

2                   **Department of Fisheries and**  
3                   **Aquatic Sciences**

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6                   **Handbook of Administrative**  
7                   **Operations for Faculty & Staff**

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9                   *(March 2005)*



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19   **This handbook is a resource designed for new employees. It is not the definitive source**  
20 **for UF / IFAS rules and regulations. If you have questions, please ask the senior staff**  
21 **person with responsibility in that area. If you require further clarification, you may refer**  
22 **to the UF / IFAS publications specific to that office as those publications are designed to**  
23 **meet Florida laws and IFAS rules and regulations. Please contact the Department's**  
24 **Administrative Assistant at 392-9617 ext. 222 if you find any discrepancies. We tried to**  
25 **tailor this handbook as a quick and easy reference tool that will be updated annually to**  
26 **reflect any University and IFAS policies changes.**  
27

**Table of Contents**

2  
3  
4 [Department of Fisheries and Aquatic Sciences Administrative Directory](#) ..... 3  
5 [Mission Statement](#)..... 4  
6 [INFORMATION FOR NEW EMPLOYEES](#)..... 5  
7 [FAS MAIN OFFICE](#) ..... 6  
8     [DEPARTMENT CHAIR’S OFFICE](#) ..... 10  
9     [ACADEMIC & GRADUATE OFFICE](#)..... 11  
10    [HUMAN RESOURCES / PERSONNEL](#)..... 15  
11    [BUDGETING AND ACCOUNTING OFFICE](#) ..... 20  
12        [BUDGET DEVELOPMENT & ALLOCATION](#) ..... 20  
13        [PURCHASE ORDERS AND FISCAL PROCESSING](#)..... 23  
14        [PURCHASING CARD & TRAVEL](#) ..... 26  
15        [CLINICAL BILLING](#) ..... 30  
16        [FAS VEHICLE USE](#) ..... 31  
17        [ACRONYMS AND DEFINITIONS](#) ..... 34

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## Department of Fisheries and Aquatic Sciences Administrative Directory

| <u>OFFICE</u>  | <u>STAFF &amp; EMAIL ADDRESS</u>  | <u>PHONE #</u> | <u>LOCATION</u>   |
|--|---|----------------|---|
| <u>FAS Main Office</u>   | Main Switchboard<br>Phone: (352) 392-9617<br>Fax: (352) 392-3672  |                | 7922 NW 71 <sup>st</sup> Street<br>Gainesville, FL 32653<br><br>P.O. Box 110600<br>CAMPUS |
| <u>Chair's Office</u><br>Chair                                 | Dr. Karl Havens<br><a href="mailto:Khavens@ufl.edu">Khavens@ufl.edu</a>                                       | Ext. 232       | Bldg. 1232, room 3  |
| Administrative Assistant *                                     | Michelle Quire<br><a href="mailto:mquire@ufl.edu">mquire@ufl.edu</a>  | Ext. 222       | Bldg. 1232, room 5  |
| <u>Academic &amp; Graduate Office</u><br>Program Assistant     | Sherry Giardina<br><a href="mailto:sherryg@ufl.edu">sherryg@ufl.edu</a>                                       | Ext. 233       | Bldg. 1232, room 4  |
| <u>Human Resources / Personnel</u><br>Administrative Assistant | Michelle Quire<br><a href="mailto:mquire@ufl.edu">mquire@ufl.edu</a>  | Ext. 222       | Bldg. 1232, room 5  |
| <u>Budgeting &amp; Accounting Office</u><br>Office Assistant   | Jennifer Hermelbracht<br><a href="mailto:jhermelbracht@mail.ifas.ufl.edu">jhermelbracht@mail.ifas.ufl.edu</a> | Ext. 259       | Bldg. 1232, room 7  |
| Sr. Fiscal Assistant   | Melissa Altomari<br><a href="mailto:matloma@ufl.edu">matloma@ufl.edu</a>                                      | Ext. 221       | Bldg. 1232, reception<br>area   |
| <u>Purchasing Card &amp; Travel</u><br>Sr. Fiscal Assistant    | Melissa Altomari<br><a href="mailto:matloma@ufl.edu">matloma@ufl.edu</a>                                      | Ext. 221       | Bldg. 1232, room 7  |
| <u>Clinical Billing</u>  | Jennifer Hermelbracht<br><a href="mailto:jhermelbracht@mail.ifas.ufl.edu">jhermelbracht@mail.ifas.ufl.edu</a> | Ext. 223       | Bldg. 1232, reception<br>area   |

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\* The Administrative Assistant can schedule meetings with the department Chair.

## Mission Statement

The mission of the Department of Fisheries and Aquatic Sciences is to advance our basic and applied knowledge of the biological structure, function, and productivity of Florida's freshwater, estuarine and marine ecosystems. This mission includes providing knowledge of the factors that influence the biological structure, function, and productivity of Florida's diverse aquatic environments. Knowledge from these research programs shall promote the wise management of Florida's aquatic biological resources, aquaculture and, more generally, the environmentally sound use of the State's overall water resources.

The Department reaffirms the basic philosophy of America's land-grant universities that asserts that education should be open to all people and that education should be practical as well as classical. The Department is therefore committed to a three-fold mission of teaching, research, and public service that will provide Floridians with the knowledge needed for the future management of Florida's diverse aquatic resources.

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## INFORMATION FOR NEW EMPLOYEES

Message to all new employees:

Contact the Department's Administrative Assistant to complete all the required personnel paperwork **prior** to your start date. At that time she will inform you of all security and access needs that you may need, such as purchasing cards, access to Peoplesoft (provides balances of your grant accounts, and other required utilities), or department keys.

Contact the fiscal office if you need office supplies, furniture, or equipment. They will assist you and discuss the Department's policies and procedures for ordering equipment and supplies.

Contact IFAS' help desk at 392-4636 for assistance with a new email account. This office can also assist anyone who needs to configure a new computer. Please keep this number for future reference.

Additional message to new faculty:

Contact the Department's Office Assistant to ensure that your accounts / grants are set up and that all required documents are completed and submitted.

If you will serve on graduate student committees, then you will need a Graduate Faculty Appointment in our Department. Additional information regarding the procedures and this appointment is in the Human Resources / Personnel section of this handbook.

FYI: The Department's mailboxes are located in the red brick building (Bldg. 1232) in room 2. You will also have access to the Department's copier, fax machine, FEDEX and other mail related material, and office supplies that are located in this room. Please do not remove the items located on the table, such as the stapler and pens. These items are made available for convenience.



2  
3 **Telephone:**

4 The Department's main telephone number is (352) 392-9617 (SUNCOM 622-9617).  
5 Callers are able to access our Department's directory when calling this number.  
6

7 Calling an outside phone number from your telephone: There are two different  
8 telephone models in our department.  
9

10 1.) Local calls:

- 11 a. If your telephone has an "Outgoing" button on it, then follow these  
12 instructions: press the "Outgoing" button, dial "9" for an outside line, then the  
13 7-digit number.  
14 b. If you do **not** have this button on your telephone, then do the following: press  
15 "9-1-9", then the 7-digit phone number.  
16

17 2.) Long distance calls:

- 18 a.) If your telephone has an "Outgoing" button on it, then press the "Outgoing"  
19 button, dial "9 - 1 - area code - 7-digit phone number".  
20 b.) If you do **not** have this button on your telephone, then press "9 - 1 - 9 - 1 -  
21 area code - 7-digit phone number."  
22

23 Special note regarding the SUNCOM phone service: SUNCOM is the state long  
24 distance system for calls within the US, Puerto Rico, Virgin Islands and Canada. Some  
25 of the state's long distance offices have SUNCOM phone numbers. You would do this  
26 by pressing "8", then the 7-digit SUNCOM number.  
27

28 Voice Mail Quickstart:

29 To open and initialize your mailbox, follow these steps:

- 30 1. Press the "feature" key, then "9 8 1" to open your mailbox.  
31 2. Press "0 0 0 0" (the default password) and press "OK" or the "#" key.  
32 If you should have problems with the default password, please contact  
33 the Department's receptionist for assistance. There is a possibility  
34 that the phone was not reset to the default password after the  
35 previous phone owner. He / she can reset that for you.  
36 3. Choose a password from 4 - 8 digits long that does not start with "0".  
37 Enter your new mailbox password and press "OK" or the "#" key.  
38 4. Enter your new mailbox password again and press "OK" or the "#"  
39 key.  
40 5. At the tone, record your name in the directory.  
41 6. Press the "RLS" button to end this session.  
42

43 Callers will be able to leave voice messages after you initialize your voice mail.

44 Please note that a manual should be near each phone but if you cannot locate one,  
45 please call the reception desk for a copy.  
46

47 **Fax:**

48 A fax machine is available for faculty, staff, and graduate students working on official  
49 business and authorized by their major professor. The fax cover sheets are available in  
50 one of the left hand drawers next to the fax machine. Incoming faxes are checked  
51 periodically by the Department's staff and placed into the appropriate mailboxes. Please  
52 notify the fiscal office if you notice we are out of fax supplies. Our Department fax

2 number is (352) 392-3672 (SUNCOM 622-3672). Please note that the instructions on  
3 how to operate the fax are posted on the bulletin board above. The fiscal office is  
4 available if you have questions.  
5

#### 6 **Photocopying:**

7 Photocopiers are available for department employees, including graduate students  
8 making copies on behalf of faculty, in Bldg. 1232, room 2 and in Bldg. 544, room 2. We  
9 ask that the users clear all copier jams before leaving. The fiscal office is available if you  
10 need assistance. Please contact the fiscal office if you notice we are low on copier  
11 supplies. Copiers are for official business. **No books are to be copied!** Currently the  
12 Department does not keep a record of the number of copies each employee generates,  
13 however abuse of our lax policy to make personal copies or the excessive copies of  
14 books may move the Department towards charging the individual faculty accounts to  
15 help pay for the cost.  
16

17 We suggest that you use either the IFAS Print Shop or a private vendor, such as  
18 Renaissance Printing, for your bulk copying. Our copiers are generally for smaller jobs.  
19

#### 20 **Supplies and Equipment:**

21 Office supplies such as staplers / staples, paper clips, stapler removers, pens, tape, and  
22 file folders are available in modest supply to faculty (excluding graduate assistants) in  
23 Bldg. 1232, room 6. We provide them to faculty who have restrictions on their individual  
24 grants, such as the Federal Cost Accounting Standards. Faculty who have state  
25 contracts or funds are expected to purchase their own office supplies.  
26

27 Other equipment and supplies available in our copy / mailroom includes: paper cutter,  
28 stapler for large documents, 3-hole punch, packing tape, and FEDEX and other mailing  
29 material.  
30

#### 31 **Time reporting / Leave Slips / Paychecks:**

32 Employees are to report time worked at [www.my.ufl.edu](http://www.my.ufl.edu). The employee must use their  
33 gator link ID in order to access this system. Contact Michelle Quire for access.  
34 Employees are paid bi-weekly and on a Friday.  
35

36  
37 Time worked may be approved by his / her supervisor by the deadline to receive a paycheck.  
38 **Please note that the faculty should designate a staff member who can approve the**  
39 **time worked in his / her absence.** If no time is inputted and approved, no paycheck  
40 can be created. Annual leave must be approved within the pay period it is used. Sick  
41 leave must be reported promptly upon returning to work.  
42

43 Note to new employees: Generally it takes approximately 3 – 4 weeks to process a new  
44 employee's personnel paperwork. Once the employee completes the necessary forms  
45 at the Department level, they are forwarded to IFAS Personnel for signature, and then to  
46 the UF Personnel Processing and Records for final processing. This is why we  
47 encourage the supervisors to notify our Department's Personnel Office *before* the  
48 employee begins work. On a financial need basis, we can process an emergency check  
49 request. However, the personnel appointment must go through the process above and  
50 the appointment must appear on the UF Personnel Employee File (internal database),  
51 which still requires the 3 – 4 week processing time before we are able to make such a

2 request. Please contact the Department's Personnel Office if you should have any  
3 further questions at ext. 222.

4  
5 Academic Personnel has made available on-line the pay period dates, payroll  
6 processing deadlines, and paydays at the following location:

7 <http://fa.ufl.edu/payroll/paydays-2005-2006.asp>.

8  
9 **Working Out of the Office:**

10 If you plan to work out of your office for an extended period of time, then you should  
11 record a new voice mail message letting callers know when you will return. If your e-  
12 mail software supports similar messages, then we encourage you to set up the  
13 automatic replies prior to your leave.

14  
15 Follow the instructions below to record an 'alternate mailbox greeting'.

- 16 1.) Press "Feature" then "9 8 1" to open your mailbox.
- 17 2.) Enter your password and press "OK" or the "#" key.
- 18 3.) Press "ADMIN" or "8".
- 19 4.) Press "GREET" or "2" to select greeting options.
- 20 5.) Press "REC" or "1" to record your greeting.
- 21 6.) Press "ALT" or "2" to record your Alternate Mailbox greeting.
- 22 7.) Press YES or "1" to record your greeting.
- 23 8.) At the tone, record your greeting.
- 24 9.) Press OK or the "#" key to end your greeting.
- 25 10.) After you record your greeting you can:
  - 26 • Press PLAY or "1" to listen to your greeting.
  - 27 • Press RETRY or "2" to erase and re-record.
  - 28 • Press OK or "#" to accept your greeting.
- 29 11.) Press the "RLS" button to end the session.

30  
31 If you should need further assistance with your telephone, then you can contact the  
32 Department's Program Assistant.  
33

2 **DEPARTMENT CHAIR'S OFFICE**

3  
4 Location: Building 1232, Room 3  
5 Note: The Department's Administrative Assistant handles mail, files, and appointments  
6 for the chair.  
7 Contact: Michelle Quire, Administrative Assistant  
8 Phone: 392-9617 ext. 222  
9 Email: [mquire@ufl.edu](mailto:mquire@ufl.edu)  
10 Office Hours: Monday – Friday from 8:00 AM – 5:00 PM

11  
12 **Appointments:**

13 Contact the Administrative Assistant to make appointments with the Chair. Drop in visits  
14 are generally welcome.

15  
16 **Signatures:**

17 Leave materials that need the Chair's signature in either the Chair's or the Administrative  
18 Assistant's mailbox. Items will be reviewed, signed, and returned to you in a timely  
19 manner.

20  
21 **Messages:**

22 The mail, phone messages, and fax messages for the Chair go through the  
23 Administrative Assistant's office who will ensure that matters are addressed in a timely  
24 manner. The Chair checks his own email.

25  
26 **Files and Records:**

27 Department personnel files are maintained by this office. This includes position  
28 descriptions, performance evaluations, courtesy faculty appointments, all OPS &  
29 TEAMS/USPS appointments, and faculty annual evaluations.

30  
31 **Meeting Agendas / Minutes:**

32 The Administrative Assistant will distribute agendas and minutes for the Executive and  
33 Faculty Committees. This person will also assist all other Standing Committees.

34  
35 **Department Calendar of Events:**

36 The Administrative Assistant generates the Department's calendar and Administrative  
37 Timetable. This is a schedule of annual and monthly items that help the faculty, staff,  
38 and students with work planning. Please submit any items that you wish to have added  
39 via email or by regular mail.  
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## ACADEMIC & GRADUATE OFFICE

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|---------------|--|
| Location:     | Building 1232, Room 4  |
| Note:         | The student services office serves as a liaison between the students, the University, and the Department. It will answer questions and assist with student related procedures. |
| Contact:      | Susan Morgan, Program Assistant  |
| Phone:        | 392-9617 ext. 233  |
| Email:        | <a href="mailto:skmorgan@mail.ifas.ufl.edu">skmorgan@mail.ifas.ufl.edu</a>   |
| Office Hours: | Monday – Friday from 8:00 AM – 5:00 PM   |

|                              |                                  |
|------------------------------|----------------------------------|
| <i>Graduate Coordinator:</i> | <i>Edward Philips, Professor</i> |
| <i>Location:</i>             | <i>Bldg. 542</i>                 |
| <i>Phone:</i>                | <i>392-9617 ext. 248</i>         |
| <i>Email:</i>                | <i>phlips@ufl.edu</i>            |

|                                   |   |
|-----------------------------------|---|
| <i>Undergraduate Coordinator:</i> | <i>Debra Murie, Assistant Professor</i> |
| <i>Location:</i>                  | <i>Bldg. 542</i>                        |
| <i>Phone:</i>                     | <i>392-9617 ext. 245</i>                |
| <i>Email:</i>                     | <i>dmurie@ufl.edu</i>                   |

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### **Academic Advisement:**

25 Appointments with the Graduate Coordinator are made directly with that faculty member.  
26 The Department's Academic & Graduate Office can provide answers to general  
27 questions regarding University and Department academic policies but will not be able to  
28 provide individual academic advisement. The students need to refer to their supervisory  
29 committee members for individual advisement.

30  
31

### **Class Schedules / Rolls / Textbooks / Grades:**

32 This office assists faculty with the development of semester course scheduling, room  
33 reservations, and the ordering of textbooks. Class rolls, grade input & reports, grade  
34 changes, and letter of appointments are also maintained in this office. If faculty have  
35 questions or problems regarding their class schedule, class rolls, grade reports, or grade  
36 changes, then they should contact this office.

37  
38 Please note that the Department's Conference Room is located in Bldg. 544, room 23.  
39 The reservation book is located at the receptionist's desk.

40  
41

### **Prospective Students:**

42 All general inquiries regarding our graduate program and minor are handled in this  
43 office. Admission application packets are mailed and all correspondence is generated  
44 from the Program Assistant. *Please contact this office if you are interested in accepting  
45 an applicant as a graduate student.*

46  
47

### **Registration and Drop / Add:**

48 The Program Assistant is responsible for providing the appropriate forms and answering  
49 any inquiries regarding student registration and drop / add (schedule adjustment).  
50 Information is also published in the University of Florida's Graduate Catalog and the

2 Schedule of Courses. We strongly encourage students to refer to the Registrar's  
3 homepage for semester course listings, as this is the most up-to-date information  
4 located at <http://www.reg.ufl.edu/>.

5  
6 **Student Forms and Printed Information:**

7 Copies of graduate catalogs, brochures, syllabi, and UF forms are filed in this office.  
8 This includes drop / add, grade change, supervisory committee, admission to candidacy,  
9 and final examination forms.

10  
11 **Schedule of Courses:**

12 The Program Assistant coordinates with the faculty in creating the course schedule each  
13 semester. This person notifies the faculty when the deadline is approaching for the  
14 submission of the upcoming term's course schedule. When this notice is received, the  
15 faculty should then inform this office of the courses they plan to teach.

16  
17 Information that needs to be provided to this office include course prefix and number (i.e.  
18 FAS 5901), instructor's name (may be more than one), and the room location preferred..  
19 Please note that we will do the best we can to accommodate our faculty and students  
20 with classroom space but many times it is difficult to reserve the space due to the high  
21 demand for the classrooms. Additional things to consider and that should be  
22 communicated to us is the enrollment cap, if applicable (by default set at 999);  
23 departmentally controlled, if applicable; and the number of credit hours if this is a  
24 variable credit course.

25  
26 Changes to the schedule can be made after it is created. This includes canceling the  
27 course due to low enrollment, changing the room location, and adding additional  
28 features such as an enrollment cap or making the course departmentally controlled so  
29 that the section number is 'hidden' to require students to see the Program Assistant for  
30 registration. The departmentally controlled feature is strongly encouraged for those  
31 courses (Special Topics) that are created for only one or a few students in mind as an  
32 agreement between the instructor and students. This is not common practice but it does  
33 occur in special circumstances.

34  
35 Note regarding Special Topics courses: It is strongly encouraged that the instructor  
36 provides our office with the appropriate title for this revolving topics class so that it  
37 appears on the students' transcripts.

38  
39 **Establishing a New Course in the Department:**

40 The forms and additional information about this process are available in this office.  
41 Please speak with the Program Assistant for assistance in preparing the paperwork.  
42 This person will also work with the Graduate Coordinator, Graduate Committee, and  
43 Chairman so that your request is reviewed in a timely manner.

44  
45 **Student Records and Files:**

46 The Program Assistant maintains all student files. The faculty advisor and committee  
47 members have access to his / her student's file for academic counseling purposes.  
48 There is a check out sheet located in the front of each student's folder. It is the  
49 responsibility of the person who checks out the file to sign the form. This form remains  
50 in the office so that the Program Assistant can relocate the file when necessary.  
51 *Students' records are confidential and may not be viewed by another student or  
52 unauthorized person at any time. The student may view his or her own file with prior*

2 *permission from the Graduate Coordinator. Please note that if the student waived his /*  
3 *her right to read the letters of recommendation, then these will be removed before the*  
4 *student can view the file. In this case, the file may not leave the Program Assistant's*  
5 *office.*

6  
7 This office will also track the progress and requirements for the Department's students  
8 throughout their academic career. Please note that it is required that a Program of  
9 Study form be completed by the student and supervisory committee prior to the end of  
10 the student's second term. The information on this form will assist our office with student  
11 tracking and progress. The Program Assistant is also responsible for maintaining  
12 student applicant and enrolled information in an internal database that allows for easy  
13 retrieval of academic and statistical information.

#### 14 15 **Student Bulletin Boards:**

16 Bulletin Boards are located in the mail / copy room. Information pertaining to seminars,  
17 awards, course announcements, and internships are posted. If anyone is interested in  
18 contributing or adding to these boards, then they should leave the information with the  
19 Program Assistant.

#### 20 21 **Instructor Evaluations:**

22 The students will have the opportunity to evaluate a course and instructor each term.  
23 The Program Assistant will ask for a student volunteer to distribute the evaluation forms  
24 during the last class meeting time and before final exam week. This student will collect  
25 the completed forms and place them in a sealed envelope and return them to the  
26 Program Assistant immediately following the course. After she collects all the forms for  
27 the Department's courses, she will return them to the IFAS Dean's Office. The  
28 Department's Chair will receive the scores for the first half of the questions, Department  
29 mean, and College mean after they have been tallied. This information is filed and  
30 maintained in the Department's Academic and Graduate Office. They will remain  
31 confidential.

32  
33 Faculty who are applying for tenure or promotion may view their own file in order to  
34 prepare the teaching section of their packet. Please speak with the Program Assistant  
35 for assistance on where this information is located.

#### 36 37 **Graduate Assistantship Evaluations:**

38 Students who receive graduate assistantships are evaluated by their advisor each term.  
39 Part of the conditions of their assistantship is to maintain satisfactory coursework and to  
40 complete any additional requirements that your advisor has assigned to them. The  
41 Department is currently undergoing minor changes on how we will proceed with this  
42 requirement. We are working out the details so that the Program Assistant will distribute  
43 the form to each advisor so that they can meet with each of their graduate assistants.  
44 These forms would be completed and returned to the Program Assistant so that she can  
45 file a copy in the student's file, forward the original to the appropriate office, and inform  
46 the Department's Personnel Office of any changes to a student's personnel appointment  
47 if an 'unsatisfactory' rating is indicated. In the past the Department's administrative  
48 office had little to do with this process but this has created a communication barrier for  
49 our Student Affairs and Personnel Office who has to renew the students' contracts via  
50 the letter of appointment file on-line each semester.

2 *Please note that content related to students, such as the Department's Student Handbook,*  
3 *faculty interests, Departmental newsletter, etc. are located and on the Department's website*  
4 *(<http://fishweb.ifas.ufl.edu/>) for easy reference. The Program Assistant is responsible for*  
5 *keeping this information current.*  
6

## HUMAN RESOURCES / PERSONNEL

Location: Building 1232, Room 5  
Note: The Administrative Assistant processes all personnel actions for the Department.  
Contact: Donna Roberts, Administrative Assistant  
Phone: 392-9617 ext. 222  
Email: [dcroberts@mail.ifas.ufl.edu](mailto:dcroberts@mail.ifas.ufl.edu)  
Office Hours: Monday – Friday from 8:00 AM – 5:00 PM

### Evaluations:

Employee evaluations are completed annually for USPS, A&P, and faculty. New USPS employees have an initial 6-month evaluation at the end of their probation period. Completed evaluations are returned to the FAS Human Resources / Personnel Office for processing.

Note pertaining to USPS and A&P employees: The University no longer accepts evaluations after the deadline. It is important that the employee's supervisor complete and submit the evaluation at least three days prior to the deadline. This allows the office time to get the Chair's signature and takes into consideration the time for mail delivery via campus mail. New employees will receive an "average" rating for their 6-month performance appraisal if the evaluation is not submitted prior to the deadline. Employees completing a regular annual evaluation will receive the previous year's rating if the paperwork is not submitted on time.

### Leave:

Annual and sick leave is accrued for all faculty, A&P, and USPS employees on a biweekly basis and is credited to the employee the last day of the pay period. Leave must be accrued before it is taken. There is no waiting period for using annual leave. USPS and A&P employees may use it during their probationary period. Leave slips must be submitted for time taken off work. The supervisor must approve requests for annual leave in advance, and leave slips for sick leave must be submitted to the supervisor immediately upon return to work. Approved leave slips can be submitted to this office as soon as they are approved but must be turned in before timecards are due for that pay period.

Employees who do not have timecards (faculty and A&P) need to adhere to the same policies and should submit the leave slips by the timecard deadline for entry.

### Hires / Reappointments:

This office processes all paperwork for new hires and reappointments for College Work Study, Student Assistant, Graduate Assistants, OPS, USPS, A&P, and faculty. Sign-up paperwork must be completed and submitted to the office prior to an employee's start date. The employee should bring his / her Driver's License and Social Security card on the day he / she completes the paperwork. Allow 3 -4 weeks for the appointment process to be completed and for the employee to receive the first paycheck.

W-4 cards are available for address or deduction changes.

### Benefits / Orientation:

2 New faculty, A&P, and USPS employees need to contact the University Benefits Office  
3 at (352) 392-1225 or via email at [benefits@ufl.edu](mailto:benefits@ufl.edu) to pick up a benefits package and to  
4 select an insurance plan. This would include all state (permanent) and grant funded  
5 (time-limited) employees. The Department's Administrative Assistant can assist you with  
6 arranging a meeting.  
7

#### 8 **Identification Cards – UF ID:**

9 Please inform the Administrative Assistant if a new hire requires a UF Staff ID card.  
10 *(This applies to faculty, A&P, and USPS status employees only. Students will need to*  
11 *purchase a student I.D. from personal funds.)* The Administrative Assistant will process  
12 the required forms at the time the initial new hire paperwork is completed. Once the  
13 funds are encumbered, a copy of the paperwork will be provided to the employee so that  
14 he / she can go to the UF HUB ID Office (with his / her driver's license and Social  
15 Security card) to have a photo ID made.  
16

#### 17 **Keys:**

18 The supervisor should make a note on the new hire paperwork if a new employee needs  
19 access to Departmental offices or labs, including the building and room number. Please  
20 note that USPS, Graduate Assistants, and OPS employees will not be allowed to have a  
21 master key without prior permission from the Chairman. Most office and lab keys open  
22 the outside gate and the outside doors to the building. The employee is encouraged to  
23 check this to ensure that they can gain access during non-business hours.  
24

25 All outside doors are to be locked after 5:00 PM on weekdays and during all hours on  
26 the weekends.  
27

#### 28 **Payroll:**

29 Timecards are submitted to personnel for the following positions: College Work Study,  
30 Student Assistants, OPS, and some USPS (excludes salaried positions such as  
31 Biological Scientists). Timecards are due by noon the Wednesday before the pay period  
32 ending date printed on the timecard. Late timecards will be certified the **following** pay  
33 period. ***This means a missed paycheck!*** All timecards must have the employee and  
34 supervisor's signature. Employees are responsible for completing their timecards  
35 correctly and obtaining their supervisor's signature. If hours must be projected in  
36 advance to meet the deadline, then the employee should keep a copy of the timecard.  
37 Use the copy to make any adjustments to the hours worked for the next payroll  
38 certification. The next paycheck will reflect the adjustments.  
39

40 **Please note that the faculty should designate a staff member who can sign the**  
41 **timecards in his / her absence.**  
42

43 **If an employee is unavailable or absent from work, then the supervisor will need to**  
44 **make a note in the employee's signature field stating "employee unavailable to**  
45 **sign" for our records in case an employee challenges the hours paid. It is not the**  
46 **Department's administrative staff's responsibility to make this determination.**  
47

48 There are early deadlines when the pay periods are near a state holiday. You will  
49 receive notices in advance when this occurs.  
50

#### 51 **Paychecks:**

2 University personnel are paid biweekly. Paychecks are either distributed by the  
3 supervisor or placed into the employee's mailbox. Paychecks are sent on payday  
4 (Friday) to employees located off campus. *Direct deposit is now required for state*  
5 *employees.* Forms are available in the Department's Personnel Office.  
6

#### 7 **Termination of Employment:**

8 Supervisors must complete the "Reappointment Notices" and the "Employee Exit  
9 Checklist" (forms available in this office) PRIOR to the termination date. One of the  
10 forms requires the employee's signature. The employee must return all Department  
11 keys and purchasing cards at this time.  
12

#### 13 **Work-related Accidents and Workers' Compensation:**

14 If an employee has a work related injury, either minor or a major emergency, then they  
15 must follow the UF Workers' Compensation procedures. Treatment must be received  
16 from the student infirmary, emergency care facilities, or emergency room. Employees  
17 should not go to their personal physician because treatment may not be covered by  
18 Worker's Comp. A First Notice of Injury Report must be filed by calling UF's Workers'  
19 Compensation Office at (352) 392-4940 as soon as possible. Notify your supervisor and  
20 the Department's Human Resources / Personnel Office immediately at 392-9617 ext.  
21 222.  
22

#### 23 **Faculty Assignments & Cost Sharing Reports:**

24 This office is responsible for preparing and submitting the Faculty Assignment Reports  
25 each semester. The faculty will be notified in writing when the deadline is near. The  
26 percentage of effort is reported for the following areas: teaching, research, federal  
27 research, and extension activities. This report also needs to include the faculty  
28 member's account numbers that require cost sharing. This information is used in other  
29 reports that the Chair's Office is required to submit. It is very important that the  
30 information is accurate and complete.  
31

#### 32 **Faculty Appointments (Courtesy, Affiliate, Joint, etc.)**

33 The information below is taken from the Department's "Policies and Procedures for  
34 Affiliate Faculty Appointments." The complete document is available in the Department's  
35 Personnel Office for review. Additional information that is included in the "full" document  
36 are the guiding principles, definitions of the various academic titles and modifiers, and  
37 the rights and responsibilities for each title. It is advised that the sponsor familiarize him  
38 or herself with this information.  
39

#### 40 *Appointment Procedures:*

41 **Research** and **Visiting** appointments require the action of a formal search and screen  
42 committee, including advertisements, solicitations, and interviews. As such, prior review by  
43 the Affiliated Faculty Committee would be superfluous and contrary to the intent of the  
44 affirmative action requirements. Faculty members wanting to create such a position with  
45 extramural funds to nominate a colleague for these types of appointment must justify it  
46 directly to the Department Chairman, and ask that a search and screen committee be  
47 convened. Normally, the initiating faculty member would serve as the committee chair.  
48 That search and screen committee would be charged with essentially the same function as  
49 the Department's Affiliate Faculty Committee, to ensure that an explicit and mutually  
50 beneficial relationship is established with someone seeking an affiliation with this  
51 Department. As with the other types of appointments, the recommendation of the search  
52 and screen committee would be subject to a vote of the faculty.

2  
3 **Joint, Affiliated, and Courtesy** appointments require a nominating letter or memo from the  
4 sponsor to the Department's Affiliated Faculty Committee, along with the nominee's  
5 curriculum vitae. An effective nominating letter should do the following:

- 6  
7 ➤ Name the person and the specific title being requested.  
8 ➤ Highlight the academic qualifications of that individual.  
9 ➤ Explain the relationship between the nominee and the sponsor, i.e., how well known.  
10 ➤ *Explicitly* state how the nominee will participate in the Department, and when.  
11 ➤ Clarify any departmental resources to be committed to that person, once appointed.

12  
13 The Affiliated Faculty Committee will meet to review all nominations, and may take one of  
14 three actions by a majority vote:

15  
16 (1) Return the nominating packet to the sponsor with guidance for how to strengthen the  
17 nomination.

18  
19 (2) Move the nomination forward to a vote of the eligible faculty, with a Committee  
20 recommendation of approval.

21  
22 (3) Move the nomination forward to a vote of the eligible faculty, with a Committee  
23 Recommendation of denial.

24  
25 If, in the Chair's judgment, action (1) would be the likely outcome of a Committee vote  
26 based on a particular packet, the Chair may ask the sponsor to participate in the  
27 Committee meeting to clarify mutual benefits or to address any questions. The sponsor  
28 would not normally have a vote, unless already appointed to that committee.

29  
30 If actions (2) or (3) are taken by the Committee, the Committee Chair will make the  
31 appropriate motion at the next faculty meeting. Two-thirds of the Department's eligible  
32 faculty must vote "yes" to accept the committee's recommendation (written proxies are  
33 acceptable). The Department Chairman will communicate the results to the nominee and,  
34 as appropriate, make the formal appointments with the University.

### 35 36 **Graduate Faculty Appointments**

37 People with Courtesy, Affiliate, Joint, or regular line faculty appointments can apply for  
38 graduate faculty appointments within our Department. Those who want to serve on  
39 graduate student committees will need this appointment in our Department. This  
40 process will generally automatically begin for those who are regular line faculty. It's  
41 important for new faculty to follow up with the Department's Human Resource contact to  
42 ensure that he / she has a current CV on file for the voters to view. All other  
43 appointments require a nominating letter or memo from a sponsor (line faculty) in the  
44 Department along with the nominee's curriculum vitae. Ballots are distributed to all faculty  
45 with a graduate faculty appointment in the Department for a vote. A 2/3 majority  
46 approval is required. If the appointment is approved, then the Department's Human  
47 Resource / Personnel Office will process the paperwork. The paperwork will need to be  
48 approved and signed by the IFAS Dean and the Dean of Graduate School. A letter is  
49 mailed directly to the candidate from the Graduate School once the process is complete.  
50 It's at this time that the person can serve on graduate student committees.  
51

2  
3

2  
3  
4

## BUDGETING AND ACCOUNTING OFFICE

5

### BUDGET DEVELOPMENT & ALLOCATION

6

|    |               |   |
|----|---------------|---|
| 7  | Location:     | Building 1232, Room 7   |
| 8  | Note:         | The Department's Office Manager supervises both the Senior Fiscal Asst, and |
| 9  |               | Fiscal Assistant. This person manages all Department budgets, contracts &   |
| 10 |               | grants, overhead accounts, and foundation accounts.                         |
| 11 | Contact:      | Nancy Gibbs, Office Manager   |
| 12 | Phone:        | 392-9617 ext. 223   |
| 13 | Email:        | <a href="mailto:nsg@gnv.ifas.ufl.edu">nsg@gnv.ifas.ufl.edu</a>              |
| 14 | Office Hours: | Monday – Friday from 8:00 AM – 5:00 PM                                      |

15

16

#### **Allocation of State Funds, Account Numbers, and Faculty Codes:**

17 Each fiscal year, which is from July 1 to June 30, the Chair allocates state funds, based  
18 on a budget disseminated by the UF / IFAS Deans. The Office Manager will set up the  
19 accounts for all faculty, both state and contracts / grants. Please note that the contract &  
20 grant accounts may have their own beginning and ending date that varies from the  
21 State's fiscal year. At the beginning of each fiscal year or contract & grant, the faculty  
22 will be provided with the following:

- 23
- 24 1. A Faculty Code number (new faculty only), which remains with them throughout their  
25 tenure in the Department. These codes are needed to complete most forms and  
26 applications.
  - 27 2. The amounts budgeted for the various categories:  
28 **OE** (Operating Expense)  
29 **OCO** (Other Capital Outlay – equipment above \$1,000)  
30 **OPS** (Other Personnel Services – temporary employees)  
31 **Salary**
- 32

33 **IMPORTANT NOTE: Each individual needs to know his / her account numbers and**  
34 **faculty code.**

35

#### **Problems with Accounts:**

36 Anyone who has a question or a problem with an account should contact the Office  
37 Manager.  
38

39

#### **Contracts / Grants and CRIS Projects:**

40 Contracts / Grants: Through their own initiative, faculty generate grant proposals. This  
41 office can assist the Principal Investigators (PI) with issues during grant preparation.  
42

43  
44 If the grant is awarded, the Office Manager receives notification by UF / IFAS Division of  
45 Sponsored Research and sets up the account for the faculty member who is the  
46 Principal Investigator on the grant. The Office Manager then notifies the PI so that a  
47 meeting can be scheduled to discuss the allocation of funds in his / her account.  
48

49 CRIS Projects: The Department and IFAS combine research projects under umbrella  
50 research plans known as CRIS (Current Research Information System) projects, which

2 serves as the Land-Grant accountability system for all research. Grant proposals should  
3 be tied to one of three programmatic CRIS projects\* by title and number. Grants for  
4 USDA require their own CRIS numbers.

5  
6 The forms for these projects are available for download on the web at  
7 <http://research.ifas.ufl.edu/projects/>.

8  
9 The Administrative Assistant can help the faculty with the checklist of requirements for  
10 establishing a CRIS project. Please remember that USDA grants require CRIS projects.  
11 The Department has also already established the three programmatic CRIS projects  
12 (listed below) so that faculty can relate one of their grants to a programmatic CRIS  
13 project. The amount of new CRIS projects generated should be minimal. Before taking  
14 grant proposals / CRIS projects to the Chair for signature, please submit the forms to the  
15 Administrative Assistant to identify errors or omissions. Please confer with Department  
16 Chair if you have questions on how your research appropriates in CRIS.

17  
18 The Office Manager is responsible for the fiscal accountability, tracking, and reporting of  
19 approved CRIS projects to UF / IFAS.

20  
21 \*The three programmatic CRIS projects are:

22 Freshwater: FAS 03953 – “Fisheries, Aquatic Ecology and Limnology of  
23 Florida’s Freshwater Ecosystems”

24 Coastal: FAS 03978 – “Management and Ecology of Florida’s Coastal Marine  
25 Ecosystems”

26 Aquaculture: FAS 04007 – The Science of Aquaculture: the biology, husbandry  
27 and utilization of aquatic organisms

#### 28 29 **Manuscripts:**

30 All FAS faculty, staff, and student publications need to acknowledge the Florida  
31 Agricultural Experiment Stations (FAES), using an assigned publication number. The  
32 FAES publication number and requests for journal page charges and reprints are  
33 obtained by completing a manuscript transmittal form that is available on-line at  
34 <http://research.ifas.ufl.edu/JournalSeries/>. A copy of the manuscript and transmittal form  
35 should be sent to IFAS where it is assigned an FAES publication number. All  
36 manuscript transmittal forms must list a CRIS project number.

37  
38 An FAES publication number is needed to obtain Journal Series funds for page charges  
39 and reprints.

40  
41 The Department address is used as the address of the Department author; if  
42 appropriate, a current address may be footnoted.

#### 43 44 **Budgets:**

45 The Office Manager assists the Chair in drafting all state Departmental budget requests  
46 and reports in Instruction, Teaching, and Extension.

#### 47 48 **UF Foundation – SHARE:**

49 If a faculty member receives a private donation, then he / she should contact the Office  
50 Manager. This person will process the required documents to set up or deposit the  
51 funds into a UF Foundation – SHARE account. Faculty cannot use non-UF accounts for  
52 private contributions.

2  
3 Some private contributions are processed as sponsored programs rather than gifts or  
4 donations. Check with the Chair if there is a question.  
5

6 **Fringe Calculations:**

7 Due to the volume of questions the faculty have raised regarding the cost of fringe, we  
8 decided to publish that information within this handbook for future reference. Please use  
9 the following information when calculating the fringe costs for your employees.  
10 (Typically needed when preparing the budget page of your grant proposals.)  
11

12 Student OPS Employees:

13 Covered by Workers' Compensation.

14 Charges of **0.65%** will be assessed to the Operating Expense category at regular  
15 intervals by Contracts and Grants.  
16

17 OPS (not student appointments):

18 Required benefits include Social Security, Workers' Comp, and Unemployment  
19 Compensation.

20 Employer's cost: **8.3%** (will be assessed to the OPS category)  
21

22 USPS, A&P, and Faculty:

23 Benefits include: retirement, social security, workers' compensation, unemployment  
24 compensation, and health insurance coverage.

25 Employer's cost: **19% + \$4,699.20** (will be assessed to the Salary category)  
26

27 NOTE REGARDING EMPLOYER'S COST: This is an estimated percentage for  
28 fringe and dollar amount for insurance that was received from IFAS' Planning &  
29 Budgeting. The insurance cost (\$4,699.20) is an approximation so please keep  
30 in mind that it may vary from the actual payroll due to family vs. individual  
31 coverage.

32 Graduate Assistants:

33 Covered by Workers' Compensation.

34 Charges of **0.65%** will be assessed to the OE category at regular intervals.

35 *Tuition waivers* are currently (FY 01-02) charged on state and contract and grant  
36 accounts at **\$45 per pay period** for both out-of-state and in-state students. This amount  
37 will vary from fiscal year to fiscal year and is decided upon by IFAS.

2

### 3 PURCHASE ORDERS AND FISCAL PROCESSING

4

|    |               |   |
|----|---------------|---|
| 5  | Location:     | Bldg. 1232, Room 7  |
| 6  | Note:         | The Department's Fiscal Assistant provides assistance to faculty and staff in the |
| 7  |               | purchase and delivery of all goods and services and the fiscal management of      |
| 8  |               | Department accounts.  |
| 9  | Contact:      | Mike Stanley, Fiscal Assistant  |
| 10 | Phone:        | 392-9617 ext. 259   |
| 11 | Email:        | <a href="mailto:mds@ufl.edu">mds@ufl.edu</a>                                      |
| 12 | Office Hours: | Monday – Friday from 8:00 AM – 5:00 PM  |

13

#### 14 Steps in the Purchasing Procedure:

15 1. Before you purchase, set up proper purchase orders through the Fiscal Office.

16

- 17 a. **Purchasing more than one item from the same vendor over time.** Using
- 18 the appropriate assigned faculty codes and account numbers, each fiscal
- 19 year the faculty may set up a “blanket” (purchase order) with the vendor
- 20 through the Fiscal Office. Blankets are used when the faculty intend to
- 21 purchase several items from a vendor during the fiscal year. Complete the
- 22 appropriate green request form and place it in the Fiscal Assistant's mailbox
- 23 for processing. Please remember to include the vendors' addresses phone
- 24 numbers, and Federal I.D. numbers. The blanket PO number will be
- 25 provided to the faculty once the blanket has been encumbered. Allow at least
- 26 five business days for processing.

27

28 *Note: Remember that a new PO # is issued at the beginning of each fiscal*

29 *year for state accounts if a blanket is extended. Be sure to use this new*

30 *number when placing orders. This does not apply to grant accounts that*

31 *have a different beginning and ending date.*

32

- 33 b. **OCO purchases (items over \$1,000).** Faculty will need to complete the
- 34 green form located in the mailroom to request a purchase order. The faculty
- 35 code and account number must be included on the form. Complete the
- 36 appropriate request form and submit it to the Fiscal Assistant for processing.
- 37 Allow at least 5 business days for processing.

38

39 The University requires the departments to purchase equipment from the

40 vendors that provide contract prices. These items are listed on the UF's

41 Purchasing Office website at:

42

42 [http://www.purchasing.ufl.edu/main\\_contracts.asp](http://www.purchasing.ufl.edu/main_contracts.asp)

43

44 Please note that quotes are required for the following dollar amounts. *You*

45 *can attach the additional quotes to the green form.*

46

- 46 • \$1,000 - \$5,000 requires one written quote from another vendor.

47

- 47 (Two quotes total.)
- 48 • \$5,000 - \$25,000 requires two quotes from other vendors. (Three

49

- 49 quotes total.)

- Over \$25,000 requires a bid that is completed through the UF's Purchasing Office unless a Sole Source document can be submitted for the item.

c. **One time purchases under \$1,000.** The University has delegated certain employees to purchase items with the UF Purchasing Card, which acts like a credit card. An individual who has authority to hold this card in the Department may order supplies with it. All purchases require prior approval from the PI. Submit the invoice (signed by purchaser), and a blue form to the Fiscal Office for reconciling and approval. Additional information regarding this process is included in this Handbook in the section entitled "Purchasing Card and Travel".

d. **On campus vendor purchases.** "ID Requisitions" are used for purchases from on-campus vendors, such as the HUB (UF Bookstore). These are used as blankets or for one-time purchases. Complete a green form and return it to the Fiscal Assistant for processing.

e. **Reimbursements:** Yellow forms are available in the mailroom for Department employees to request reimbursements. Only on an emergency basis, should an employee purchase items out-of-pocket as opposed to submitting a request for a PO. Submit the original receipt, statement of justification for not requesting a PO, and the signature of the PI to the Fiscal Assistant for processing.

2. Remember to include the following for all requests (above):
  - a. Use correct account number and faculty code. Check the account balance BEFORE requesting an order to ensure that sufficient funds are available in the OE or OCO category. You cannot "borrow" funds from another account. Also check the expiration date on your accounts.
  - b. Complete all request forms completely. Name, addresses, phone numbers, and Federal ID numbers of the vendor are important. Also, provide complete information regarding the item being order (i.e., item number, description, quantity, and price). Incomplete information will cause a delay in the order.
  - c. Provide proper signatures. Faculty sign for their own accounts.
3. After the merchandise is received, please initial and date the packing slip and submit it to the Fiscal Office. This is needed to document receipt of goods before payment to the vendor.
4. Forward all invoices to the Fiscal Office immediately. By State law, vendors must be paid within 5 days to avoid a late penalty. The Fiscal Office will process the invoices for payment.
5. Allow approximately 30 days for payment. The Department does not pay a vendor directly. All requests go through IFAS and then to Tallahassee for approval before payment is made.

#### **How you can help this office help you:**

1. Provide the correct account number and faculty code for all purchase requests.

- 2 2. Check your account balances prior to requesting a purchase order (or hiring new  
3 employees).
- 4 3. Submit all packing slips and invoices promptly.
- 5 4. Submit all requests for budget transfers in writing.
- 6 5. Be patient. The Fiscal Office will process all requests as quickly as possible.
- 7 6. Please note that it is the responsibility of the PI to follow the Cost Accounting  
8 requirements for Federal Grants. The Department Chair may not approve future  
9 grant proposals if repeated violations occur.
- 10 7. It is the responsibility of the PI to monitor the charges on his / her accounts. This can  
11 be delegated to another person, such as a Biological Scientist. This information is  
12 available for review through NERDC.

13  
14 **NERDC (system used to view account balances):**

- 15 1. New faculty need to inform the Department Office Manager of security access needs.  
16 The appropriate security access will be requested for NERDC at that time.
- 17 2. The Department Fiscal Office can provide one-on-one training for how to use the  
18 University's computer system to view grant balances.

2  
3  
4 **PURCHASING CARD & TRAVEL**  
5

|    |               |  |
|----|---------------|--|
| 6  | Location:     | Building 1232, Room 4  |
| 7  | Note:         | This office maintains department records for all purchasing card transactions and      |
| 8  |               | reconciles all charges. Also, all travel requests and reimbursements are               |
| 9  |               | processed here.  |
| 10 | Contact:      | Jennifer Hermelbracht  |
| 11 | Phone:        | 392-9617 ext. 221  |
| 12 | Email:        | <a href="mailto:jlhermelbracht@mail.ifas.ufl.edu">jlhermelbracht@mail.ifas.ufl.edu</a> |
| 13 | Office Hours: | Monday – Friday from 8:00 AM – 5:00 PM   |

14  
15 **Purchasing Card Transactions:**

16 Purchasing cards are used for one-time purchases under \$1,000. The University has  
17 delegated certain employees to purchase items with the UF Purchasing Card, which acts  
18 like a credit card. An individual who has authority to hold this card in the Department  
19 may order supplies with it. All purchases require prior approval from the PI. You can  
20 use this card like any personal credit card for purchases.

21 There are items that may **not** be purchased via the purchasing card. Examples of these  
22 items include: gasoline, household moving expenses (except for labs and / or office),  
23 money (cash advances, ATMs), gift certificates, clothing, contractual services,  
24 maintenance agreements (unless a PO has been established in advance), telephones or  
25 devices connected to a UF telephone line (exceptions: fax machines & modems),  
26 furniture (no chairs, love seats) (exceptions: file cabinets, bookshelves, small items  
27 under \$1,000), personal convenience or decorative items (lamps, heaters, air  
28 conditioners, fans, plaques, picture frames, etc.), rent or leases, OPS, OCO items,  
29 alcohol (non-lab), cash credits, food (exception: unless specific exception is on file with  
30 Disbursement Services before the purchase occurs), liquor, wire transfers, car rentals  
31 other than Avis, any items prohibited by law, regulations, or policy, and travel purchases  
32 in excess of \$2,000 per purchase.

33 After the merchandise is received, please sign and date the invoice. This should be  
34 attached to the blue form (available in the copy room) and submitted to this office. The  
35 account number, faculty code, and purchaser's name are required on the blue form.  
36 Remember all invoices must be submitted immediately. Our office cannot approve  
37 charges without the documentation.  
38

39 **NOTE REGARDING LOST INVOICES:** Please see the Sr. Fiscal Asst. to complete a  
40 "Replacement Receipt Form", which is required by UF before reconciliation and approval  
41 of charges.  
42

43 **Travel:**

44 Steps to follow before your trip:

- 45  
46 1. Make sure the money is encumbered on the faculty member's account prior  
47 to making travel arrangements (i.e., paying for registration charges, arranging  
48 for hotel reservations, and making airline reservations). If funds are not

2 encumbered, then a Travel Authorization Request (TAR) will need to be  
3 generated to set the money aside for the trip. Complete the inter-  
4 departmental (purple) form to generate a TAR. **Funds must first be**  
5 **encumbered.**

- 6 ○ A “special TAR” is used for one individual for one trip. It must be used  
7 for conference / convention travel, foreign travel, and travel advances.
- 8 ○ A “blanket TAR” may be used for one individual for multiple trips.
- 9 ○ A “memo TAR” may be used for multiple individuals for multiple trips.  
10 It may be established for a conference / convention if two or more  
11 employees from the same department and using the same account  
12 number are attending the same conference. The names and social  
13 security numbers of all persons authorized to travel on the memo  
14 must be submitted with the memo TAR.

15 PLEASE NOTE THAT THE DEPARTMENT GENERALLY SETS UP A  
16 MEMO TAR PER ACCOUNT NUMBER FOR RESEARCH FACULTY &  
17 STUDENT FIELD TRIPS.  
18

## 19 2. Transportation

- 20 ○ Airfare: You must use a University Preferred Travel Agent when  
21 making flight reservations. A list of agencies is available at the  
22 following website <http://admin.ufl.edu/ddd/dd98-99/98dd032a.htm>.  
23 After making reservations, request to have the itinerary faxed to you.  
24 Keep this in a safe place. A copy of this should be submitted with  
25 your receipts for reimbursement. The airfare can be paid by the  
26 Department and charged directly to the TAR. The preferred travel  
27 agency will need the TAR number, which can be obtained through this  
28 office.
- 29 ○ Car rental: Avis has the *University contract* for car rentals. (**phone #**  
30 **1-800-338-8211**) University employees must use Avis. Justification  
31 must be provided for a car size other than a “compact” car.
  - 32 ▪ Contact this office for an Avis Company Travel Order (ACTO)  
33 to avoid out of pocket expenses. The ACTO is presented to  
34 the rental agent at the time of pick up.
  - 35 ▪ You also have the option of using your p-card for Avis rental  
36 cars.
  - 37 ▪ If you require reimbursement for out-of-pocket expenses, then  
38 you must obtain a receipt, which indicates the charges, and  
39 submit it with your reimbursement request.
  - 40 ▪ *Another great benefit for State employees*: A statewide  
41 contract with Avis allows discounted car rentals for all State  
42 employees, even for non-work related activities. Proof of  
43 employment with the State, such as a UF ID, is required.
- 44 ○ Mileage (personal vehicle): Mileage is paid at \$0.29 per mile. There  
45 is no additional reimbursement related to the operation or  
46 maintenance of the vehicle when claiming mileage.
- 47 ○ State vehicle: State vehicles may be used for business travel. They  
48 have gas cards and SunPass transponders (for tolls) to avoid out of  
49 pocket expenses.  
50

51 *Please note that your UF Purchasing Card can be used to pay for your airfare,*  
52 *car rental, and hotel. The Travel Authorization Request must be processed*

2 *before you charge any travel expenses to your credit card because this TAR # is*  
3 *used to approve payment to the vendors. As previously noted, it is State law that*  
4 *vendors be paid within 5 days to avoid penalty.*

5  
6 3. Meals and Lodging Options (domestic travel)

- 7 ○ You may request to be reimbursed at the per diem rate of \$50  
8 each day based on your departure and return times. Per Diem  
9 includes food and lodging. You must have an overnight stay to  
10 claim the per diem rate.
- 11 ○ You may request to be reimbursed for your actual expenses.  
12 Receipts for all expenditures except meals must be obtained  
13 during your trip and submitted with your request for  
14 reimbursement. You are only allowed a meal allowance of \$21  
15 per day (\$3 breakfast, \$6 lunch, \$12 dinner). No receipts are  
16 necessary to receive the meal allowance. The cost of a banquet  
17 may be reimbursed if it is “an organized banquet with a speaker”.  
18 You must have a receipt and verification (i.e., the program) that  
19 states it was an organized banquet with a speaker. This often is  
20 included in the registration fee and not reimbursed separately.  
21 Banquets generally include dinner also so this meal would not be  
22 reimbursable. Again, you must include a program, brochure, or  
23 website for verification for our fiscal staff.
- 24 ○ A traveler can only claim mileage for one-day travel with no  
25 overnight stay.

26  
27 4. Conferences, Conventions, Workshops, etc.

- 28 ○ When requesting reimbursement for out-of-pocket registration expenses,  
29 an agenda and receipt or confirmation notice (email is fine) must be  
30 submitted with your reimbursement request.
- 31 ○ Ways to avoid out-of-pocket expenses:
  - 32 ▪ Registration can also be paid in advance via a Registration  
33 Payment Request form. Allow three weeks for processing.
  - 34 ▪ Registration can be paid using your UF purchasing card  
35 (Visa). Provide the Department Travel Office with a copy of  
36 your registration form as soon as you have submitted your  
37 reservation.
- 38 ○ Reimbursement is not allowed for socials, tours, picnics, etc. associated  
39 with the conference. Banquets are reimbursed only if you have a receipt  
40 and verification that it was an “organized banquet with a speaker.”

41  
42 **Remember to obtain and keep all receipts to submit with your reimbursement request.**  
43 **Missing receipts will delay your reimbursement.**

44  
45 5. After your travel (within 10 days upon your return)

- 46 ○ Submit a Travel Reimbursement Request (pink form) to the  
47 Department’s Travel Office. Include all receipts associated with your  
48 trip (i.e., registration, airline ticket stub, car rental, taxi, tolls).
- 49 ○ Remember, meals are the exception. You will be reimbursed at a  
50 meal allowance of \$21 per day. Reimbursement for the day may vary  
51 depending upon your departure and arrival times.

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## 6. International Travel

- Complete your TAR request (to encumber funds) at least 30 days in advance of your departure date. International travel is processed manually and requires additional signatures for approval.
- The Travel Office can provide you with the daily per diem amount for your destination country to use when estimating the cost of your trip for the TAR. However, you must keep all receipts for reimbursement purposes. You are reimbursed your actual expenses only. The per diem rate cannot be used for your reimbursement voucher.

2 **CLINICAL BILLING**

3  
4 Location: Building 1232, Room 7  
5 Note: This office administers billing, processes the payments, and maintains the  
6 records for all of the vet accounts that are set up for the veterinary duties  
7 performed in the two diagnostic labs.  
8 Contact: Nancy Gibbs  
9 Phone: 392-9617 ext. 223  
10 Email: [nsg@gnv.ifas.ufl.edu](mailto:nsg@gnv.ifas.ufl.edu)  
11 Office Hours: Monday – Friday from 8:00 AM – 5:00 PM

12  
13 The Fish Diagnostic Labs are located in Gainesville and Ruskin.

14  
15 **All paperwork for billing and payment must be sent to the Office Manager for processing.**

2 **DEPARTMENTAL VEHICLE USE**

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4 Employees have the option of using State or personal vehicles for fieldwork or official business  
5 trips. In fact, use of state vehicles is strongly encouraged whenever possible. It is preferred  
6 that an employee use a vehicle that is assigned to his / her supervisor. If one is not available,  
7 then a vehicle within the Department motor pool may be used. The keys and sign-out sheets for  
8 the Departmental vehicles are located in the receptionist area. A vehicle belonging to another  
9 faculty member may be borrowed by contacting that person directly.

10  
11 As a general rule, employees should check the tires and fluids before taking any long distance  
12 trips and vehicles should be returned refueled and clean. **Be sure to return the keys when**  
13 **you return the vehicle.** If after hours, then the keys should be returned the following business  
14 morning.

15  
16 Located inside each vehicle are log forms, which must be completed for each trip. Please note  
17 that it is very important that the *account number and faculty code to be billed is included on this*  
18 *form.* The employee can get these numbers from his / her supervisor beforehand.

19  
20 Inside each vehicle is also a gas card that is accepted at most gas stations. You can use these  
21 at the pumps. If asked for a Driver I.D. number, then use the last 4 digits of the vehicle tag #. If  
22 a card reader does not exist at the pump or if you encounter problems, then the clerk inside the  
23 store can enter the card number manually. All receipts need to be saved and kept with the  
24 vehicle log. The Office Manager should be contacted immediately if the card is lost or stolen!

25  
26 The vehicle logs are due by the end of the first week of each month. They should be placed in  
27 the Fiscal Assistant's mailbox. The invoices will be provided to the faculty by the end of the  
28 month.

29  
30 Maintenance problems should be reported to Larry Tolbert or the faculty member responsible  
31 for that vehicle. It is best to contact Larry via his cell phone at 317-3263.

2 **MAINTENANCE REQUESTS**

3

4 For maintenance requests you will need to complete an “In House Work Request” form. They  
5 are located in our mailroom with the other internal office forms. Please remember to include the  
6 account number to be charged. You should contact your immediate supervisor who will help  
7 you determine what account to charge. Place the completed forms in Larry Tolbert’s mailbox  
8 and he will complete the work by priority.

9

10 If you have an emergency (i.e. pipe breaks), then you can contact Larry on his cellular phone at  
11 317-3263.

12

2 **DEPARTMENT EQUIPMENT (i.e., computer projector)**

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Faculty and graduate students can check out the computer projector from the Fiscal Office located room 7. The equipment resides in this office and is easily transportable. The sign out log is located in this office as well. Either the Office Manager or Senior Fiscal Assistant can assist you.

## ACRONYMS AND DEFINITIONS

A&P: acronym used for personnel who are classified as Administrative and Professional.

CRIS: Current Research Information System. Faculty create project statements, research goals, and objectives for their grants. This is generally considered as a part of the Florida Agricultural Experiment Station Project or sometimes referred to as CRIS.

FAES: Florida Agricultural Experiment Station.

NERDC: Northeast Regional Data Center. They are located in the Bryant Space Sciences Research Building (SSRB) at the University of Florida. They provide computing services for the University of Florida, University of North Florida, and for other state educational institutions and agencies in northern Florida.

OCO: Operating Capital Outlay. As defined in the *University of Florida's Handbook on Business Policies and Procedures*: "Equipment, fixtures, and other tangible personal property of a non-consumable and non-expendable nature, the value or cost of which is \$1,000 or more, and the normal expected life of which is one year or more; and materials that are circulated to students or the general public; and hardback-covered bound books, the value or cost of which is \$100 or more."

OE: Operating Expense. Budget category used for purchases and expenses that are under \$1,000 (i.e. lab supplies, travel reimbursements, equipment).

OPS: Other Personal Services. These personnel positions do not require the employer to follow the same advertisement and hiring procedures as USPS, A&P, or faculty. In fact advertisement is not required. Employees with this classification do not receive insurance or leave benefits.

USPS: University Support Personnel System. This classification is used for personnel who are either on a hourly or salary pay scale and can either work full or part time. Examples of such employees are clerical or administrative support positions (i.e. senior clerk, secretary, office manager, administrative assistants) and lab technicians.

SHARE: Special Help for Agricultural Research and Education. This program is the fundraiser for UF / IFAS.

SUNCOM: SUNCOM is the state long distance system for calls within the US, Puerto Rico, Virgin Islands and Canada.