Purchasing Technology - Please contact ITS at x4299

All technology purchases (computers, printers, copiers, etc.) are to first be approved by the Director of ITS. ITS has (1) a centralized budget for technology purchases, and (2) knowledge of how items interact with our current systems. Technology purchases made without advance approval by the Director of ITS may not be approved for payment.

University Gifts & Grants - Please contact Jennifer Steiner at x4057

All monies received as gifts or grants to the university are to be sent to Jennifer Steiner, of the Development Office, for proper recording and receipting prior to deposit. This ensures that the correct account is credited for the gift or grant, and allows the donor to be acknowledged and thanked appropriately by the Development Office. This also ensures that the university has appropriate information to receipt the donor accurately for tax purposes.

Gas vs. Mileage - Please call Kristine Wesson at x4128 (Business Office Guidelines for Operation, pg 12)

Individuals assigned university-owned vehicles for business purposes should charge gasoline to university credit cards. Expenses for use of personal vehicles must be turned in as a request for mileage reimbursement rather than as gas purchases. Please do not charge gas to university credit cards for personal vehicle usage. Departments wishing to conserve resources may document total expenses and approve lesser amounts. A sample mileage reimbursement request form is available on the Business Office website.

Purchase Orders - Please call Kathy Ray x4117 (Business Office Guidelines for Operation pg. 10)

PURCHASE ORDERS are printed each Tuesday and Thursday. In general, please obtain a P.O. number for purchases of $1000 or more. When your items are received, sign the yellow copy of the purchase order and forward it to the Business Office. All invoices should come directly to accounts payable, but should your department receive an invoice, simply forward it to the Business Office for payment.

Sales Tax - Please contact Kristine Wesson at x4128 or see Business Office Guidelines

Anderson University is incorporated as a 501(c) (3) non-profit organization and is exempt from Indiana state sales tax. (We are also exempt in Florida, Illinois and

New York, for those who may need to make purchases occasionally in those states.) Most purchases on behalf of the university should reflect this status and be net of sales tax. Tax exempt forms are available in the Business Office. The university will not reimburse individuals for payment of state sales tax. Part2: Any item purchased tax-exempt by Anderson University and in turn re-sold to individuals (students, employees, or others), must include sales tax, which is then to be submitted to the State of Indiana. (This does not include departmental transfers.) Examples would include, but are not limited to, office furniture being "retired" or equipment for student athletes. (Reminder: Required class supplies and textbooks are to be sold through the university bookstore and should not be sold directly to students through departments or professors.)

Example: Athletic shoes sold to student athletes $50.00 Sale price of shoes to student (deposit to budget-charged for original purchase by department) $3.50 7% Indiana sales tax (deposit to 00010-2002) $53.50 Total amount to be collected from student and deposited

Gifts to Students/Employees - Please contact Kristine Wesson at x4128.

Christmas, birthday, graduation, appreciation, or other gifts to students or colleagues should be paid by individuals, personally, and not out of operating or restricted budgets. Please "pass the hat" if you wish to express seasonal or other celebratory best wishes to students or colleagues. This would not be considered appropriate use of operational dollars.

Reimbursement Policy - Please contact Wendy Frank at x4115.

The Business Expense Reimbursement Policy outlines appropriate university expenses and how to be reimbursed if you spend personal funds toward approved and documented business expenses. The policy was adopted by the Board of Trustees in Fall 2009 and is available on the AU website. It contains numerous guidelines for how to appropriately expend university resources.

Bookstore Purchasing - Please contact Kristine Wesson at x4128, or Dustin Martin (AU Bookstore) x4150. Departmental purchases from the bookstore may be made via inter-departmental transfer rather than using your university MasterCard. This will eliminate sales tax and reduce credit card fees. You can give them your budget # to directly charge your department.

Vending - Please contact Ginger Miller at x4120.

If you've lost money or received product in error from campus vending machines, you may be reimbursed at the Cashier's Window (Decker Hall, Monday-Friday, 9:00 a.m.-3:30 p.m.).

Office Supplies - Please contact Whitney Jimenez at x4060.

Normative purchases of office supplies should be done online through Office360. This efficient, cost-effective purchasing method also saves payment of state sales tax since Office360 has our tax exempt number on file. While there is no minimum requirement, orders of $75 or more are preferred. Business & Auxiliary Services coordinates this contract and can be of assistance should you have specific questions. To get started, request a new ID.

Want to make a personal purchase? Our discounts can apply to faculty, staff and students. For details on making personal orders, contact Business & Auxiliary Services. Please consider combining orders with other departments, or accumulating items to be ordered over time and place a larger order that meets the $75 preferred threshold. Questions?

Travel vs. Professional Development - Please contact Kristine Wesson at x4128

These two expense accounts are very similar but serve different purposes and are reported separately on the university's tax return: Travel (7400) and Professional Development (7401). Use Travel (7400) for transportation, lodging, and meal expenses (e.g. airfare, mileage, hotels, meals). Use Professional Development for training opportunities (e.g. conference registrations, seminars, etc.). If a travel experience involves both types of expenses, please separate them according to purpose. This will help the university to most accurately record and report these activities.

AU Mail Center - Please contact Ginger Miller at x4120.

Sending Mail: When sending out mail, please be sure to indicate a return address with your budget number. Also, please note if it needs special handling (e.g. tracking, time sensitive, needs insured, etc.).We have several options in sending mail which include express mail, priority mail, certified, and UPS. Having this information helps us to determine the best and most cost-efficient way to send your mail/package and will save delays in the processing of your mail.

Envelope Size: When sending several pieces of paper in one envelope, consider using a 6"x9" envelope and folding the papers in half versus the trifold method which can cause the envelope to be too thick to go at letter rates. Envelopes up to 6"x9" can go at letter rates as long as they are less than 1/4" thick. The mail center has a template to check the thickness of your envelope at the package window or at the cashier’s window.

Addressing Envelopes: When addressing envelopes, the university can get a discount on the postage rate if the address is typed or printed instead of handwritten. The address also needs to be centered in the middle of the envelope with clearance of 5/8" across the bottom. This also cuts down on delays and undeliverable mail due to illegible addresses. These guidelines apply to both 1st class letters and flats.

Mailing Packages: Priority flat-rate packaging versus regular priority mail can be an easy way to save postage costs. If you have an item that weighs more than 13 ounces, it might be more cost efficient to send it in a priority flat-rate envelope or box instead of regular priority. The cost is determined by weight and destination of the package, and there is no charge for the packaging.

International mail: Sending mail out of the country? International addresses should have the country listed alone on the bottom line of your address. Letters and flats under 13 ounces do not need a customs form, however, all international parcels (no matter their weight) will need a customs form. Items weighing 1-4 pounds must include a small customs form. Any packages over 4 pounds must include a large customs form. Due to USPS regulations, customs forms must be filled out electronically through USPS Click-n-Ship. Once complete, please print the form and bring to the mail center along with your package.

General Business Office Procedures - Please contact the Business Office

If you have questions about Business Office processes or procedures, please visit the Business Office Guidelines for Operations. Lots of information regarding "how to" and "whom do I contact," as well as sample requisitions and other forms. Additionally, we can offer Business Office training sessions

Check Enclosures - Please contact Kathy Ray at x4117, or Kristine Wesson at x4128

When you need to enclose a registration form, contract, letter, copy of invoice, or any other documentation with a check, please be sure to **staple** a copy of that documentation to the requisition/invoice and **paperclip** the “to be sent” document to the requisition for payment. The Business Office will keep the copy for our records and will mail the original to the vendor with the check.

Requisitions - Please contact Kristine Wesson at x4128

If you have an original invoice, you no longer have to provide a requisition form. Invoices typically detail all of the information needed by the Business Office to process payment. Simply have an authorized budget-signer sign it and date the invoice, provide the appropriate budget number to be charged, and forward the invoice to the Business Office. We also have printing labels available on our website if you would prefer. Save yourself the time of preparing a requisition and save stress and printing dollars at the same time.

Transfers between departments - Please contact Kristine Wesson at x4128

Requisitions for transfers between departments require the signature of both budget directors. Please be sure to secure authorized signatures for both the "requested by" (department to be credited) and "departmental approval" (department to be charged) departments. The requisition form is available on our website.

Invoicing - Please contact Amy Wolfe at x4114 or Mark Smith at x4119

If your department provided services and needs to bill a vendor, or anyone outside the university, please be sure to complete an Invoice Request Form, available on our website. All university related invoicing is processed through the Business Office. The Business Office will process the request promptly upon receipt. The income will be reflected immediately into the department budget, and the Business Office will take on the responsibility of obtaining payment.

MasterCard - Please contact Randy Coppess at x4166

Tired of waiting for your reimbursement to be deposited? Cut the hassle and use your AU MasterCard to purchase items off-campus for departmental use rather than personal funds. Don't have a MasterCard? Check with someone in your department - maybe they're able to purchase that item. For guidance on MasterCard related purchases, check out the Business Office website.

W-2 - Please contact Kristine Wesson at x4128.

Tired of waiting for your AU W-2 to come in the mail? Need a previous year's W-2?

To do so electronically, you will first need to give consent. Here are the steps to do so. Go to accessau.anderson.edu, and login in to AccessAU HR using your network log in. Navigate to: Main Menu > Self Service > Payroll and Compensation > W-2/W-2c Consent Check the box next to "Click here to indicate your consent to receive electronic W-2 and W-2c forms" Click Submit When prompted, enter your network password for verification Once your W-2 is available, you will receive an e-mail notification from AccessAU HR with instructions for printing your W-2. Go to accessau.anderson.edu, and login in to AccessAU HR using your network log in. If you have already given consent, here are the steps to access your W-2/W-2c forms electronically: Navigate to: Main Menu > Self Service > Payroll and Compensation > View W-2/W-2c Forms (please note that in order to view your W-2, you will need to accept consent. See FAQ #1 for instructions) Select "Year End Form" Print the PDF of your W-2 *You will need a PDF viewer in order to review/print your W-2

Volunteers - Please contact Kathy Young at x4134

If your department is planning to use non-employee volunteers, you will want to provide a volunteer agreement. Contact Human Resources for a sample of this type of letter to be agreed upon by both parties.

Budget Directors - Please contact Kristine Wesson at x4128

Faculty and Staff changes in your office? Ensure our records are up-to-date by sending an e-mail to the Business Office when there are changes in your department to update Budget Access and Signing Authority. Be sure to specify the employee's name, department number for access, and the type of access (i.e. Budget Look-up and/or signing authority, including maximum amount).

Catering - Please contact Whitney Jimenez at x4060 or Christy Nelson at x4261.

All charges for departmental catering from Anderson Dining Services are automatically charged to the department and account given at the time of ordering. No additional authorization is needed. You'll receive a copy of the invoice via email for your records.