

Best Practices – Financial/HR Management in CALS

Finance

- Purcard re-allocation: Get hard copy from PI, verify data, amounts, receipts and conformance to policy, enter into PeopleSoft
- Travel/Expense Reimbursement: Verify data, amounts, receipts and conformance to policy, have chair approve in PeopleSoft and send on to General Accounting
- Procurement: Collect information from department faculty, chair and/or staff on need for purchasing. Make purchase according to University policy and procedures.
- Follow Monthly Accounting Cycle

HR

- Recruitments in PeopleAdmin
- Hiring temps – use Temp Employee Request form for approval
- PA's and Distribution forms done electronically
- Changes to Distribution forms – verify grant dates, check if grant balance can sustain distribution change, check combo codes, percentages must add up to 100%
- Prepare APVs
- OT
- Terminations – use termination checklist

Grant Management

- Follow grant management best practices
- Cost transfers done on a timely basis
- Cost shares set up upon grant award notification
- Quarterly meetings with PI
- Close out in timely manner

Reporting

- Monthly reports for Chair on General Fund, Income & Expense activities
- Quarterly report on gifts and endowments
- Monthly reports to PIs on all active grants
- Review Close out reports