

Business Services FAQ

School of Teacher Education & Leadership

The What's and Who's

Q: Who are my Business Services Staff and what do they do?

A: The School of Teacher Education and Leadership requires a big Business Services Team to support the multi-layered department and its many programs, clinics, and faculty. Overseen by the TEAL Business Manager, each of the different business services staff specialize in different areas to provide the Department with a full menu of services.

Metta Ray, Business Manager & Supervisor

Financial Oversight | Grant Management | Faculty & Staff Employment

Lachelle Hull, TEAL Business Assistant

Purchasing | Accounts Payable | Graduate Funding | Hourly Employment

Paula Reese, TEAL Business Assistant

Travel Specialist | Non-Capital Inventory

Patrick McBride, TEAL Business Assistant

Payroll Processing | Hiring Paperwork Submission

Travis Jimenez, GEAR-UP Business Manager

GEAR-UP - Grant Management | Employment

Shay Workman, GEAR-UP Business Assistant

GEAR-UP - Purchasing | Invoicing | Travel Processing

Q: What if I forget who to contact for a specific service?

A: No Problem. Contact any of us and we will direct you to the correct teammate; and, if a teammate is unavailable, we will do our best to help you in their absence.

Purchasing

Q: I need to buy a computer/laptop/equipment. What is the process?

A: Email the link with the computer specifications to lachelle.hull@usu.edu. She will purchase the equipment. USU has implemented a new process to unify and standardize IT support and computer management. New computers and laptops must be compatible with the USU computer management systems and applications and ordered through approved channels. Business Services will make sure that your new computers and laptops are compatible.

Q: Can I use my own Amazon account to purchase books, supplies, equipment, etc. and then submit for reimbursement?

A: USU has special pricing through our Amazon Business account which also includes tax exemption. If you use your Amazon account, you will not likely be reimbursed for taxes.

Q: I was asked to take a job candidate for a meal. How do I pay for the meal?

A: Contact lachelle.hull@usu.edu to arrange to check out a department P-card the day before the meal. You will need to have taken the 15 – 30 minute P-card training course prior to checking out the P-card. [Catalog | USU | Learn Blue \(myabsorb.com\)](#) Cardholder Training (2023-2025)

Q: I need to buy some supplies/books. Who do I ask to help me?

A: Email the link for the supplies/books to lachelle.hull@usu.edu. Please include the index to charge for the supplies/books. After the items arrive, you will be contacted to come pick them up. If you are at a statewide campus, please include the campus address where you want the supplies/books sent to.

Q: What is an Itemized receipt and when do I need one?

A: Itemized receipts are needed as documentation for every purchase. An Itemized receipt contains **ALL** of the following information provided by the vendor: the name of the company, the date, description of purchase, price of item and quantity per item purchased, and the total amount charged.

Q: Where can I get our Tax-Exemption Certificate and when should we use our Tax-Exempt status?

A: Please reach out to the Business Services Team if you need a copy of our Tax-Exemption Certificate. We should use our Tax-Exempt status anytime we make a purchase in the State of Utah.

Q: How do I know if a purchase is allowable?

A: Please reach out to the Business Services Team if you are unsure if a purchase is allowable. For questions related to GEAR UP you can contact Travis Jimenez or Shay Workman, for any other purchasing questions please contact Metta Ray.

Grant Management

Q: I am interested in applying for a grant, where should I start?

A: When considering applying for a grant, it is best to first consult with a Business Manager about the proposal plans. This can help initiate the process and they can help determine the next steps. Your Business Manager will help you communicate with the various USU Sponsored Programs offices and will be ready to help you spend funds once the funds are awarded.

Department Level Business Manager – **Metta Ray**

College Proposal Development Specialist – **Amanda Crosby**
Sponsored Programs Office - Pre-Award – **Sarah Baker**
Sponsored Programs Office - Post Award – **Rachel Stenta**
Sponsored Programs Office - Accountant – **Michael Ballif**

Q: I already have a Sponsored Programs Accountant, why do I need a Business Manager to help manage my grant?

A1: USU's Sponsored Programs Offices service the grant needs of the entire University so they rely on the department's Business Manager to ensure the grant funds are being used according to the Sponsor's Rules.

A2: Separation of duties aides in an extra layer of fraud protection. It keeps each person that is involved in the grant safe by ensuring that multiple levels of approvers can verify each expense is allocable, allowable, and appropriate.

Q: I am working on a grant proposal budget, what are some things to consider that will make life easier once awarded?

A: Different grant sponsoring agencies may have slightly different budgetary rules, but the following points are general tips to keep in mind.

- **Separate Categories**
 - Split expected expenses into the appropriate categories. Lumping expenses together makes it tough to reconcile and track – *Salaries, Benefits, Travel, Supplies, Other*
- **Know what is allowable (and who to ask if you don't know)**
 - Major budget items that are included in a grant proposal are tough to change later, if awarded. Do your best to anticipate challenges, and keep in mind, *if you are spending money, your business manager needs to be aware*
- **Get the most up to date information**
 - Things are always changing -

Hiring a New Employee

Q: How long does the hiring process take?

A: Depending on the workload, it may take up to 2-weeks once all hiring information has been received. No work should be done until all paperwork is completed

We also might want to just let them know to go to you or Lachelle before me and the reasons why??

Q: I want to hire an hourly worker. What is the process?

A: Before hiring anyone, it's necessary to contact Business Services to discuss the funding source....

Q: What is the process to hire a graduate assistant for my grant?

A: Contact lachelle.hull@usu.edu....

Posting a Student Job in Aggie Handshake:

Q: Can I post a job in Aggie Handshake by myself?

A: Yes! Once funding availability has been verified with the Business Manager, anyone can join our employer account with this link. As long as they use the invite link, they will be automatically approved and connected with our account upon completing the registration process.

https://usu.joinhandshake.com/employer_registrations/new?employer_invite_token=EiFuIXBG_W28iyfOYm4UuYW1jBjtfOb

Q: How long does a job need to be posted before I can hire my selected candidate?

A: Job posting must be posted for at least 24 hours or until a minimum of 3 applicants; whichever comes first.

Q: What information is needed when posting a job in Aggie Handshake?

1. Number of Intended Hires
2. Estimated Start Date & End Date
3. Location type: Onsite, Offsite, or Hybrid
4. Location type: Job, Internship, On Campus Student Employment, Other
5. Max Expected Work Hours Per Week:
6. Estimated Pay: Hourly Wage
7. Required Application Documents: Resume, Cover Letter, Transcript, etc.
8. Job Title:
9. Job Description:

Approving an Employee Timecard in AggieTime

Q: How often do I need to approve my employee's timecard?

A: On the 1st and 16th of each month a reminder will be sent to supervisors to approve their employee's time by the department deadline which should be no later than the end of day on the 16th and 1st (reminders might be sent early if the payroll window falls on a weekend). Supervisors should resolve and approve disputed hours and follow-up with employees who have not clocked-out and have open shifts.

HOT TIP: set a reminder on your calendar to look at your employee's times at the end of day on the 15th and last day of the month.

Q: Can I approve my employee's timecard early?

A: You can choose to approve early if you won't be available to approve over the weekend or holiday. Any hours your employees enter after you approve will be disputed and can be undisputed and approved for payment during the following pay period.

REMINDER: If you choose to approve early, you should notify your employees that they will not be paid for additional hours until the following pay period.

Q: My Employee has a disputed shift; how do I resolve the dispute?

1. Select the employee's name or A#.
2. Select the exclamation point icon  next to the disputed shift.
3. Enter a note (copy the note for pasting in remaining disputed records).
4. Select the "Resolve Dispute & Approve" button. The item will now have a flag and that is fine. Flagged records will pay, disputed records will not.

NOTE: Disputed hours **will not** be paid but Flagged hours **will** be paid.

Graduate Students

Q: My graduate student is traveling. How do I get funding for them?

A: Your graduate student can apply for a graduate travel award with the School of Graduate Studies <https://gradschool.usu.edu/costs/travel-grant#:~:text=Funding%20Amount,department%20or%20other%20university%20source>. A dollar for dollar match is required for all awarded graduate travel awards and can be funded with your grant and/or F & A. If you do not have funds available, please contact Steven Camicia regarding funding. A graduate student will only receive one (1) graduate travel award per academic year. For more information visit <https://gradschool.usu.edu/costs/travel-grant>.

Q: My graduate student is not taking courses this summer but will need IT Access to continue with research for their dissertation. How do they keep access to their files?

A: A student will maintain IT access for 30 days after they stop taking courses. If they take a semester off (including Summer), they will need to upload their research work on another device so they can have access to it. Another option is for a faculty member to pay the monthly IT charge (in 2024 it is \$12.40/month) from their F & A so their student can have IT access during the time the graduate student is not taking courses. Once the student begins courses, their IT access will be restored and they can download their files back onto Box.

Miscellaneous

Q: How do semester hires and student teacher supervisors keep their USU email addresses over the summer?

A: A person who was hired by TEAL as a semester hire or student teacher supervisor will maintain their USU email access for 90 days after their employment ends at the end of Spring semester (usually early May.) There are ~103 – 105 days until Fall semester starts. We can submit an EPAF (hiring form) 30 days prior to when semester hires and student teacher supervisors begin their Fall agreements. Therefore, as long as TEAL Business Services knows about these individuals and can submit their EPAFs early, they can maintain their USU email access. (USU sends an automated email close to 30 days after Spring semester has ended stating that a former employee will lose IT access after 30 days and later in the email it states that emails access will continue for 90 days after employment ends.)

Travel

Q: When should I make arrangements before I travel?

A: Please make arrangements **TWO WEEKS** before Travel. You have three purchasing options:

1. Purchase travel accommodations yourself and request reimbursement by submitting a TR. (You can request reimbursement as soon as your TA is approved.)
2. Contact Christopherson Business Travel. This is a state contracted travel agency. Call 1-800-367-3230 for assistance with booking.
3. Travel specialist can help purchase travel accommodations with the department p-card, but **only if it is 2 weeks+ before** the travel date. If it is less than 2 weeks before your trip, use one of the other options.

Q: The Travelor's Role on my TA / TR is showing that I'm a student. I'm not a student, I am an employee. Can you fix that on my TA / TR?

A: Unfortunately the role pulled directly from Banner and it is not editable. If you are an employee and you are auditing a class or you are also a student, then the Student role will trump the Employee role in Travel.

Q: I already have direct deposit set up, why do I need to do it again?

A: Employees and Students MUST have direct deposit set up for AP/Travel. This is different than direct deposit for Payroll. Instructions on how to set up direct deposit for travel:

Go to banner.usu.edu
Click Banner Dashboard
Login using your A# and password
Click Direct Deposit under All Users
Under Accounts Payable Deposit click Add New
Enter in direct deposit information
Check box on bottom Click Save changes

Q: If my partner or spouse is coming with me on a trip, do I select Companion Travel on the TA/TR?

A: Only select Companion Travel IF companion travel expenses are being incurred by the University.

Q: What is an Open Travel Authorization used for?

A: An Open Travel Authorization is used for reoccurring same-day mileage only travel. They must be closed at the end of each fiscal year. This may include driving related expenses such as parking, tolls, rental vehicles, fuel etc. This may NOT include meals of any kind, personally, University Paid or Meals and Entertainment.

Q: There is an option of Other on the TA/TR. What would be included in the Other category?

A: Examples include but are not limited to: Travel insurance, medical expenses (vaccines, covid testing), passports (will be taxable to the traveler), abstract fees etc.