

**RSPH
PAYMENT &
PURCHASING
BASICS**

Fall 2010



Procurement and Payment Services

- Procurement and Payment Services of the Emory University Finance Division manages:
- Payments to individuals (non-employees)
- Payments to companies
- Payments to study participants (with the Cash Management staff of the Controller's Office)
- Purchases via Emory Express or corporate cards
- Vendor maintenance, supplier diversity, preferred vendors, and contract administration

www.finance.emory.edu

► SCHOOLS ► LIBRARIES ► RESOURCES ► SEARCH

EMORY UNIVERSITY | Finance Division

PAYROLL **PROCURE & PAY** TRAVEL GRANTS ACCOUNTING REPORTING CASH & DEBT FINANCE TRAINING

Finance Shortcuts

- Compass Financials
- Compass Reporting
- FY09 and Prior Data
- Mail Services/Postage
- Account Review
- Labor Distribution Reports
- WebOptix
- Student Financial Services
- EmoryCard
- Nonresident Alien Tax

Finance News and Events

- *Journal and General Ledger Deadlines for 2010*
- *Access to Compass support is now easier and faster!*
- *Important Payroll Dates*
- *Emory's New Finance Website*
- *Access to the old Finance website*
- *New Journal Entry Approval Policy*
- *Important Tip: Update Your Procedures!*

Finance Calendar

Today ◀ ▶ Friday, April 9 Print We

Friday, April 9
Biweekly Pay Date
Thursday, April 15
Biweekly Payroll Paperwork Due to HR
Expired Entries Deletion Date
Tuesday, April 20
Biweekly Payroll Run Date

sustainability
TAKE THE PLEDGE ►

Emory Report
ing a greener Atlanta

Procurement and Payment Services

PAYROLL	PROCURE & PAY	TRAVEL	GRANTS	ACCOUNTING	REPORTING	CASH & DEBT	FINANCE TRAINING
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Procure & Pay

- [Buying in the Marketplace \(Home of Emory Express\)](#)
- [How to Pay - Payment Services](#)
- [Credit Cards at Emory](#)
- [Contract Administration](#)
- [Training for our Campus](#)
- [Supplier Diversity](#)
- [Policies](#)
- [Procure & Pay FAQ's](#)
- [Archived Articles and Memos](#)
- [Glossary of Terms](#)
- [About Us](#)
- [For Suppliers](#)
- [Forms \(for ACH, Sales Tax Exempt, Credit Cards, Wire Transfers, W-9, and more\)](#)

Welcome to Procure & Pay

Our web pages are designed to make it easy for you to find the buying and paying information you need. We've made the pages simple, clean and easy to navigate. Also, check the **QUICK LINKS** on the upper right side of all PROCURE & PAY web pages for quick access to our most popular pages.

Procurement Services — "Where and How to Buy" Goods and Services at Emory



Our staff of professional buyers in Procurement Services manages the buying of goods and services for the University. We secure the best price, quality and service and provide innovative approaches to streamlining the process especially for frequent, university-wide purchases. Check our complete contract listing in Emory Express for savings opportunities. Also, look at our web page [Buying Green for environmentally-friendly initiatives](#). Above all, consult with our professional procurement staff for your special needs and high-dollar purchases.

The [Buying in the Marketplace](#) web page guides you "Where and How to Buy" your goods and services at Emory and provides a Commodity Index listing for your convenience.

Payment Services — "How to Pay" Suppliers for goods/services as "How to Pay" individuals



Our Payment Services staff is responsible for the payment of goods and services to suppliers as well as facilitating reimbursements to individuals for costs incurred as part of the University business. With an emphasis on maintaining controls, we provide innovative approaches to streamlining the payment process especially for frequent, university-wide purchases. For invoice resolution, reimbursement advice, Compass Expense Reports and other payment-related questions, contact our Procure & Pay Customer Care Team at 404.727.5400.

For detailed information on how to process your payment transactions, refer to the [How to Pay- Payment Services](#) page as it provides you information on how to process all your payment transactions.

Procure & Pay Quick Links

- Our **Customer Care Team** can answer all your questions, about Payments, Emory Express, and more...
404.727.5400
e-market@emory.edu
- [Emory Express](#)
- [Supplier Announcements and Promotions](#)
- [Take Our Poll - Preferred Scientific Supplier](#)
- [View Survey Results](#)
- [Compass Expense Reports and Payment Requests](#)



[EMPLOYEE DISCOUNTS ▶](#)

Payment and Procurement Staff

▶ SCHOOLS ▶ LIBRARIES ▶ RESOURCES ▶ SEARCH



EMORY
UNIVERSITY

Finance Division

PAYROLL
PROCURE & PAY
TRAVEL
GRANTS
ACCOUNTING
REPORTING
CASH & DEBT
FINANCE TRAINING

Procure & Pay

Buying in the Marketplace
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Procurement & Payment Services Contacts

<p>Customer Care Team answers your questions on Emory Express, Payments to Suppliers, Individual Payments and Reimbursements.</p>	<p>Customer Service is in charge of Emory Express training, demo's and instruction manuals.</p>
<p>Customer Service Representatives:</p> <p>Tiffany Campbell, Damian Alston and Camelia Petty</p> <p>Ph: 404.727.5400</p> <p>Fax: 404.727.4358</p> <p>e-market@emory.edu</p>	<p>Customer Service Supervisor:</p> <p>Amy DeMore</p> <p>Ph: 404.727.4324</p> <p>Fax: 404.727.4358</p> <p>amy.demore@emory.edu</p>
<p>Communications and Marketing</p>	
<p>Jennifer Hulsey</p> <p>Director, Emory Marketplace Communications and Marketing and Manager of Emory Travel Services</p> <p>Ph: 404.727.8096</p> <p>Fax: 404-727.4358</p> <p>jennifer.hulsey@emory.edu</p>	<p>Mary Ellen McClellan</p> <p>Senior Manager of Emory Marketplace Communications and Marketing</p> <p>Ph: 404.727.0253</p> <p>Fax: 404.727.4358</p> <p>mary.ellen.mcclellan@emory.edu</p>
<p>Commodity Managers and Buyers</p>	
<p>Finesha Lee</p> <p>Commodity Manager - Scientific</p> <p>Ph: 404.727.4302</p> <p>Fax: 404.727.2153</p> <p>flee2@emory.edu</p> <p>Ron Gorrell</p> <p>Scientific Buyer III</p> <p>Ph: 404.727.2254</p>	<p>Antibodies, Biological's & Perishables</p> <p>Controlled Substances</p> <p>Custom Items</p> <p>Drugs & Pharmaceuticals</p> <p>Equipment Maintenance and Repair</p> <p>Laboratory Casework</p> <p>Lab Apparel</p> <p>Microscopes, Equipment & Repair</p>

Procure & Pay Quick Links

Our Customer Care Team can answer all your questions, about Payments, Emory Express, and more...
404.727.5400
e-market@emory.edu

Emory Express

Supplier Announcements and Promotions

Take Our Poll - Preferred Scientific Supplier

View Survey Results

Compass Expense Reports and Payment Requests



Sparkfly™
Parks to the People

EMPLOYEE DISCOUNTS ▶

Contact Information

- Primary Contact Information
 - (404) 727-5400 is the helpline
 - Or e-mail: e-market@emory.edu
- Please do not e-mail or call specific staff members of Emory University Accounts Payable unless you are directed to do so by the helpline staff @ (404)727-5400
- RSPH Business Services staff are also happy to assist

RSPH Business Services

- Contact RSPH Business Services if you would like one-on-one assistance:
- We are located on the 8th floor of the Grace Crum Rollins Bldg
 - Leola Morgan 712-1324; lpmorga@emory.edu
 - Allyson Frye 727-3392; aafrye@emory.edu
 - Linda Longwell 727-9761; trlll@emory.edu
 - Carolynn Miller 712-8379; cmmille@emory.edu

Emory Policy

- Employees authorized to request purchases or request payments must abide by RSPH policies and procedures and Emory University policies and procedures
- Failure to do so may result in disciplinary action, up to and including termination of employment.
- Emory may also collect any amounts for improper purchases or payments and may also pursue legal action if necessary

Business Purpose of Purchases and Payments

- All transactions resulting in purchases or payments to individuals or organizations require a detailed **BUSINESS PURPOSE** – this is a standard business practice that allows RSPH to meet audit standards.
- A business purpose contains more than a description of the services or the items being requested for purchase or reimbursement, *it includes the business purpose and explanation for the expense. For instance, “supplies” is not a business purpose, it is a statement of what was purchased, but not why (for what purpose). Include the date(s) as well.*

How to Pay

- P-Card – use for incidentals, groceries, business meals, boxed lunches, catering , registrations, licenses, van rentals, subscriptions, and monthly services: coffee or water service, storage, and business phones (limit=\$1,499.00)
- Emory Express - all other purchases
- Individuals (non-employees) – Compass Accounts Payable
- Companies – pay via Emory Express
- Wire Payments – USD in Emory Express
- International Currency Wire Payments through form on Procure and Pay Forms Page:
- [https://www.finance.emory.edu/home/Procure%20and%20Pay/how to pay in the marketplace/NewWire%202010.pdf](https://www.finance.emory.edu/home/Procure%20and%20Pay/how%20to%20pay%20in%20the%20marketplace/NewWire%202010.pdf)

How to Pay

- Travel
 - T-Card – process payment to vendors via Compass Travel and Expense module
 - Personal Card – request reimbursement via Compass Travel and Expense module
 - Airfare – direct bill via one of the 3 required travel agencies:
 - https://www.finance.emory.edu/home/travel/air_travel/index.html

How to Pay

- If you are unsure of the correct payment method, please call the helpline at (404) 727-5400 or ask RSPH Business Services staff **BEFORE** making the purchase
- Some items are not reimbursable and should not be purchased with sponsored program or university funds:

Emory Express

- Emory Express software facilitates multiple functions:
 - Buying in the Marketplace
 - All purchases not appropriate or possible on the P-Card (except travel expenses to be placed on T-Card)
 - All purchases of restricted items
 - Payments to Companies
 - Subcontract Payments
 - Wire Payments in US Currency

Emory Express

- All Emory Express purchases or payments charged to budget smartkeys managed by the School of Public Health will require these approvals before payments will be issued or orders will be processed:
 - PI and Research Financial Analyst approvals for sponsored program expenses, then RSPH Business Services approvals
 - Dept Chair then RSPH Business Services approvals for all department purchases

Emory Express Access/Training

The screenshot displays the Emory University Finance Division website. At the top, the Emory University logo and 'EMORY UNIVERSITY' are on the left, and 'Finance Division' is on the right. A navigation bar includes links for SCHOOLS, LIBRARIES, RESOURCES, and SEARCH. Below this is a horizontal menu with categories: PAYROLL, **PROCURE & PAY** (circled in orange), TRAVEL, GRANTS, ACCOUNTING, REPORTING, CASH & DEBT, and FINANCE TRAINING. The main content area is divided into three columns. The left column is a yellow sidebar with links: Procure & Pay, Buying in the Marketplace (Home of Emory Express), How to Pay - Payment Services, Credit Cards at Emory, Contract Administration, and **Training for our Campus** (circled in orange), which includes Emory Express, P-Card and Corporate Card, and Standing Orders. The middle column features a 'Training Opportunities' section with a paragraph about educational opportunities, an 'EMORY EXPRESS' logo, and a 'Training session for Emory Express' section listing four topics: ordering goods and services, on-line receipt, ordering forms, and invoice processing. The right column has a 'Procure & Pay Quick Links' section with links for Customer Care Team, Emory Express, Supplier Announcements and Promotions, Take Our Poll, View Survey Results, and Compass Expense Reports and Payment Requests.

EMORY UNIVERSITY | Finance Division

► SCHOOLS ► LIBRARIES ► RESOURCES ► SEARCH

PAYROLL **PROCURE & PAY** TRAVEL GRANTS ACCOUNTING REPORTING CASH & DEBT FINANCE TRAINING

Procure & Pay

Buying in the Marketplace (Home of Emory Express)

How to Pay - Payment Services

Credit Cards at Emory

Contract Administration

Training for our Campus

Emory Express

P-Card and Corporate Card

Standing Orders

Training Opportunities

We offer a variety of educational opportunities to help you develop your procurement knowledge and skills. Select your needs from the following options to help you in your every day work.

EMORY EXPRESS

Training session for Emory Express

In the Emory Express session you will learn:

- How to order goods and services
- Receive goods and services on-line
- Use the different types of ordering Forms, and
- Process the Invoice Attached Form

Procure & Pay Quick Links

Our **Customer Care Team** can answer all your questions, about Payments, Emory Express, and more...
404.727.5400
e-market@emory.edu

Emory Express

Supplier Announcements and Promotions

Take Our Poll - Preferred Scientific Supplier

View Survey Results

Compass Expense Reports and Payment Requests

Emory Express Access/Training

PAYROLL	TRAVEL	GRANTS	ACCOUNTING	REPORTING	CASH & DEBT	FINANCE TRAINING
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Procure & Pay

Buying in the Marketplace (Home of Emory Express)

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Policies

Procure & Pay FAQ's

Archived Articles and Memos

Glossary of Terms


About Us

For Suppliers

Forms (for ACH, Sales Tax Exempt, Credit Cards, Wire Transfers, W-9, and more)

Training - Demo's and Manuals

Registration for Emory Express Training



Are you the one that will be entering the requisitions/orders for goods and services? If so, you will need the complete two-hour hands-on training session for Emory Express. To register, follow these directions for your training and access to Emory Express:

1. Print this form, **Registration Form for Online Access**, get approval for your access to Emory Express.
2. Complete the form and have your Department Administrator approve (sign) for your access to Emory Express.
3. Register (sign-up) for one of the Emory Express training sessions. [Click here to register](#)
4. [Bring your completed Registration Form for Online Access](#) to the class.

(Note: This form is required with the Department Administrator's signature when you go to the training session.)

Emory Express Approver - Are you an Approver of Requisitions and need access to approve requisitions?

If you are the one who approves Emory Express Requisitions, please contact e-market@emory.edu for Approver-only training. When approver training sessions are needed, special sessions are scheduled.

Advanced Emory Express Training - Would your department like to have an advanced training session?

If your department is interested in an advanced Emory Express training session, contact [Amy DeMore](#), Instructor, to schedule a session and discuss your department's specific training needs. A minimum of 12 *current* Emory Express users are required to be present.

Emory Express Demo's - Listen to these easy instructions for:

Procure & Pay Quick Links

Our **Customer Care Team** can answer all your questions, about Payments, Emory Express, and more...
404.727.5400
e-market@emory.edu

Emory Express

Supplier Announcements and Promotions

Take Our Poll - Preferred Scientific Supplier

View Survey Results

Compass Expense Reports and Payment Requests

Emory Express Login

EMORY UNIVERSITY | Finance Division

SCHOOLS | LIBRARIES | RESOURCES | SEARCH

PAYROLL | PROCURE & PAY | TRAVEL | GRANTS | ACCOUNTING | REPORTING | CASH & DEBT | FINANCE TRAINING

Finance Shortcuts

- 1100 and 1100-0000
- Mail Services/Postage
- Account Review
- Labor Distribution Reports
- WebOptix
- Student Financial Services
- EmoryCard
- Nonresident Alien Tax
- Time and Attendance
- Buy in Emory's Marketplace
- Emory Express**



Finance News and Events

- *Journal and General Ledger Deadlines for 2010*
- *Access to Compass support is now easier and faster!*
- *Important Payroll Dates*
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- *Important Tip: Update Your Procedures!*

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Today | Friday, April 9 | Print | We

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Events shown in time zone: Eastern Time | Google Calendar



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CAMPUS NEWS ▶

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Payments to Companies via Emory Express

- To pay a company (not an individual), use Emory Express software
 - Use the Invoice Attached Form in Emory Express to process the payment
 - You will need the Supplier Invoice Number and the Invoice to attach – get PI or Dept Chair signature on invoice, depending on smartkey charged
- May also use Emory Express for: catering needs; subscriptions or memberships when AMEX is not accepted; Homeland Security Fee Payments
- To apply for access and training:
https://www.finance.emory.edu/home/Procure%20and%20Pay/procure_and_pay_training%20/index_procure_pay_emoryexpress.html

Emory Express Invoice Attached Form

The screenshot shows the Emory Express website interface in a Windows Internet Explorer browser. The address bar displays the URL: `https://solutions.sciquest.com/apps/Router/Home?tmstmp=1270844139292&tmstmp=1270844139294`. The page header includes the Emory Express logo, a user profile for 'Carolynn Miller', and a search bar with 'PR No.' as the search criteria. A navigation menu contains links for 'home/shop', 'favorites', 'forms', 'carts', 'approvals', 'history', 'settlement', and 'more >>'. The 'settlement' link is currently selected. Below the navigation, there is a search bar with 'Shop' and 'Everything' as the category, and a 'Go' button. A secondary navigation bar includes links for 'Go to: favorites | forms | non-catalog item | quick order' and 'Browse: suppliers | categories | contracts'. The main content area features a 'Showcased Services' section with a yellow circle highlighting the 'Invoice Attached Form' link. Other services listed include 'Verizon Cellular', 'Wire PMT Request Form - U.S. \$'s only', 'Emory University Marketing', and 'Copier Request Form'. Below this is a 'Punch-out Lab Supplies' section with logos for Fisher Scientific, Applied Biosystems, Beckman Coulter, Eurofins, Invitrogen, and Qiagen. A 'Message Board and News' section contains system notices regarding reminder emails and a policy link. The footer of the browser window shows a JavaScript command: `javascript:openFormFavorite(720561,720561,false,true);` and the system tray displays the Internet icon and a 100% zoom level.

Invoice Attached Form

Invoice Attached Available Actions (Click [here](#) for details): Add and go to Cart

Supplier Information ?

Enter Supplier

or
supplier search

If this payment is to a supplier not currently found in the system (i.e. you are using the New Supplier selection) you MUST attach a completed W9 form, a completed ACH form as well as provide an email address or fax number for the supplier in 'Internal Notes.'
Requisitions without these components will be rejected.
The ACH and W9 forms can be found at Procure & Pay Forms.

Please note that you may still select a supplier regardless of the address listed under the supplier in the supplier search.

Emory Payment Services will maintain all "remit-to" addresses as invoices are processed.

Purchase Information ?

This form is for payments in which an Emory PO was not originally issued.

Directions:

- All fields are required and should be filled in to the best of your ability.
- If a piece of information is not known (e.g. Catalog Number): 'N/A' is appropriate.
- A copy of the supplier's invoice **MUST BE** attached at the bottom of this form.
- If there are multiple PO lines for which the same invoice applies, you may select "Add to Cart" and click "Go" in the top-right corner of this screen. This action places the form in your cart without requiring a new form completion. You may then edit the form information and take the same action as many times as needed before going to your cart and placing the PO for approval(s).
- Payment will be generated from this form and its attachments. Please **DO NOT** submit the invoice to Payment Services after you have completed this form.

Form Type Invoice Attached

Catalog No.

Product Description

255 characters remaining [expand](#) | [clear](#)

Quantity

Price

Internal Information ?

Supplier Invoice Number

Internal Notes (1000 char)

1000 characters remaining [expand](#) | [clear](#)

Internal Attachments
[add attachment...](#)

Total 0.00

Paying a New Supplier

- If you are unable to locate a desired supplier or vendor for an item or service in Emory Express, you must also attach a W-9 form, an ACH Form, and provide full contact info for the supplier/vendor including fax number and e-mail in the “Notes”
- https://www.finance.emory.edu/home/Procure%20and%20Pay/index_procure_pay_procure_andpayforms.html

Purchases via Emory Express

- For any items purchased, order via Emory Express
- Whenever possible, use the preferred vendors listed in the Buying Guide
- Order from non-contract suppliers only when a product is not available from one of Emory's contract suppliers
- Also consult the Buying Guide to determine the preferred method of payment for specific items
- It is possible to enter a requisition in Express without a supplier and receive assistance in locating the best possible price from Emory University buyers

Buying Guide

PAYROLL	PROCURE & PAY	TRAVEL	GRANTS	ACCOUNTING	REPORTING	CASH & DEBT	FINANCE TRAINING
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Procure & Pay

Buying in the Marketplace (Home of Emory Express)

- Buying Green Practices
- Environmental Practices
- Scientific Procurement Advisory Council

How to Pay - Payment Services

Credit Cards at Emory

Contract Administration

Training for our Campus

Supplier Diversity

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The Emory Marketplace - Guiding you "Where and How to Buy" your goods and services

Our *Emory Marketplace*, is the **HOME OF EMORY EXPRESS**. Emory Express, is our e-procurement automation tool where faculty and staff order most commonly required products and specific services from University contract suppliers. Emory Express streamlines the order creation process, promotes the use of strategic supplier relationships and provides cost savings opportunities. To learn more, see [Emory Express Training](#).



Shop from the "Commodity Index" below for the types of goods or services you need. Provided for each commodity are guidelines describing "Where to buy, How to buy, and the preferred method of Payment".

Audio-Visual Services	Laundering Services (Lab Coats)
Books and Periodicals	Linen Rental Services
Box Lunch Providers	Mail Services and Shipping
Catering Services	Maintenance and Repair Operations
Cellular Phones & Pagers	Office Supplies
Chartered Bus Services and Shuttle Services for special events	Printing Services at Emory, and Preferred Print Suppliers For Large Print jobs, Business Cards, Letterhead, and more...
Computers, Printers & Software Also for peripherals and info on how to configure your own quotes	Promotional Items - For your Emory logo products
Digital Copiers	Relocation of Faculty & Staff
Education & Development	Storage - Records/Documents
Emory Brochures and Publications	Storage - Other Items
Emory Photo/Video	Surplus and Recycling at Emory and Emory Department Moves

Procure & Pay Quick Links

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404.727.5400
e-market@emory.edu

Emory Express

Supplier Announcements and Promotions

Take Our Poll - Preferred Scientific Supplier

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Compass Expense Reports and Payment Requests



EMPLOYEE DISCOUNTS ▶

Purchasing Restricted Commodities

- All purchases of restricted commodities must be processed through Emory's Buying in the Marketplace (Emory Express) regardless of the amount of expenditure.
- Restricted items may not be purchased with the P-Card
- Restricted Items: capital equipment; payments to individuals; leases or long-term rentals; animals; radioactive material; weapons and ammunition; controlled substances; medical/surgical supplies used in hospital or clinical patient care areas

Purchases via Emory Express

The screenshot shows the Emory Express Home/Shop website. At the top, there is a navigation bar with the Emory Express logo, a user profile for Carolyn Miller, and a search bar. Below the navigation bar, there are tabs for home/shop, favorites, forms, carts, approvals, history, settlement, and more. The main content area features a "Shop" dropdown menu with categories like Everything, Lab Supplies, Medical/Clinical, Office/Computer, MRO/Facilities, Furniture, Services, Manufacturing, Books, Electronics, Specialty, Food/Food Equipment, and Supplies Manager. The "Office/Computer" category is currently selected, showing a grid of vendor logos including Apple, CDWG, Dell, Staples, and alphaGraphics. Other sections include "Message Board and News" with "System Notices" and "Vendor Notices".

Home/Shop

EMORY EXPRESS Home/Shop

Carolynn Miller profile | logout

Select Draft Cart or Add Item to Cart

Search for PR No. [] Go advanced search

home/shop | favorites | forms | carts | approvals | history | settlement | more >>

shop | settlement

Shop Everything [] Go advanced search

Lab Supplies
Medical/Clinical
Office/Computer
MRO/Facilities
Furniture
Services
Manufacturing
Books
Electronics
Specialty
Food/Food Equipment
Supplies Manager

EMORY EXPRESS

Message Board and News:

System Notices

Emory Express will now send reminder emails for pending approvals. These messages will occur after a set period of time and for a predetermined number of times [or until the requisition has been approved.]

As a helpful reminder that orders over \$1500 require receiving, we invite you to please click on the following [link](#) to review Emory's policy on receiving.

Vendor Notices

Integrated DNA Technologies (IDT) will be upgrading their site this weekend beginning 2:00 p.m. on 4/9. The IDT punchout site will be down during this update.

Invitrogen has updated their punchout site capabilities. Once in the site you should select "Proceed to Ordering" to get to the normal punchout site.

Please note that Agencourt BioScience is now **Beckman Coulter Genomics**. Same services and prices, now found under the Beckman Coulter Genomics punchout logo.

Reminders

Don't forget that the Express helpdesk is available to assist with receiving, PO, or other ordering questions. Just dial 7-5400 on your Emory phone.

Information on loading SmartKeys and account codes to

2% Discount On Orders > \$500

Applied Biosystems

BECKMAN COULTER GENOMICS formerly Agencourt

eurofins mwjoperon

Invitrogen

QIAGEN

SIGMA-ALDRICH

PerkinElmer

Office/Computer

Apple

CDWG

DELL

STAPLES

alphaGraphics

MRO/Facilities

MSC

Genzyme

Export Control Policy

- For assistance with Export Control Compliance:
- Office of Research Compliance
 - Ste. 510, 1784 N. Decatur Rd.
 - Atlanta, GA 30322
 - Phone: (404) 727- 2398; FAX: (404) 727-2328
- In RSPH: see Shelle Bryant (404)727-9437; FAX(404)727-98531; sbryant@emory.edu

Export Control Policy and Forms

- http://www.orc.emory.edu/export_control/index.cfm
- Export restrictions under ITAR, EAR and OFAC regulations/sanctions **often implicate research activity. For examples, a license *may* be required in order to:**
- Take a laptop computer or GPS system containing controlled software into a restricted country.
- Ship research equipment outside of the United States.
- Make a payment (including honoraria, or "anything" of value) to someone in or from one of the OFAC/embargoed countries.
- Collaborate with a foreign national from embargoed countries or release certain technology or technical information to a foreign national while outside of the United States.
- Allow foreign nationals from restricted countries to participate in certain research projects at universities in the U.S. if the research falls outside the scope of the FUNDAMENTAL RESEARCH exclusion.

Purchase of Items for Use Outside the US

- For research involving certain items or technologies, the University may be required to get the prior approval of the United States government before allowing any foreign nationals to participate in the research; collaborating with a foreign country regarding research; or sharing research information verbally or in writing with foreign nationals.

Payments Via Wire Request

The screenshot shows the Emory Express Home/Shop website. The browser title is "Home/Shop - Windows Internet Explorer". The address bar shows the URL: <https://solutions.sciquest.com/apps/Router/Home?tmstamp=1270844139292&tmstamp=1270844139294>. The page features the Emory Express logo and a user profile for "Carolynn Miller" with "profile" and "logout" links. A search bar is present with the text "Search for PR No." and a "Go" button. A navigation menu includes "home/shop", "favorites", "forms", "carts", "approvals", "history", "settlement", and "more >>". The "settlement" tab is active. Below the navigation, there is a search bar with "Shop Everything" and a "Go" button. A "Go to:" section lists "favorites", "forms", "non-catalog item", "quick order", "Browse:", "suppliers", "categories", and "contracts". The "Showcased Services" section contains several links, with "Wire PMT Request Form - U.S. \$'s only" circled in orange. Other services include "Invoice Attached Form", "Verizon Cellular", "Lab Coat Laundering Form", and "Emory University Marketing". The "Punch-out" section lists "Lab Supplies" with logos for Fisher Scientific, Applied Biosystems, Beckman Coulter Genomics, Eurofins MWG Operon, and Invitrogen. A system notice at the bottom left states: "Emory Express will now send reminder emails for pending approvals. These messages will occur after a set period of time and for a predetermined number of times [or until the requisition has been approved.]. As a helpful reminder that orders over \$1500 require receiving, we invite you to please click on the following link to review Emory's policy on receiving."

Subcontract Payments

- Sponsored Program Subcontracts are also processed and paid via Emory Express
- The subcontract agreement draft is used by the Office of Sponsored Programs (OSP) to create the purchase order
- Invoices against the purchase order must be sent to:

Emory University Accounts Payable

1599 Clifton Road, 3rd floor

Atlanta, GA 30322

Subcontract Payments

- Accounts Payable uploads the invoices against the purchase order (PO)
- Research Financial Analysts and the Principal Investigator in RSPH must both confirm:
 - contracted deliverables have been fulfilled
 - the subcontract is fully executed
 - their approval of invoice payment
- RSPH Business Services will then release payment of invoice amounts to the subcontractor

Payments for Facility Use, Space Rental or Lease Agreements

- *Please be reminded that all facility use, space rental, or lease agreements relative to any space that is not owned and managed by Emory University must be reviewed and approved according to the Emory University Signature Policy. Before entering into any facility use, space rentals, or lease agreements with an organization, you are required to submit a copy of the unsigned agreement to RSPH Business and Finance.*
- The availability of project funds to support the facility lease / rent agreement and the allowability of the expense will be confirmed. If funds are available and the expense is allowable, RSPH Business and Finance will confirm this by initialing the unsigned contract and return the unsigned form to Carolynn Miller, Sr. Business Manager in RSPH Business Services, who will then route the unsigned agreement to Jan Kimbrough at the Emory University Office of Business Management at 404-727-8391 janet.kimbrough@emory.edu.
- The Office of Business Management works in concert with the Office of the General Counsel in reviewing space lease arrangements and is the final signature authority for lease agreements. Once the agreement is approved by the Office of Business Management and the Office of the General Counsel, a signed copy of the agreement will be returned to Carolynn Miller for processing. Carolynn Miller will send the **signed** agreement to the Principal Investigator.
- A project staff member will need to process the requisition via Emory Express to enable payment. The approved and **signed** copy of the space rental agreement or lease should be attached to the requisition to allow RSPH Business and Finance to maintain a master list of such agreements.

Payments to Individuals

- Payments to individuals for services rendered
- Such payments are taxable (1099 & 1042 taxable) and include:
 - Payments to study participants
 - Awards (to non-employees and students)
 - Honoraria for guest speakers
 - Musicians/performing artists
 - Consultants/professional services

Payments to Individuals

- These payments are processed in Compass in the Accounts Payable module
- For access, complete this form and give it to Carolynn Miller for approval and processing:
- http://compass.emory.edu/security_forms/Compass%20Security%20Change%20Request%20Form_All_EEs_v15.pdf
- Training Documents and Supplemental Job Aids:
- http://compass.emory.edu/training/trn_ap.html

Payments to Individuals

- Individuals (non-employees) needing payment are required to complete a W-9 form:
- [https://www.finance.emory.edu/home/Procure%20and%20Pay/how to pay in the market place/W9formtaxpayer.pdf](https://www.finance.emory.edu/home/Procure%20and%20Pay/how%20to%20pay%20in%20the%20market%20place/W9formtaxpayer.pdf)
- Individuals desiring payment via direct deposit need to complete this form:
- <https://www.finance.emory.edu/home/Procure%20and%20Pay/ACHauthorization%20r.pdf>

Payments to Individuals who are Nonresident Aliens

- Payment for services rendered by those who are not US citizens or permanent residents of the US requires additional documentation:

https://www.finance.emory.edu/home/accounting_svcs/Accounting%20Help%20Desk/NRA_CHEATSHEET%20MC.pdf

- Foreign Source Statement

https://www.finance.emory.edu/home/accounting_svcs/Accounting%20Help%20Desk/FOREIGN%20SOURCE%20MC.pdf

- W-8BEN (instead of the W-9)

https://www.finance.emory.edu/home/accounting_svcs/Accounting%20Help%20Desk/W-8BEN.pdf

Access to Compass-Accounts Payable

- Bring your access request form to Carolynn Miller, rm 848 in the Grace Crum Rollins Bldg who will approve and send your request
- http://compass.emory.edu/security_forms/Compass%20Security%20Change%20Request%20Form_All_EEs_v15.pdf
- Complete the training with the simulation software and save copies of the supplemental job aid and additional support materials:
- http://compass.emory.edu/training/trn_ap.html

Emory Purchasing Card (P-Card)

- For purchases \$1,499.00 or less such as:
- Professional Licenses/Certificates
- Memberships and Registrations
- Subscriptions
- Emory Catering
- Local business meals or boxed lunches
- Recurring expenses such as storage, coffee services, box lunches for business meals

Emory Purchasing Card (P-Card)

- Use to purchase goods and services not available through Emory Express (check first!)
- Cell phone
- Van rentals
- Grocery store purchases
- Field purchases for immediate work-related use
- May not use to purchase restricted items
- Upper limit of \$1,499.00

Not Allowable on P-Cards

- Capital equipment
- Payments to individuals
- Leases and long-term rentals (get pre-approval from Emory VP for Business Services & General Counsel prior to processing in Emory Express)
- Animals
- Radioactive material
- Weapons and ammunition
- Controlled substances
- Medical/surgical supplies used in hospital or clinical patient care areas

P-Card Holder Responsibilities

- Ensure card security
- Comply with University policies
- Do not purchase prohibited items
- Do not share your P-Card
- Use only for University business purposes
- No purchase should exceed \$1,499.00 and charges should not be split across receipts to stay below this limit

P-Card Process

- Cardholder makes purchases
- Smartkey to be charged should be indicated on the receipt as well as *Business Purpose*
- Receipts need to be signed by the PI if the purchase is charged to a sponsored program
- Receipts need to be signed by the Department Chair if the purchase is charged to a department account

P-Card Exceptions

- For a temporary increase to the credit limit for a p-card, e-mail the business reason and dates for the request to both Carolynn Miller and Tascha Short prior to making the purchases
- For a temporary exception for a single transaction purchase limit, e-mail the business reason and dates for the request to both Carolynn Miller and Tascha Short prior to making the purchases

P-Card Holder Responsibilities

- Any exchanges or returns to suppliers should result in a credit to the account, never cash
- Except when purchasing food, flowers, or gasoline, it is the cardholder's responsibility to inform vendors that Emory is tax-exempt
- Purchase log, receipts, smartkeys to be charged, and signature authorization P-Card purchases must be provided to RSPH Business Services within 5 days of the purchase date.

RSPH Business Services

P-Card Process

- All P-Card purchases and receipts must reviewed within 5 business days of purchase and allocated to the correct smartkeys
- Purchases that are not allocated to the correct smartkey and account will default to a designated smartkey and account code
- Cardholders who are consistently delinquent in turning in signed receipts with smartkeys will have their cards revoked

Gifts and Celebrations

- There is an Emory policy that applies to all University departments and schools re: when it is and is not appropriate to give gifts or have celebrations paid for with University funds:
- http://policies.emory.edu/policy/index_pdf.cfm?policy_number=2.5

Local Business Meals

- Involve non-Emory individuals as participants
- Expenses must be reasonable and appropriate
- Receipts must be provided
- Specific Emory-related business need for the meal must be provided

Local Business Meals

- Meals with Emory colleagues should be considered a personal expense unless:
 - A non-Emory employee is present and business is being conducted; or
 - The meal is in honor of an Emory employee beginning or ending employment or significant other achievement; or
 - Business being conducted among Emory employees cannot be done in the office or at another time; or

Local Business Meals

- An explanation as to why the meeting could not take place in the office must accompany the purchase documentation/reimbursement request; or
- Rare or atypical instances, where, with the approval of a supervisor, employees may work during normal meal breaks, e.g., working lunches

Local Business Meals

- In all instances, a list of employees, their titles, guests, and their affiliations must accompany the request for reimbursement or charge to an Emory or sponsored program account
- An original, itemized receipt is also required
- See Policy 2.106 at policies.emory.edu

Questions?

Please contact:
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