

For BC Finance to review with new classified, professional faculty, and academic faculty employees.

Purpose:

Ensures new employees receive consistent information regarding university finance policies and procedures.

Instructions:

Determine if the new employee will be responsible for adhering to the below finance topics. If the new employee will be doing work that is affected by these policies and procedures, go over the item using points from the guide on the following page.

_____	_____	_____	_____
Last Name	First Name	MI	University ID
_____			_____
Department			Hire Date
_____		_____	_____
Job Title		Employee Class	Position #

General Finance Knowledge

<input type="checkbox"/>	Introductions	
<input type="checkbox"/>	Budget Authority	http://fa.oregonstate.edu/pacs-manual/200-authority-and-records/202-authorities
<input type="checkbox"/>	Purchasing Roles	http://fa.oregonstate.edu/pacs/resources/reference-materials http://fa.oregonstate.edu/fis-manual/400-expenditures/410-expenditure-types http://fa.oregonstate.edu/fis-manual/400-expenditures/410-expenditure-types/410-25-payments-services
<input type="checkbox"/>	Procurement Card	http://fa.oregonstate.edu/business-affairs/financial-accounting-analysis/osu-purchasing-card
<input type="checkbox"/>	Travel Resource Page	http://fa.oregonstate.edu/business-affairs/travel
<input type="checkbox"/>	Hosting Policies	http://fa.oregonstate.edu/fis-manual/400-expenditures/410-expenditure-types/410-05-hosting-groups-and-official-guests http://fa.oregonstate.edu/fis-manual/400-expenditures/410-expenditure-types/410-07-refreshments-or-meals-unit-functions
<input type="checkbox"/>	Payroll	http://fa.oregonstate.edu/fis-manual/400-expenditures/401-payroll
<input type="checkbox"/>	Grant Information	http://oregonstate.edu/dept/fa/manuals/gcg
<input type="checkbox"/>	CORE/GRRS Orientation	http://oregonstate.edu/budget/sites/default/files/GRRS/GRRS-Simple/1final-grrs-simple-grrs-reports.pdf https://core.oregonstate.edu/reports/221

Guide

Introductions	Introduce new employee to their specific department accountant, as well as other individuals who they will be working with in the business center. For example, if there is a business center buyer, or a business center accountant that handles all the travel, introduce the new employee to these individuals as well. 5 min.
Budget Authority	Explain what it means to be budget authority. Determine if the new employee is responsible for any grants or administrative indexes. If so, reference all materials that provide knowledge and understanding on behalf of the institution for Budget Authority. Explain that unallowable purchases will not be allowed and that the budget authority for the specific index will be responsible for reimbursing the institution for any unallowable purchases made on behalf of the specific index (whether this reimbursement occurs or not - try to bind the new employee to the expectation that this is a standard and is common - in other words, catch them when they are "young"). 10 min.
Purchasing Roles	If the employee is determined to be purchasing goods on behalf of their department, go over the acceptable ways of purchasing said goods. Reference the Buy Orange website and allow the new employee to see the vendors already set up in the university system. Go over contracts, Personal Service Contracts, facility rentals, etc. Let them know that these contracts must be reviewed, edited and then signed by PCMM before they can be determined as fully executed. Inform them that employees cannot sign contracts on behalf of the institution. People who sign without the institution's signature will be held fully responsible and carry the full liability associated with the contract. This is to include online Click-Through agreements - until vetted through PaCS (once again, this harsh of language can be used on a case by case basis, but best to bind the new employee to the most extreme constraint and provide leniency later). 10 min.
Procurement Card	Go over the Procurement Card rules and list of allowable/unallowable purchases. Let them know that Custodians are responsible for keeping the card safe and making sure allowable purchases are made. Unallowable purchases will be reimbursed by the OSU Card User or Custodian, whoever was accountable for the unallowable purchase. 5 min.
Travel Resource Page	Provide a travel packet (if you need one, the AABC can give you one) for new employees to go over. This explains the different vendors, ways of travel, and most expedient methods - as well as additional documentation that is needed to process reimbursements, or the best ways to handle registrations, etc. 5 min.
Hosting Policies	Define Hosting. Explain that there are additional rules, regulations and extra documentation needed when making purchases for an event that is considered as "hosting." Show them FIS manual policies concerning Hosting (check/steal from AABC web site). 5 min. with handouts
Payroll	Explain EmpCenter. If they are a supervisor explain what they are responsible for. Explain yellow vs. red errors, as well as the time periods in which Payroll is posted (deadlines). 10 min.
Grant Information	Explain that they can only make purchases delineated by the grant on the grant index. Explain that grants are very restrictive, and that if they have any questions or have even the slightest bit of doubt that the item is not allowed on the grant, to contact the business center so that they are not forced to reimburse the University for the purchase. 5 min.
CORE / GRRS Orientation	CORE: Cooperative open reporting environment - brings in data across different reporting systems on campus - currently data warehouse has been uploading; others will follow. This database is available to anyone and can be used to pull specific, pre-created, reports with up to date information. Implemented in 2014, reports are still being created at the request of users and then uploading into the CORE system. GRRS: Grant Reporting and Reimbursement System - explain uses for grants and specific reporting pages that may be deemed as helpful. 5 min.
Total: 1 hour. (Assumes that employee has all of these responsibilities).	