agenda and attendee list are attached”



# What other documentation is required?

- **An itemized receipt/invoice:**
  - This documentation must show the date of purchase, the name of the merchant, a complete list of items purchased, total price and method of payment.
  - For business meals, both the credit card receipt and the itemized receipt are required.
- **Additional documentation** may be needed depending on the purchase; for example, an attendee list and agenda for programs or meetings. Please review the Business Office Microsite or reach out to a member of the business office team with any questions.



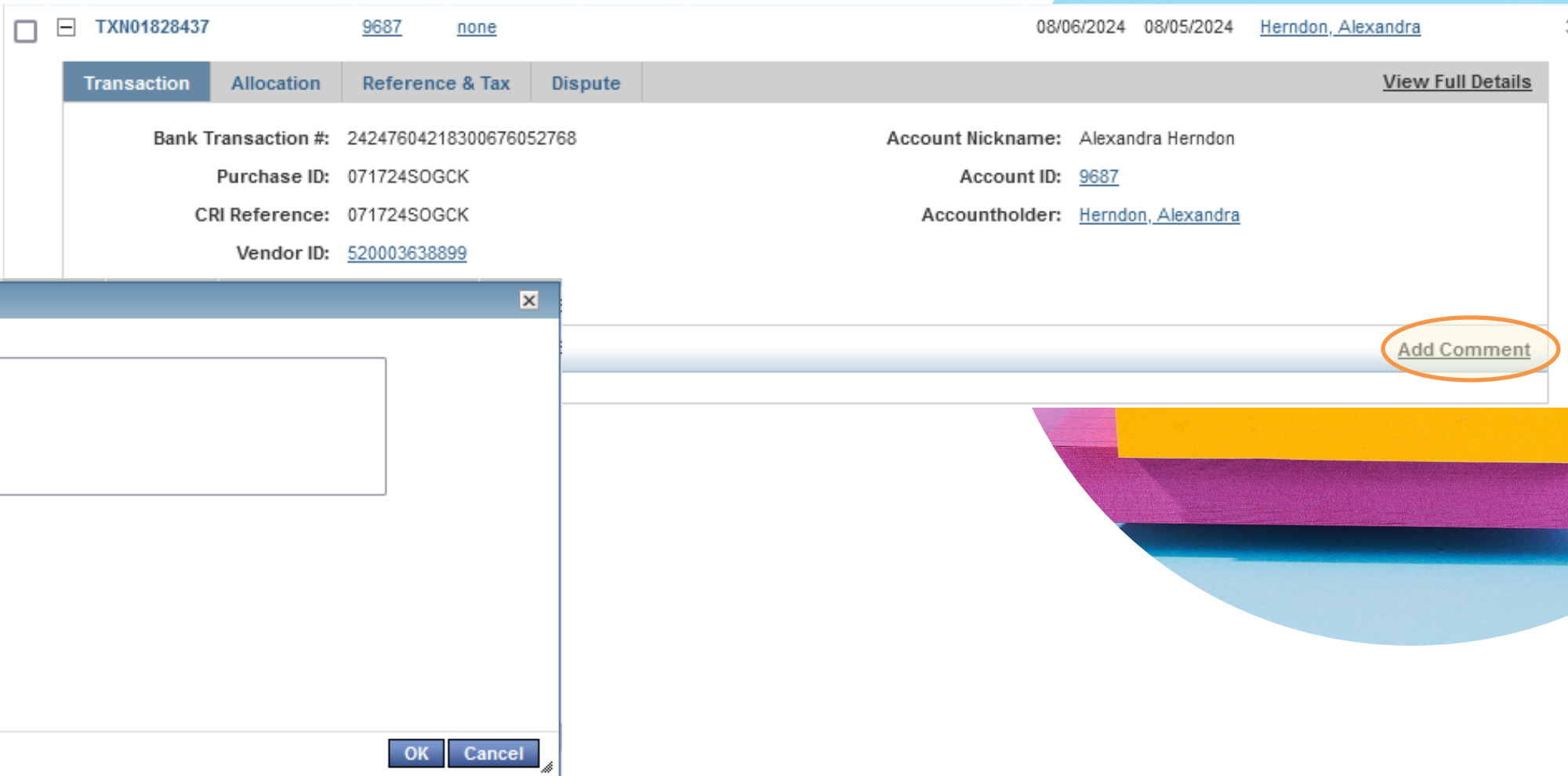
## But why?

- **University policy and State Law**
- Audit findings at other UNC Institutions
- Third party auditor for pcard and T&E card, external auditor for SOG Services and Foundation



# How and where?

## Pcard: comment on the transaction



The image shows a screenshot of a software interface for viewing transaction details. The main window displays the following information:

- Transaction ID: TXN01828437
- Account ID: 9687
- Account Name: none
- Date: 08/06/2024
- Period: 08/05/2024
- Account Holder: Herndon, Alexandra

The transaction details are organized into tabs: Transaction, Allocation, Reference & Tax, and Dispute. A [View Full Details](#) link is also present.

Transaction details include:

- Bank Transaction #: 24247604218300676052768
- Purchase ID: 071724SOGCK
- CRI Reference: 071724SOGCK
- Vendor ID: [520003638899](#)
- Account Nickname: Alexandra Herndon
- Account ID: [9687](#)
- Accountholder: [Herndon, Alexandra](#)

An [Add Comment](#) button is circled in orange. A dialog box is overlaid on the bottom left, containing a large text input field and [OK](#) and [Cancel](#) buttons.

# How and where?

## Ramp: Memo Box

Submission policy

### General Expenses

 3 Missing Policy Requirements

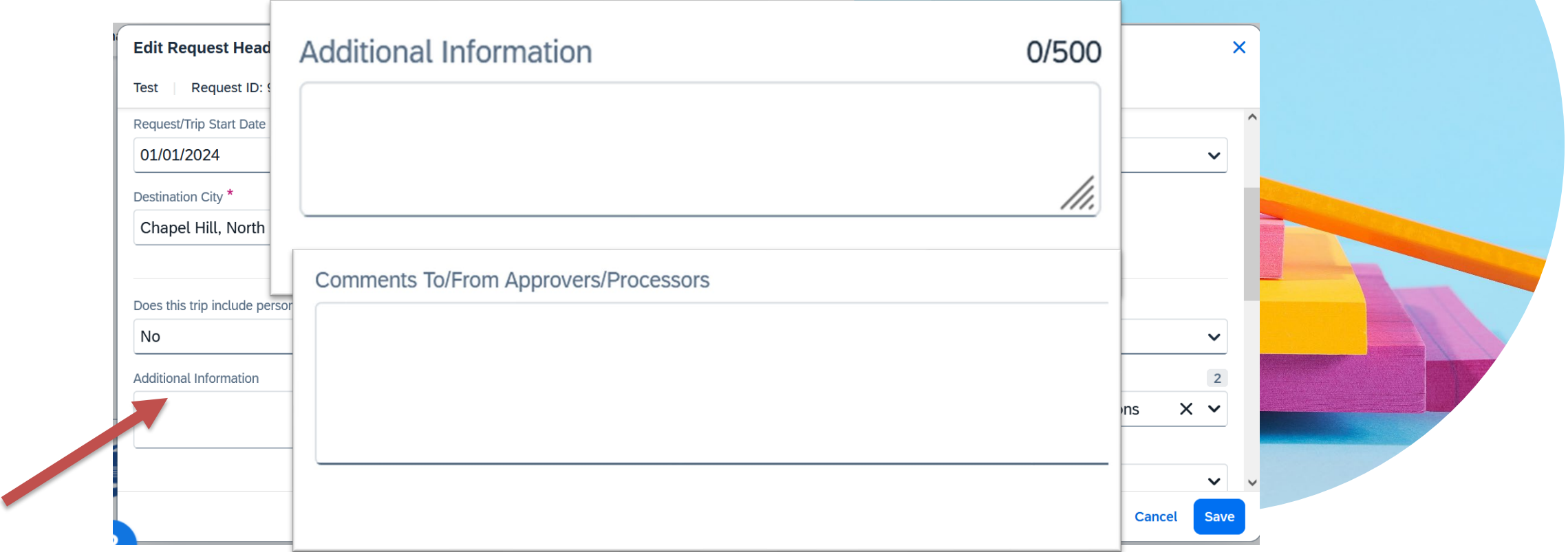
- Memo
- Receipt
- QuickBooks Customer/Job

Dismiss requirements



# How and where?

**Concur:** added to either the Additional Information or Comment boxes



# How and where?

**Supply requests:** new question on submission form

**Invoices:** Include with ticket



# Independent Contractor Reminders



# Contractor Types

- Independent Contractor = Business Office
- Vendors = Business Office
- Former/current UNC employees (including adjuncts) = HR
- State employees = HR
- Students = HR



# 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



# Independent Contractors

- Payment cannot be issued without an invoice
  - Include documentation for travel reimbursements
- New agreements are needed for each project/engagement



# Travel

# 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](#).
- Collect receipts and W-9 from the individual and complete the non-employee travel reimbursement form
- Submit to the business office ticketing system along with source of funding

## 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: \$

# 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/)



**NC SCHOOL OF GOVERNMENT**

Public Officials | Topics | Courses | Publications | Blogs | Resources | Giving | Knapp Library | MPA Degree

Microsites | Office of Business and Finance | Office of Business and Finance

**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

**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

What's next?

# Save the Date

- **Next Business Office Update Session:**  
Monday October 28<sup>th</sup> at 2pm
- **Monthly Check-In with OSP:** First Monday  
of each month at 1:30pm
- **Travel/Concur Help Sessions:** Wednesdays  
from 3-4pm



# Questions