NEW RSPH EMPLOYEE FINANCIAL OVERVIEW

Welcome to the Rollins School of Public Health and Emory University!

Please meet with your department’s Office Manager to review your Department’s specific financial processes, and to review any general questions concerning purchasing and procurements.

Once you have determined your financial access needs, please use this overview as a reference to learn about Emory University websites for training information, policies and procedures, helpful hints, etc.

The RSPH Reimbursements and Payables office (RAP) is here to assist you with your procurement, reimbursement, and payables needs. Our offices are located in room 815 and 825 of the Grace Crum Rollins Building. We can be contacted at:

<table>
<thead>
<tr>
<th>Name</th>
<th>Contact</th>
<th>Primary department support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allyson Frye</td>
<td>404-727-3392</td>
<td>Those not noted below</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:aafrye@emory.edu">aafrye@emory.edu</a></td>
<td></td>
</tr>
<tr>
<td>Linda Longwell</td>
<td>404-727-9761</td>
<td>BSHE</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:lpmorga@emory.edu">lpmorga@emory.edu</a></td>
<td>Dean’s Offices and Administration HPM</td>
</tr>
<tr>
<td>Leola P. Morgan</td>
<td>404-712-1324</td>
<td>Global Health</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:trill@emory.edu">trill@emory.edu</a></td>
<td></td>
</tr>
<tr>
<td>Christine Baker</td>
<td>404-727-5149</td>
<td>Business Services issues</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:cbaker9@emory.edu">cbaker9@emory.edu</a></td>
<td>Journals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Verizon cell phone billings</td>
</tr>
<tr>
<td>Rhonda Burke</td>
<td>404-712-4250</td>
<td>Business Mgr</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:rburke@emory.edu">rburke@emory.edu</a></td>
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</tr>
</tbody>
</table>

Please let us know if you need any special assistance. Again, welcome to RSPH!

RSPH Administration and Finance website
http://www.sph.emory.edu/cms/about/admin_and_finance/index.html
Emory University's financial website
https://www.finance.emory.edu/home

To register for training:

TRAINING tab

Choose this tab to register for any of the classes listed above.
## FINANCIAL CLASSES

<table>
<thead>
<tr>
<th>CLASS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting Basics</td>
<td>Covers Compass fundamentals, setting up preferences, and journal entries.</td>
</tr>
<tr>
<td>Emory Business Intelligence (EBI)</td>
<td>Provides step-by-step assistance for NEW EBI USERS. Participants will gain practical knowledge on how to run and retrieve year-end Emory Business Intelligence (EBI) reports.</td>
</tr>
<tr>
<td>Inquiry and Query Basics</td>
<td>Covers using inquiries and queries. <strong>Prerequisite:</strong> Accounting Basics.</td>
</tr>
<tr>
<td>Expense Reporting</td>
<td>Covers entering and submitting an expense report in Compass, setting up a proxy, entering an expense report as a proxy, adding multiple expense lines, copying expense report lines, splitting a receipt, modifying a denied expense report, and the approval process.</td>
</tr>
<tr>
<td>Emory Express</td>
<td>Covers using the online procurement system to purchase goods and services on behalf of Emory University.</td>
</tr>
</tbody>
</table>

### COMPASS

<table>
<thead>
<tr>
<th>WHAT IS IT</th>
<th>Emory’s financial reporting system.</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHO NEEDS IT</td>
<td>Any employee who has responsibility for any financial action (including placing orders, requesting payment and reimbursement, etc.)</td>
</tr>
<tr>
<td>WEBSITE</td>
<td><a href="#">COMPASS login</a></td>
</tr>
</tbody>
</table>

### Emory Express

<table>
<thead>
<tr>
<th>WHAT IS IT</th>
<th>Emory’s purchasing system.</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHO NEEDS IT</td>
<td>Any employee who has responsibility to enter requisitions/orders for goods and services.</td>
</tr>
<tr>
<td>WEBSITE</td>
<td><a href="#">Emory Express login</a></td>
</tr>
</tbody>
</table>

### EBI

<table>
<thead>
<tr>
<th>WHAT IS IT</th>
<th>Emory Business Intelligence (EBI). Financial reporting and data analysis tool.</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHO NEEDS IT</td>
<td>Any employee who wants to review or has responsibility to review the financial standards of projects/smartkeys.</td>
</tr>
<tr>
<td>WEBSITE</td>
<td><a href="#">EBI Finance webpage</a></td>
</tr>
</tbody>
</table>

### Corporate Card

<table>
<thead>
<tr>
<th>WHAT IS IT</th>
<th>Emory’s purchasing and travel credit card.</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHO NEEDS IT</td>
<td>Any faculty or staff member who travels, regardless of the number of trips taken per year. Any faculty or staff member who purchases goods and services, outside of Emory Express (as appropriate).</td>
</tr>
<tr>
<td>WEBSITE</td>
<td><a href="#">Corporate Card website</a></td>
</tr>
<tr>
<td>CARD APPROVER</td>
<td>Rhonda Burke, <a href="mailto:rburke@emory.edu">rburke@emory.edu</a></td>
</tr>
</tbody>
</table>
**OTHER HELPFUL FINANCE WEBSITES**

**Compass Online Reference guide**

The *Compass Online Reference Guide* consolidates information for the various Compass modules into one handy reference tool. It provides detailed, step-by-step instructions on how to perform various functions in Compass.

**COMPASS Online Reference Guide**

**PROCUREMENT AND PAYABLES**

Information on how to pay companies, individuals, and when to use your Corporate and P-Card

Commodity Matrix

Emory University Suppliers

Procurement & Payment Forms
https://www.finance.emory.edu/home/Procure%20and%20Pay/index_procure_pay Procureandpayforms.html
Procure Pay Policies
http://policies.emory.edu/

Quick list/Frequently accessed:
2.95 Air and Rail Travel
2.110 Approval Requirements for Reimbursements & Payments
2.106 Business Meals
2.109 Business Purpose
2.111 Business Expense Receipts
2.5 Gifts and Celebrations
2.104 Non-Reimbursable or Payable Items
2.107 Non-Reimbursable and Unallowable Charges
2.100 Personal Meals
2.99 Personal Vehicles
2.105 Sponsored Programs Travel
2.5 Sympathy or memorial gifts
2.94 Travel Receipts
Travel Information on the University travel policy, booking travel, transportation, insurance, etc. 
https://www.finance.emory.edu/home/travel/index.html

Air Travel Requirements 

Booking Air Travel

Emory's three air travel providers offer you and your department many benefits:

1. Automatically feeds your trip itinerary into International SOS for traveler tracking
2. Offers choice of charging your airfare to your Corporate Card, personal card or direct bills your airfare to your department. (Direct Bill only available until 9/1/13)
3. Tracks your unused airline ticket credits for you to apply to your next trip
4. 2% - 25% discount (depending on fare purchased) on Delta Air Lines
5. 2% discount (on all fares) on Continental/United Airlines
6. Centralizes travel data allowing Emory to negotiate even better airline discounts

Please note, if you are wanting to directly charge your airfare to an Emory Healthcare SmartKey (rather than Emory University SmartKey), then BCD Travel is your only option for direct billing to a Healthcare SmartKey.

If you are wanting to book travel for Emory guests, please be aware of the financial risk in doing so. If the guest cancels and a non-refundable ticket was purchased, Emory will not receive any refund or credits for the cancellation.

Is your trip a simple, single destination booking where no agent assistance is needed? (Click on logo below for more details and to book online)

Is your trip a complex, multi-stop and/or multi-airline booking where agent assistance is needed? (Click on either logo below for more details)
RSPH SIGNATURE POLICIES

Required Signatures and Approval Policy: Non-sponsored Funds
October 26, 2011

This policy applies to all RSPH employees responsible for the expenditure of non-sponsored funds. It applies to all reimbursement requests (P-Cards, Corporate Cards, Accounts Payable, Emory Express, etc). This policy is in addition to any applicable university fiscal policies.

BACKGROUND
The concept behind having approvals is to insure that at least two individuals are involved in the expenditure of University funds. The individual who initiates a purchase should not be the one to approve it. The approver must be a supervisor or someone with independent judgment. (See University Policy 2.110 -Approval Requirements for Reimbursements and Payments.) This is standard operating procedure and one of the hallmarks of a good internal control system.

POLICY
Expenditures and requests for reimbursements initiated by a staff member or for a staff member always require a supervisor review and approval. This review is to assure that the transaction is necessary and appropriate. The Reimbursement and Payables (R & P) group in the RSPH Dean’s Office will review for 1) compliance with Emory University Policy 2) documented business purpose, and 3) the use of appropriate form and payment method.

Expenditures and requests for reimbursement initiated by a faculty member or for a faculty member will be reviewed by the R & P group. Again the review is for 1) compliance with Emory University Policy 2) documented business purpose, and 3) the use of appropriate form and payment method. If the expenditure or reimbursement request appears to be out of the ordinary, the R & R group will request a review from the faculty member’s department chair. Most transactions will not require a department chair’s approval.

_______________________________________________________

Required Signatures and Approval Policy: Sponsored Funds
October 26, 2011

This policy applies to all RSPH employees responsible for the expenditure of sponsored funds. It covers all reimbursement requests (P-Cards, Corporate Cards, Accounts Payable, Emory Express, etc). This policy is in addition to any applicable University fiscal policies.

BACKGROUND
The concept behind having approvals is to insure that at least two individuals are involved in the expenditure of University funds. Typically, the individual who initiates a purchase cannot be the one to approve it. In addition, the approver must be the supervisor or someone with a higher level of authority than the person initiating the transaction. (See University Policy 2.110 - Approval Requirements for Reimbursements and Payments.) This is standard operating procedure and one of the hallmarks of a good internal control system.

SPONSORED PROJECTS
Individuals with higher level authority (the Department Head or Dean) cannot typically make judgments concerning the need or appropriateness of expenditures for a sponsored project. Therefore, the approval of expenditures on sponsored funds is an exception to standard operating procedures in the following ways:

- For allowability, a RSPH Research Administrator reviews that all expenses were within normal policy, unless otherwise designated by project-specific need.
- For applicability, a RSPH Research Administrator reviews that all the sponsored funds were spent in accordance with the grant or contract.

POLICY
Expenditures initiated by the PI and charged against the PI’s sponsored project DOES NOT require an immediate one-level-up approval. Such expenditures will be reviewed as noted in the section above for allowability and applicability to grant or contract terms.

Expenditures initiated by a member of a PI’s staff, and charged against the PI’s sponsored project require one-level-up approval. This must be the PI or an individual designated by the PI to have budgetary authority over the account.

The Reimbursement and Payables (R & P) group in the RSPH Dean’s Office will review for (1) compliance with Emory University Policy, (2) documented business purpose, and (3) the use of appropriate form and payment method.
RSPH HELPFUL INFORMATION

RSPH website
http://www.sph.emory.edu/cms/index.html

RSPH Administration and Finance website
http://www.sph.emory.edu/cms/about/admin_and_finance/index.html

RSPH Financial Forms
http://www.sph.emory.edu/cms/about/admin_and_finance/forms.html

RSPH Office Supplies Request
https://intranet.sph.emory.edu/office_supply/index.php

RSPH Human Resources & Payroll
http://www.sph.emory.edu/cms/about/admin_and_finance/hr_payroll.html
PARTICIPANT STIPENDS

Emory has two options for participant stipends: Research Participant Payment Fund (RPPF) or the purchase of gift cards (including electronic gift cards).

FIRST STEP

1. Obtain IRB approval for participant involvement.
   You will need to keep a copy of your IRB approval with your gift card documentation.

2. If sponsored funds will be used:
   Speak with your financial analyst to ensure that participant payments are approved within your sponsored project. Your financial analyst will also inform you of any special agency requirements. **Note:** All CAS requests must be approved before PSF, gift cards, payments, etc. can be obtained.

RESEARCH PARTICIPANT PAYMENT FUND

RPPFS are established through the Office of the Controller. To establish a fund:

1. Navigate to the Emory forms Finance Web page:
   [https://www.finance.emory.edu/home/accounting_svc accounting_services_forms/index.html](https://www.finance.emory.edu/home/accounting_svc accounting_services_forms/index.html)

2. Complete the RPPF New or Increase Request form.
   Obtain signatures of Custodians, Principle Investigator, and Department Chairperson. 
   Bring form and required documentation to RAP (825 GRC) for review and Operating Unit/Business Unit approvals.

3. Email the completed form, with appropriate signatures, and required documentation to the Controller’s Office at RPPF@emory.edu.

4. The Controller’s Office will notify you of approval by email. Your first/initial will request of funds must be submitted as a voucher request within COMPASS.
**GIFT CARDS**

Emory/RSPH has 3 methods for the purchase of gift cards:

### Option 1: Emory Express

<table>
<thead>
<tr>
<th>Denomination</th>
<th>$5 - $500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use</td>
<td>Gift cards and ecards Employee, student, and non-employee gifts Participant stipend gift cards</td>
</tr>
<tr>
<td>Procedure</td>
<td>Order thru Emory Express. Gift reporting confirmation required for employee gift cards. IRB number required for study participant cards.</td>
</tr>
</tbody>
</table>

### Option 2: RAP

<table>
<thead>
<tr>
<th>Denomination</th>
<th>$25, $50 and $100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use</td>
<td>Employee, student, and non-employee gifts Urgent need for study participant gift cards</td>
</tr>
<tr>
<td>Procedure</td>
<td>RAP Gift Card Request form RAP Receipt Confirmation form</td>
</tr>
</tbody>
</table>

### Option 3: Emory Corporate Card

| Use | Limited use. Should only use if option 1 or 2 is not available/appropriate. Should only be used for last minute/Urgent requests. |

### OPTION 1: EMORY EXPRESS

**This is the preferred method for obtaining gift cards.** Gift Cards from several vendors are available and can be ordered thru Emory Express ([https://www.finance.emory.edu/home/index.html](https://www.finance.emory.edu/home/index.html)).

**Funding:**

**P-COTHS (non-sponsored) Funds** must be used when ordering **Visa Gift Cards** (this is because of the service fee for obtaining the Visa cards). Once the expense posts against the account, a journal can be submitted to move the value of the card (minus the fee) from the p-coth to the appropriate sponsored account.

**National Gift Card** is the vendor and the punch-out is located under the “Specialty” section. Some of the gift cards that are available are: CVS, ITunes, Kmart, Publix, Starbucks, Subway, Target, Walgreens, and Walmart.

**VISA** gift cards expire in 12 months. Service fee is $2.50 ($3.00 for cards $300 and above).
OPTION 2: RAP

Please email Rhonda Burke at rburke@emory.edu to request cards.