CECAS FACULTY RESOURCE GUIDE

CECAS Business Office

08/15/2024

Table of Contents

PROCUREMENT GUIDELINES

BUSINESS MEALS

What qualifies?

Travel Meal Reimbursement Guidelines

Business Meals are normally reimbursed at the appropriate GSA rates.

Business Meals are not allowable on P-Cards

Fund 14

- Must follow state guidelines
- Meals are allowable at per diem for visitors, job candidates, and students but not for employees

Fund 18

- Please consult with your Financial Business Manager prior to using a Fund 18 Project for Business Meals.
- Travelers utilizing State Funds (10 & 18) are required to use the State of SC per diem rates. In-State Maximum per diem is $35 per day, out of state maximum is $50 per day. Domestic travel is any trip that is within the 48 contiguous United State, Alaska, Hawaii, Puerto Rico and Canada. International travel is any trip that is outside the 48 contiguous Unites States, Alaska, Hawaii and Puerto Rico.

Fund 20

- Meals unallowable unless proposed as integral part of project. If you are unsure if a meal is allowable, reach out to your post awards contact.

Fund 22/23

- Must follow state guidelines
- No food/alcohol

Fund 55/57

- Business meals/alcohol are allowed for employees and can be reimbursed over per diem

Business meals to be paid for with Foundation funds are fully reimbursable for both the employee and official visitor meals if the business purpose of the meal is documented properly (Who? What? When? Why? Where? And How Many?). The correct account code for Business Meals & Entertainment is 7341.

No employee meals should ever be paid for with state, federal or CU gift funds (fund 10, 11, 15, 17, 21, 22 or 23) unless reimbursing travel expenses to an employee at per diem rates.

Non-Overnight meals while in travel status are not reimbursable.

Entering a Business Meal in Concur:

Please follow these directions for entering a business meal reimbursement in Concur. Make sure to add in a list of Attendees.

P-CARD PURCHASING

Please review Clemson's Purchasing Card (P-Card) Procedures

1. P-Card Deadlines
    a. P-Cardholders must review and submit prior month reports by the Procurement Services deadline of the 1st Friday of the following month. During the time of fiscal year close and holidays this deadline may be accelerated.
        i. If reports are not submitted on time, your P-Card privilege may be revoked or suspended.
2. Cardholder Responsibilities for Monthly Report
    a. Upload a detailed receipt (showing ship to/bill to address, date, total including tax/no tax, item(s) purchased).
        i. Add Comments: Detailed description of what was purchased & why (if not immediately obvious and/or if the purchase could be interpreted as personal in nature).
3. Allowable / Non-Allowable Charges
    a. All charges must follow guidelines of the funding source
    b. Please see below for a list of allowable and non-allowable items to charge to a p-card:

ALLOWABLE	NON-ALLOWABLE
Student Travel-see Student Travel Guidelines.**Student group travel expenses (excluding Home Sharing, ex: VRBO) may be paid in full with the CU VISA including those of the employee chaperones. These expenses should be coded to 6030. Athletics would use separate account # for travel.	Employee Travel with the exception of airline, train tickets, baggage fees, rental cars.**All other employee travel expenditures must be paid by the traveler from personal funds and reimbursed on a Travel Voucher upon return.
Airline Tickets, Train Tickets plus baggage fees if purchased with ticket, and rental cars.	Travel Packages that include airline tickets, hotel and rental cars.
Conference/Registration Fees	Conference/Registration meals and hotel charges not included in the registration fee.
Fed-Ex/UPS-Express Shipping	Employee functions - examples: food for staff meetings

Membership Dues	Entertainment/Business Meals
Subscriptions	Gifts, Gift Certificates/Gift cards/Cash advances and money orders
Computer Software	Employee parking hangtags
Books	Telephone calling cards or additional minutes for calling cards
Printing	Holiday or Birthday Cards
Temporary Services under contract, such as Manpower.	Holiday ornaments or decorations
Postage & Office Supplies	Sporting events
Utilities	Foundation charges
Repairs	Gasoline
Hardware, such as Ace, Lowe's, Home Depot	Personal Charges
Telephone & Cell Phone payments that are in compliance with the University Personal Communication Services Policy	Vendors where MCC # is blocked
Marketplace may be used as an alternative for inter-departmental purchases.	Home Sharing (Airbnb, VRBO, Roomorama, HomeAway, etc.) is not allowed.
Lab Supplies	
Internet Providers	
Credits must be returned to cards	
Lodging: visiting speakers (room only)	
APL iTunes – for CU business applications only	
Purchases off State or Agency Contract, even if appearing as "split purchases."◇	Purchases over $2,500 - EXCEPTIONS are items with the following symbol**(◇)**
Payments to Conference Facilities for the purpose of reselling such conferences to the public.◇	
Other DPV Exemption purchases.◇	

4. Common Mistakes
    a. Printers and toner (Ricoh ONLY)

b. Hotel parking (Personal card ONLY)
c. Valet Parking (Not allowed on P-Card or personal card)
d. IT/Software purchases – Consult with CECAS CORE team prior to making purchase.
e. Airbnb (Personal card ONLY)
f. Flight – seat upgrade (Personal card ONLY)
g. Room service to include bottle waters, minibar, and food (Personal card ONLY)
h. Booking non-refundable rooms (Not on P-Card or personal card)
i. Using P-Card on personal Amazon account (Should be using CU Amazon Business Account)
j. Airport Parking (Choose the least expensive option available)
k. Employee Hotels (not allowable on P-Card)
l. Employee Food (not allowable on P-Card)

5. Purchasing Limits
    a. The normal purchasing card limit is $2,500 per transaction. There may be able to be temporary increases up to $10,000 for one-time purchases with permission of the Purchasing Card Administrator
        i. To request a P-Card Increase please follow these instructions.

DISBURSEMENT GRID

Use the disbursement grid to assess the availability of university funds by type of expenditure

TRAVEL POLICY

Clemson utilizes Anthony Travel and Concur for travel requests and reimbursements. Concur allows you to submit travel requests, utilize discounted travel bookings, and helps streamline expense reports.

Concur Travel Requests:

Travelers must identify funding and gather estimated travel costs before creating their travel request directly in Concur. Please see Travel Request Guide for more information. If this is your first time using Concur, please see the Concur Travel and Expense Quick Reference Guide.

After Travel:

Add all P-Card receipts to concur or travel processor within 5 days of your return. Add all other expense documentations (if there are any personal reimbursements).

Important items to note:

- As required by State Law, employees are required to travel in the most economical means that meet their business needs.
- If your airfare is to be paid for by federal grant funds you must fly on U.S. flag air carriers as per the Fly America Act. Please review this link for more information: Fly America Act.

- Baggage Fees: are an allowable travel expense. They can only be paid for up front by the University on a P-Card if purchased at the same time as the airline tickets. If purchased on the day of travel, the employee must pay with their own funds and request reimbursement.
- Car Rental: When traveling on university business originating from South Carolina, employees must use the University contract vendor for vehicle rentals unless the vendor is not available where the employee desires to rent. Employees may pay with a P-Card in their name, or a personal credit card and request reimbursement.
- Ground Transportation (Lyft, Uber, Taxi, Bus, etc.): Are allowable, but receipts for charges over $25 are required to be reimbursed.
- Parking: Allowable when a necessary part of trip. Valet parking is not eligible for reimbursement.
- Traffic Fines / Tickets: Not allowable.
- Visa Costs: Allowable if needed to enter a foreign country. Receipt must be provided for reimbursement.
- Conferences: High-level conference agendas are required when submitting travel expenses with the expectation that reviewers are able to review conference dates.
    - Conference agendas are to be attached to the pre-trip travel request prior to routing for approvals.

Additional Resources:

Clemson Concur Travel

Concur Training Resources

Clemson Travel Procedures and Guidelines

Contact Information

Clemson Travel Team:

864-656-3259, clemsontravel@clemson.edu

Anthony Travel Team:

864-656-8595, 8am – 5pm EST M-F, clemsoncampustravel@anthonytravel.com

Anthony Travel After Hours:

800-530-2560, Code 3T1F, 5pm- 8am EST M-F, Weekends and Holidays

ASSET / EQUIPMENT TRACKING

As a state institution, Clemson University is required to maintain records of equipment purchases and equipment use. This policy establishes the requirements for tracking the acquisition and maintenance of university equipment in adherence to state and federal regulations.

- In accordance with state law, ownership of all equipment acquired by the University, through acquisition or transfer (to include sponsored projects), rests with the University rather than with any individual, college, school, or department.

- Individuals and departments are required to notify Accounting Services when equipment valued at $5,000 or more (“capitalized equipment”) is acquired in accordance with the process outlined in the Equipment Manual.
- Equipment acquisitions with a unit value of $100 or more and less than $5,000 and meeting the criteria of a noncapitalized asset (“noncapitalized equipment”), must be inventoried by the department in possession of the equipment.

CECAS SOFTWARE / IT POLICY

All Software and computer purchases must be approved by the CECAS CORE Group prior to purchasing. Please review the complete software list below before submitting a request to CECAS CORE.

CECAS CORE – Software List

CECAS CORE – Software Onboarding

EQUIPMENT PURCHASES / SOLE SOURCE PROCUREMENT

Purchases over set dollar amounts have additional guidelines:

1. Purchases less than $10,000: no competition (quote) is required, prices must be fair and reasonable. Purchases must be distributed equally among qualified suppliers.

2. Purchases between $10,000 and $25,000: require a total of three (3) formal written quotes. Quoted products are to be identical. All quotes must be attached to the Requisition in BuyWays.
   Procurement will be responsible for verifying legitimacy. Quotes may consist of letterhead, email and/or web site pricing. Absent the adequate quotes, products will require a formal solicitation by Procurement and Business Services.

3. Purchases $25,000 and greater: will be bid out by Procurement and Business Services unless the product is on the state or agency contract, or there is an exemption number that applies to the purchase and/or it is a Sole Source procurement.

4. COTS Purchases between $25,000 and $100,000: Commercially Available Off the Shelf (COTS) products are defined as supplies other than printing or information technology/resources that is available in the commercial marketplace and are sold to the state without modification. COTS do not include printing and information technology/resources, products customarily sold in bulk, agricultural products and petroleum. COTS purchases require three (3) formal written quotes and will be subject to review and approval by Procurement.

5. Purchases between $100,000 and $3,000,000: Procurement and Business Services will create and manage solicitations.

6. Purchases over $3,000,000: shall be sent to the State Procurement Office in compliance with the code using SCIES requisition process.

7. Sole Source Procurement: $50,000 and above requires a written Sole Source Justification and public notification for 5-10 business days, less than $50,000 requires a written Sole Source Justification. Procurement and Business Services will evaluate all sole source requisitions.

Sole Source Justification:

Please review Sole Source Justification for guidelines. A sole source purchase is one where there is only one source (one supplier) that could possibly supply the required product or service. Examples of sole source transactions are:

- There is only one supplier that can meet the required specifications.
- The product that is required is under patent, copyright, or proprietary design.
- The product is available only directly from the manufacturer.
- The product is a replacement part or component for existing equipment and only available from one source.

Procurement Certification – Grant Specified Procurement:

If your fund 20 sponsored project proposal lists a specific product/service and vendor/consultant from which you will purchase goods, equipment, or services, use the Procurement Certification Form to obtain Procurement Certification Approval from GCA. With this approval, the purchase will be exempt from the requirements of the State of SC Procurement Code.

PROJECT / FUNDING INFORMATION

GAD

What is GAD?

The Graduate Assistant Tuition Differential (GAD) is the difference between full time resident (in-state) graduate tuition & fees and graduate assistant tuition & fees.

- Full-time Resident (in-state) Tuition & Fees – Graduate Assistant Tuition & Fees = GAD
- The GAD value is different for each tier and program code.
- All PhD programs are the same (some exceptions).
- MS students employed as GRAs will be charged the PhD tuition rate.
- All graduate assistants with an assistantship qualify for in-state tuition.

GAD for Fund 20 Projects:

- Per the University Tuition Remission Policy, Graduate Assistant Tuition Remission must be requested on all proposals that include graduate student assistantships
- Sponsored Research Maximum GAD (GRAs)

- There is a maximum amount that can be charged to Sponsored Research Projects and it can change every year.
  - Premier programs are exempt from this maximum.
- GAD normally should post to the same project as a student's payroll. If a student is split across multiple projects during a semester, the GAD should be split at the % effort. EX: If a student is split with 40% effort on project A, then 40% of their GAD should post to that project.

Additional Info:

- GAD normally posts with one charge in the middle of the semester.

CHARTFIELD STRINGS

A Chartfield string is the full account string that you will use to enter expenditures for your project.

Clemson currently has a 23-digit chartfield string.

EX: 7032 – 14 – 0926 – 101 – 130 – 1400000

(Account Code) – (Fund Group) – (Dept Code) – (Program) – (Class) – (Project)

An example of an account string is 7032-14-0926-101-130-1400000.

Here is a breakdown of this example string:

7032 = Account Number (Other Services – This should auto-populate based on expense type in Concur)

14 = Fund Group (The first two digits of the project number)

0926 = Department Code (Automotive Engineering)

101 = Program Code (Instruction. Note: Some projects may have multiple program codes that are used for tracking different commitments)

130 = Class Code (E&G Deptl Revenues. Note: You may have spending authority split across multiple class codes)

1400000 = Project (Dept Default)

Common Chartfield Strings (*There may be some exceptions to these*):

Startup Chartfield String

- xxxx-14-09xx-220-130/430-146xxxx

Creative Inquiry Chartfield String

- xxxx-15-09xx-115-126-155xxxx

Incentive Chartfield String

- xxxx-14-09xx-202-127/427-148xxxx

Additional Information:

- Please see the summary tab of your faculty workbooks for your full account strings.
- When entering reimbursements into Concur, you would enter the account description from a drop down, not the account #.
- The Class code for fund 14 projects should reference where funding is (1xx = new funding; 4xx = carryover with spending authority; 5xx = carryover reserve) based on your funding. You can tell from your budget update where the funds are and which class code to use. There would not be a scenario where you would enter a 5xx class code for a reimbursement.
- When filling out purchasing, payroll, hiring, or any other forms, please double check the chart field string and enter the correct information.

Please visit the Clemson Chart of Accounts website for a full list of Accounts

CREATIVE INQUIRY

Please see the following link for the most up-to-date information: CI Information

General Spending Notes:

- Each CI Project has a separate budget and account number in the department of the primary team leader.
    - Funding levels vary. Requests of up to a maximum of $2,000 per semester for a team of 6 or more students are permissible. You do not have to request funds to offer a CI.
- The CI spending deadline is normally earlier than the fiscal year end spending deadline.
- **All expenses must align with the budget request and justification for the project (outlined in the project proposal)**
- All invoices and receipts are handled within the department of CI Leader
- Faculty and/or department staff will make purchases for the CI Project.
- Funds for travel can support CI mentor travel to accompany students for field studies
- Conference travel is supported via a conference travel grant, not regular project funds
- Up to a quarter of the conference grant can support the mentor travel to the conference.
- Foreign travel requires advance approval by your college and the Office of Global Engagement and must include undergraduate students who are part of the CI project.
    - ** CI will not budget international travel funding until receiving the approval (or forwarded approval) from Global Engagement, the names of traveling students, and the travel itinerary from you.
- Prohibited expenses. CI funds cannot be used for (unless specifically approved):
    - Faculty professional development.
    - Any salaries (faculty, staff, undergraduate students or graduate students) or honoraria for outside speakers.
    - Supporting Senior Design or Capstone projects.
    - Food for Clemson University faculty or staff.
    - Laboratory, office or other equipment/furnishings.

        - Computers and/or computer equipment without a very specific justification addressing why the purchase is essential to the CI project.
    - Conference Travel
        - Travel funds for conferences and meetings must be requested through CI Travel Grants (separate application required).
        - These funds support travel for undergraduate student presentations at professional conferences.
        - Up to ¼ of the travel grant award may be used to partially support the mentor.
        - CI travel grants are intended to be partial support.
        - All travel must follow university policies and procurement procedures. Appropriate departmental and/or college permissions are required.
    - Excessive use of funds for refreshments is discouraged.
    - Computers and other technology purchases need to be minimal and must be in the budget justification and approved by the CI Office.
    - These funds must be used during the academic year. Budgets from one academic year (i.e., 2022-2023) do not carry over into the next year and will be pulled back by CI at the end of the fiscal year (i.e., 2023-2024).
        - To receive funding in subsequential years, a minimum of an annual report documenting adequate progress is required.
    - Summer CI + UR
        - Up to 40 Summer CI + UR awards will be offered to undergraduates each summer. These awards are for undergraduate student summer salary and will be budgeted into the appropriate CI account.

FRIP AND ARAYR POLICY

Clemson's Faculty Research Incentive Plan (FRIP) incentivizes and rewards high-funded faculty. FRIP allows faculty to use a performance-based compensation plan where they can use available and allowable external designated funding to charge their academic year time. The recovered salary enables a one-time incentive bonus of 50% of the salary savings, not to exceed 30% of their Institutional Base Salary. This payment is not paid out until the following fiscal year. This policy has specific eligibility requirements and requires an expression of intent. Please see the link below for more information.

Clemson FRIP Policy

CECAS's (ARAYR) Policy requires for CECAS large scale federal and state research allocations, faculty receiving academic year salary from (E&G Funding), who are planning to receive summer pay from state and federal allocations will need to release academic year time before receiving summer compensation. EX: If a grant has 3 months of compensation budgeted for a faculty member, 1/3 of it needs to be used to release academic year time before using the remainder for summer pay. Please see the link below for more information.

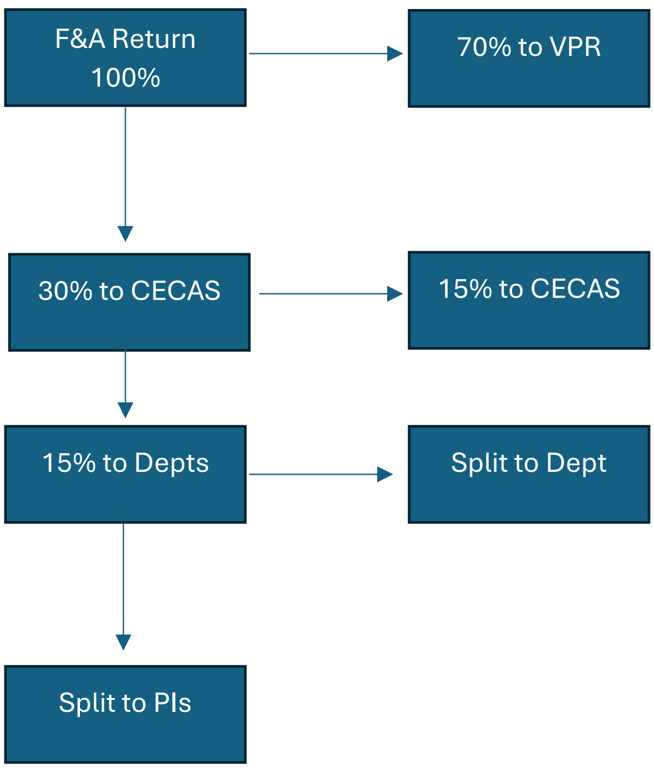
AYAYR Policy

INCENTIVE RETURN PROCEDURE

The amount of incentive funds to be allocated is based on F&A cost recoveries generated during the prior twelve-month period of July 1st through June 30th. EX: FY23 actuals are used when calculating FY24 F&A Budget allocations.

Note: Some funding sources may be exempt from an F&A return.

Please see the chart below for the typical breakdown for how incentive return is split.



70% is retained by the VPR

Building Maintenance Costs are split before the total college portion is split

Percentage splits between Department and PI may vary across CECAS

If there is more than one PI this return will be split based on the PI Percentage.

Incentive returns are typically transferred to faculty accounts late fall semester to early spring semester.

BUDGET PLANNING + MANAGEMENT POLICY FOR FACULTY

Faculty members are responsible for collaborative budget planning & spending tracking with their department's financial business manager & post-award manager.

Budget accuracy is very important in managing financial risks, assessing university bond ratings, and ensuring overall financial sustainability.

[See link for more on this policy]

OPEN ACCESS PUBLISHING FUNDS

Clemson Libraries has an Open Access Publishing fund available to help researchers pay OA Publishing fees. Applications for this funding are available to faculty, researchers, post-docs, and graduate students. Clemson Libraries also has agreements with a few OA publishers to allow faculty to publish at no cost. Please see the link below for more information.

Open Access Publishing Fund Information

GRADUATE TRAVEL GRANT SERVICE GRANTS

Graduate Student Government offers GTGs (Graduate Travel Grants) that support grad student travel to conferences, workshops, and field experiences. Applicants can receive a maximum of $750 for domestic travel and $1,000 for international Travel. Please see the link below for more information.

GTGs Information

CLEMSON R-INITIATIVES AND FUNDING OPPORTUNITIES

Clemson's Division of Research offers R-Initiative programs that provide funding opportunities and professional development support.

Examples of these Programs Include:

- Clemson Research Fellows (Provides Funding Support for hiring and training of research faculty and postdoctoral researchers)
- Clemson Faculty Succeeds (Provides Funding Support to faculty at various stages of research process)
- Sponsor Travel Grant (Provides travel funding to investigators to establish relationships and discuss new funding opportunities)
- Doctoral Dissertation Completion Grants (Provides funding to students who are working to complete their doctoral degree)

Please review the R-Initiatives website for more details on these funding opportunities and for instructions on how to apply

POST AWARD MANAGEMENT

PI Responsibilities:

- Acknowledge Award and Accept Terms and Conditions
  - Ensure compliance
- Coordinate budget adjustments with PAFM
- Ensure Sponsored Project progress and expenditures correlate
- Review and Approve Sponsored Compensation Verification Reports

- Approve all expenses and allocation on sponsored project
- Monitor technical progress on sub-awards and approve sub-award invoices, when applicable
- Report patents and inventions to GCA, as applicable
- Coordinate with Department, College, and GCA if a no-cost extension is needed
- Submit progress/final technical reports as required on individual awards
- Submit progress and final technical reports in a timely manner.
- Request / Approve changes needed to complete work and scope during life of project

General Project Rebudgeting Guidelines:

Rebudgeting between categories requires approval by GCA prior to posting. Some sponsors require their approval prior to any budgetary changes. A good general rule of thumb is that an adjustment of 10% or below of the full award amount is likely to be approved. Adjustments that do not change the scope of work and do not change any main contributing personnel are more likely to be approved. You are not able to transfer out of participant support without sponsor approval. You cannot transfer budgets between sponsored projects unless they are on the same contract.

Equipment purchases should not wait until the last minute. This reduces any red flags about the equipment being purchased on the project but not enough time to utilize the equipment for the benefit of the award.

If funds are left in the project at the end of the project, they will be returned to the sponsor if a fixed price transfer is not possible.

Fixed Price Transfers:

Please review the Policy on Residual Balances in Fixed Price Contracts

Residual Balance Authorization Form

Following contract/project completion and deliverables submitted and accepted by the sponsor and final payment received, the residual direct cost balance in fixed price contracts will be transferred to the incentive account of the principal investigator given the following conditions: (1) all direct charges are properly accounted for, (2) all indirect costs have posted in accordance with the direct cost expenditures, and (3) the remaining direct cost budget is not greater than 10% of the total awarded direct budget. The PI's College will be responsible for transferring amounts to other investigators based on the percent credit distribution indicated on the CU proposal. If the residual direct balance is greater than 10% of the total direct award budget, the PI is required to submit an "Authorization for Residual Balance Transfer" form to Grants and Contracts Administration for the Vice President for Research approval before the funds will be transferred.

IRB Guidelines:

Please make sure that all research involving human subjects be reviewed and approved by CU's IRB Office prior to initiation of the research. Please see the Institutional Review Board section of this guide for more details.

GCA Essential Tools

Clemson Research Policies

COST SHARING/MATCHING ON GRANTS

What is cost-sharing/matching?

- It's a commitment of resources by Clemson or a CU partner to share in the costs of conducting a sponsored project (usually required by the sponsor if committed). The commitment is usually of a monetary nature but could be for goods, services, or volunteer time. There is a cost share agreement for each commitment, and it outlines each unit's commitment over the life of the grant

Can I find documentation about cost-sharing/matching on the web?

- Yes, GCA's website contains a policy guide with a section dedicated to this topic.

CECAS Cost Share Supplemental Policy / Guidance:

All cost share agreements which are voluntary, or outside of the standard 1/3, 1/3, 1/3 split are required to have negotiations completed five business days before the proposal deadline and should include VPR, ADR, department chair/school director, and pre-awards directors. It is the faculty member's responsibility to get the agreement in writing and provide the agreement to the pre-award's office 5 days prior to the proposal submission deadline. If cost share exceeds 25% of the requested sponsored funds, and totals more than $150,000, the faculty member should discuss it with the CECAS ADR prior to moving forward with proposal development.

Voluntary Cost Share Guidance

Voluntary cost share is any cost sharing that is not required by the sponsor as a condition of the award. Voluntary cost share will only be used to strengthen strategic proposal submissions, to enhance the competitiveness of a proposal. Voluntary cost share should be investing in research lab infrastructure. Examples of the types of proposals where administrators would agree to voluntary cost share are: EFRC, COBRE, etc.

Current Cost-Sharing Policy Updates within RBB

Mandatory cost share will be split 1/3 VPR, and 2/3 College + Department, at the discretion of the college. VPR's one-third cost share will be covered utilizing strategic budget allocation. In general, departments will release faculty time to cost share, and the college and VPR would pick up cash contributions to cover infrastructure and personnel support.

Research Division Cost Share Policy

SPONSORED COMPENSATION VERIFICATION

The Sponsored Compensation Verification System (SCVS) is an after-the-fact project-based payroll confirmation process where Principal Investigators (PIs) review and approve salaries and wages (i.e., compensation) for all personnel charged to their awarded sponsored projects on a semi-annual basis.

Compensation reports are generated twice per year (typically August and February) for activity incurred during periods (January 1 through June 30) and (July 1 through December 31). For each principal investigator with a Sponsored Compensation Verification System (SCVS) report to be approved, an initial notification will be sent to their Clemson University e-mail account once reports are made available for review and approval. In addition, ad hoc reports will be made available on the SCVS website for College Post-award contacts to monitor individuals who have outstanding SCVS reports that need approvals.

Additional Information

Sponsored Compensation Verification System Login

SCVS Training Video

Sponsored Compensation Verification System – Frequently Asked Questions

CONTACT INFORMATION

BUSINESS OFFICE FINANCIAL CONTACTS

Business Office Contacts

Please use the link above to view the contact information for the Business Office team.

DEPARTMENTAL FINANCIAL CONTACTS

This is the general departmental matrix. Structure & responsibilities may vary slightly by department. Please consult with your office manager if you are unsure of who can assist with a particular item. If you have funding in another department, please contact that department's PAFM or FBM.

Departmental Financial Responsibilities Matrix

Financial Business Manager	Post Award Financial Manager	Procurement & Payroll Support	Office Manager	Grad Student Service Coordinator
State & Foundation *(Non-fund 20)* Funding & Management	Grant Management *(Fund 20)* Award to Closeout	Student & CUF vouchers in Peoplesoft	Booking & Coordinating Travel Arrangements *Faculty, Staff, Students, & Guests* **If not managed on their own*	Graduate Student onboarding - First Point of Contact for all Graduate Students
Monthly Departmental & Faculty Updates (non-fund 20 & Cost share)	Grant Workbook Updates	Concur	Purchasing with P-card as needed	Graduate Student Contracts
State & Foundation Error Report	Grant Error Report	BuyWays requisitioner and invoice handler	Staff & Faculty Hiring to include Tiger Talent	Steps 1-3 of the international employee hiring instructions
CUF Voucher Approval	Clemson Cost Share Certification	P-Card Liaison	Collaborate with CECAS Chief of Staff & HR Service Manager on Staff/Faculty Compensation updates	Connect the students with the PPS Staff for Payroll Paperwork - Handoff
State & Foundation Disbursement & Payroll Corrections	Grant Disbursement & Payroll Corrections	Deposits	Deposit Receipting	Coordinate with the PPS Staff on Any Necessary Student Changes
Budget Amendments	Grant Rebudgeting	GS61 Entry & Management	Student International Travel Requests - *Paper Forms*	
State & Foundation Reconciliation	Grant Reconciliation	All Undergrad and Grad Hires See *Graduate Student Hiring Process*		
IDO Entry	No Cost Extensions	Post-Hire Payroll Management		
Billing Rates	Liaison to GCA & OSP	Kronos Support & Management as Lead Timekeeper		
College Level Budget Requests	Financials for Assistance to Sponsor Reporting	Summer Pay		

GCA

GCA assists Principal Investigators (PIs), department staff, and administrators with post-award financial and administrative matters related to their sponsored (Fund 20) projects. GCA provides administrative oversight for functions that include all post-award programmatic and financial activities, which include requests to sponsors for no-cost extensions, changes in scope, reduction in time, and disengagement greater than 90 days, as well as sponsored project setup, accounting, invoicing, financial reporting, cash receipts, collections, payroll confirmation, and audit functions from award receipt to close out. The office has University-wide responsibility for ensuring that project expenses and reports to sponsors are compliant with Federal, State, and University laws and regulations as well as specific sponsor guidelines.

GCA Contact Information

OFFICE OF SPONSORED PROGRAMS

The Office of Sponsored Programs is the pre-award office of the Division of Research and grant proposal submissions, award acceptance, and negotiation of non-disclosure, material transfer, and other research-related agreements. Normally, you will want to contact the CECAS Pre-Awards office prior to contacting the Office of Sponsored Programs.

Standard Information for Proposal Applications

Researcher Resources

Contact Information

INSTITUTIONAL REVIEW BOARD (IRB)

Clemson's Institutional Review Board is a federally mandated body that protests the rights and welfare of human subjects recruited to participate in research activities conducted under the auspices of Clemson University.

University Policy requires that all research involving human subjects be reviewed and approve by CU's IRB office prior to initiation of the research. This requirement applies to all human subjects research conducted by faculty, staff, and students, on-and off-campus, regardless of the funding support, if any for the project.

IRB Website

Contact Info

What needs IRB review?

IRB Training

IRB Forms

IRB FAQ

CECAS PRE-AWARDS

The CECAS Proposal Development Office is available to assist faculty with pre-awards activities:

Areas of Assistance:

- Identify Funding Sources
- Proposal Review and Submission
- Solicitation Review and Compliance
- Institutional Collaborations
- Assistance with completion of Proposal Applications and Budget Preparation
- Provide Reports Upon Request

Pre-Award Funding Request

Proposal Development Steps

Contact Information

CECAS CORE

The CECAS CORE (Computing Operations and Research Enterprise) team is available to help with support services for Operating Systems (Windows, Mac, and Linux), software guidance, classroom assistance, printer help, hardware repairs, remote assistance, computer lab administration, and equipment purchasing consultations. Please see the links below for more information.

CECAS CORE Onboarding Information

Faculty-Staff Onboarding Guide

Teaching and Classroom Technology Resources

CECAS CORE Resource List

Clemson CCIT Status Page (to view the status of Clemson IT systems)

CECAS PROMO

The CECAS PROMO (Public Relations, Outreach and Media Opportunities) team is available to assist faculty in these areas:

- Web Development
- Print + Brand Design
- News Announcements
- Video (Non-News Related)
- Signage + Display
- E-Newsletters and Email Design
- Proposal Support (Graphics Support)
- Event Item Reservations

CECAS Promo Service Offerings and Information

PAYROLL AND HIRING INFO

PAYROLL

Please make sure you have enough funding to hire someone on your project. Fringe benefits will be charged to your project in addition to salary. If you hire someone on an assistantship, make sure you have enough funding to cover any GAD expenses too.

Compensation Categories:

CLASS: Classified Employees, usually staff. These employees have FTE status.

UCLASS: Unclassified Employees. Normally for 9-Month faculty, but some 12L faculty and 12L staff may post here too. These employees have FTE status.

GRAD: Graduate students who are paid with a stipend (EX: GTA, GLA, GGA, GAA, GTR)

WAGES: Temporary part-time employees, hourly undergraduate students, and hourly graduate students. Some post doc employees may fall into this category too.

WAGET: Temporary staff or faculty. These employees may be 12L or 9MA. This is normally where post doc employees and research faculty post.

FRINGE: Includes benefits given to employees in addition to their salary (health insurance, retirement benefits, etc.). It is applied as a percentage of salary, which varies depending on how an employee is classified. Rates for current fiscal year found here.

Employee Timesheets:

Please make sure to regularly approve employee timesheets for anyone who you supervise. Approvals are generally required to be complete by noon the day after the pay period ends. EX. The pay period ends on the 15th, timecard approval is due by 12pm on the 16th. Some approvals may be accelerated. Email communication will indicate when an accelerated deadline is to occur.

Payroll Corrections:

If someone posted a payroll expense in error to your project, please contact your FBM / PAFM staff to assist with any corrections. If correcting onto a grant, cost transfer forms will have to be approved, so these can take a few weeks to process.

Payroll on a Grant:

Some grants have specific rules for hiring international employees. Please contact your PAFM with any questions. Payroll posted to a grant will have to be from a time period when a grant was active and be for appropriate effort applied to the grant.

Summer Payroll:

Summer Compensation forms for faculty normally are sent out in April. Please contact your PPS staff members with any questions.

CECAS Max Allowable Summer Pay Policy:

As stated in Research Divisions' Institution Base Salary Policy (2.0.4.2 Institutional Base Salary), the max allowable summer pay for any 9MA faculty is 1/3 of the faculty member's institutional base salary. Per the faculty manual, if a faculty member has charged any of their 9MA time to a grant, exceeding the max allowable pay is prohibited.

Any requests for summer pay overage require department chair and dean approval. General guidance for appropriate requests is as follows:

- Research

        - 9MA research faculty who have been supported by E&G resources during the AY may not exceed max allowable summer pay.
    - Teaching
        - exceed requests related to mandatory teaching are acceptable.
        - directors and chairs should be cognizant of summer course profitability and utilize standard departmental average salary amount as maximum pay for teaching a summer course.
        - Exceptions should be clearly articulated and approved in advanced.

Research Division's Institutional Base Salary Policy

Sabbaticals:

Clemson's Sabbatical Policy is available here. The CECAS Sabbatical Policy is available here. If you are taking a sabbatical for a full year, you will receive half-pay. If taking a sabbatical for half year, you will receive full pay. A faculty member returning from sabbatical leave is expected to return to regular service with the college for at least one contract year (either 9 months or 12 months).

Buyout Lapse:

Faculty working on sponsored research projects or other internally or externally funded projects during the academic year may charge a portion of their time, if allowed by the sponsor, to reduce (or buyout) their teaching responsibilities. This requires department chair approval. It is important to note that a sponsor may cap the Institutional Base Salary charged to a sponsored research project. Buyout is typically set at 12.5% of a faculty member's academic year-salary (corresponding to one block per course in eight-block annual workload). Buyout funds must include the fringe charges as well. It is recommended faculty intending to buyout teaching responsibilities should indicate this decision to their department chair no later than May 15th for the fall semester and October 15th for the spring semester. Department chairs can manage these on a case-by-case basis.

It is also important to note that Buyouts are separate from FRIP and ARAYR and funding cannot be counted towards multiple items. EX: Funding for FRIP cannot also be counting towards buyout lapse.

STUDENT HIRING TIPS

Tips to get your student worker hired, on payroll, and working quicker.

What to send to payroll staff:

- Name of student (any identifiers such as CUID or email are also helpful)
- Job Code – hourly, GRA, GTA, etc.
- Standard / Maximum Hours
- Pay Rate
- Account String or Project Number
- Start Date (Targeted Date, or as soon as paperwork is finished)

- **Important**: Do not have the student work any hours until they are fully hired, entered into the payroll system, and have reached their start date.
- **Preferably**: complete the New Employee Data Sheet and send to the Departments PPS

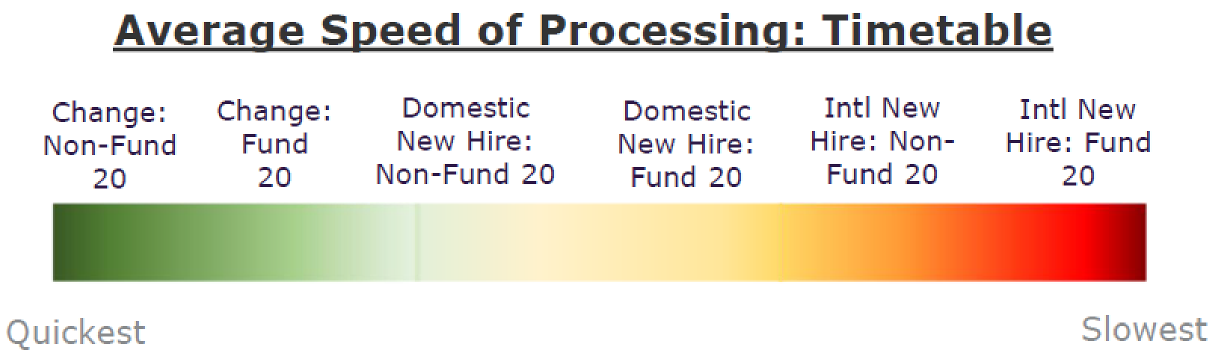
What can Delay Hires?

- Not including certain items in email from items above
- A student who does not have a social security number has some extra things to obtain, so it will often take longer
- International Students have different paperwork and items to take, so they will normally take longer than domestic students to hire
- Students hired on a fund 20 project need signatures, so students hired on those funds may take longer than those hired on non-fund 20's
- Forms sitting idle in Adobe Sign
- Students who do not complete forms or set up hiring meetings in a timely manner.

Other Items to be aware of:

- New student hires usually take anywhere from 2 to 12 days depending on if the student has a social security number, and how quickly they can return paperwork and set up appointments.
- Changes to a current student record usually take anywhere from a couple of hours to a few days.
- Certain projects may require additional approvals to hire international students.
- Be on the lookout for emails at the end of each pay period to approve timesheets for your hourly workers.
- Students who are hired hourly and on assistantship usually are hired with lag payroll (meaning that they will get paid on a 1 paycheck delay)
- To maintain a graduate assistantship, a student must maintain full-time enrollment status. This requires at least 9 graduate credit hours during the fall and spring semesters. If an assistantship is awarded for the entire summer (Long Summer), the student must register for at least 6 graduate credits. Any credits for research must be registered in the Long Summer section. An assistantship in one of the 6-week part of terms (SSI, SSII) will require registration in 3 graduate credits during that part of term.
- Graduate and undergraduate student employees are limited to 28 paid service hours per week.
- International student employees are limited to 20 cumulative (paid service hours + volunteer hours) while classes are in session. During holidays and the summer international students may work up to 28 hours per week. Please review the International Student Work Calendar for more information.
- Make sure that your project has enough funding for the students' payroll.
- Verification of English Skills Test (VEST): All new international graduate students who have been offered student facing assistantships (does not include research assistants or graders) are required to take the test if their TOEFL speaking score was below 26, their IELTS speaking score was below 8.0, their PTE below 74, and their overall Duolingo score less than 130. Please review the Global Engagement website for more information.

- [Additional Student Employment Resources]
- [UPIC Information]



UNIVERSITY TOOLS

FBIS (FACULTY BUSINESS INFORMATION SYSTEM)

FBIS is a dashboard tool that allows users to view the Budget, Expenditures, and Project Balance of projects within fund groups 10-20. It lets a user view the current budget by category and filter for posted journal entries and payroll detail.

Items to note:

- Journal entries (Expenses and Revenue) do not populate in FBIS until they have fully posted in the university's financial system.
- FBIS is based on actuals and does not account for projections, anticipated commitments, payroll, pending purchase orders under $2,500, and Concur expenses.
- Encumbered purchase orders will only populate for BuyWays orders over $2,500 and there are frequent issues with encumbered POs not populating or not clearing once they have closed.
- Projects that have commitment timelines may not reflect accurate balances in FBIS (most often happens with startups)
- It is not possible to view only one side of a shared fund 14 project
- FBIS does not show spending authority balances

FBIS Tutorial Link

CONCUR

Clemson University utilizes SAP Concur for P-Card expenses, personal reimbursement, and travel requests and reimbursements. If this is your first time using Concur, please see the Concur Travel and Expense Quick Reference Guide.

Please see the Procurement Guidelines section of this guide for more information.

Concur Tutorials (Updating your Travel Profile, Booking a Flight, Booking a Hotel, Booking a Car)

Please have your departmental PPS staff member review reports (travel requests, p-card reports, travel reports, etc.) prior to submitting in concur. Please use this guide to add PPS staff as delegates in concur.

BUYWAYS

Clemson University's online procurement portal, BuyWays, is the preferred purchasing method, this is because there is an online record of historical transactions and purchasing protection via purchase orders (POs).

Registering in Buyways:

- Users can register as shoppers using this link: Add a New User to BuyWays

Supplier Registration:

- Suppliers will need to register in BuyWays before a purchase is made.

No PO, NO Pay Policy:

- The procurement of all goods and services must be based on a purchase order issued to the supplier through our eProcurement system prior to the delivery of the goods or commencement of the service. Except when approved in writing by the Director of Procurement, when placing orders using a Purchasing Card, or when paying approved direct expenditures. (In other words, you must submit a quote and obtain a purchase order before goods or services are received).

BuyWays Assistance: Your departmental PPS staff member is available to support purchases and help process in BuyWays

BuyWays 101 Training Courses

INFOED

The InfoEd electronic submission process is the standard mechanism to submit, review and approve IBC, IRB and IACUC applications at Clemson University.

Contact Clemson's Office of Research Compliance should you encounter any issues or have any questions.

InfoEd reference materials here

CECAS TOOLS

STATE AND FOUNDATION WORKBOOKS

Financial Business Managers (FBMs) work on providing updated account balances and projections. Information about one of our most common templates is below.

Workbook Summary Tab:

Project Balance Summary
Last Name, First Name
6/4/2024

State Projects

Project Number	Project Name	Full Chartfield String	Budgeted Carryover 4xx Budget	*Savings*	Projected Revenue	Actual Revenue	Expenses & Projections	Anticipated Revenues	Projected YE Spending Balance	Projected Cash Balance	Notes
XXXXXXX	Faculty Discretionary	14-09XX-XXX-XXX-XXXXXXX	0.00	0.00	700.00	700.00	698.09	0.00	1.91	1.91	
XXXXXXX	Faculty Billing Rate	14-09XX-XXX-XXX-XXXXXXX	55,857.07	0.00	4,410.00	0.00	23,333.52	0.00	36,933.55	32,523.55	
XXXXXXX	Faculty Incentive	14-09XX-XXX-XXX-XXXXXXX	15,000.00	25,333.51	4,300.95	4,300.95	(7,927.32)	0.00	27,228.27	52,561.78	Incentive Projects are not normally able to be used for summer pay

Foundation Projects

Project Number	Project Name	Full Chartfield String	PROJECTED BUDGET BALANCE	PROJECTED TOTAL BALANCE	Allowable Expenditures	Notes
22XXXXX_57XXXXX	Foundation Discretionary	XXX-XXX-XXXX-22XXXXX_57XXX	73.41	N/A	$100 of discretionary funding	

Top Section: Lists the budget and spending authority for all your state projects.

Bottom Section: Lists the budget balance and total balance for all your foundation projects

Project Number: This column lists all your active projects. If you have a shared project, you may see a project number like 22XXXXX_57XXXXX. In this case the first seven digits are the CU side of the project, and the last seven digits are the CUF/CURF Side.

Project Name: This lists the project name for each project.

Full Chart Field String: This lists the full chartfield string that you will use for any expenses.

Budgeted Carryover 4xx Budget: The amount of carryover you planned to utilize for the project in the current fiscal year, based on your project expense planning stage (carryover funds are class 4xx, funds generated in current fiscal year are class 1xx)

Savings: The funding in the project that does not currently have spending authority.

Projected Revenue: Any revenue that was expected for the year, either based on trend or discussions in planning stage.

Actual Revenue: The amount of revenue that has been transferred into the project. This includes all billed revenue, and this may have not been received by Clemson yet.

Expenses & Projections: What's spent already + any projections (including projected payroll & encumbrances) for yearly spending.

Anticipated Revenue: Any projected revenue commitments

Projected YE Spending balance = Budgeted carryover + revenues – expenses & projections

Projected Cash Balance = Projected YE Spending Balance + savings + future year revenue/funding (best picture of your current balance, exclusive of current year spending authority)

Project Tab – Top Section:

Total Carryover From prior years		Budgeted Carryover 4xx Budget	*Savings*	Projected Revenue	Actual Revenue	Expenses & Projections	Future Year Funding to be Allocated	Projected YE Spending Balance in Current FY	Projected Cash Balance
-		-	-	-	-	-	-	-	-

- Total Carryover = The total balance in project at close of last fiscal year
- Budgeted carryover 4xx Budget = The amount of carryover you planned to utilize for the project in the current fiscal year, based on your project expense planning stage (carryover funds are class 4xx, funds generated in current fiscal year are class 1xx)
- Savings (previously known as the carryover reserve) is the remaining carryover- this will remain in class 5xx and carry into the next year
- Projected Revenue = Any revenue that was expected for the year, either based on trend or discussions in planning stage
- Actual revenue = The amount of revenue transferred in.
- Expenses and projections = What's spent already + any projections (including projected payroll & encumbrances) for yearly spending
- Future Year Funding to be allocated= future revenue or funding that is anticipated (most used for startup agreements)
- Projected YE Spending balance = Budgeted carryover + revenues – expenses & projections
- Projected Cash Balance = Projected YE Spending Balance + savings + future year revenue/funding (best picture of your current balance, exclusive of current year spending authority)
- BVA revenue = the difference between the actual revenue and the projected revenue.
- For a foundation project, the only summary figures will generally be 'Projected Budget Balance' (Balance based on current FY spending plan, net of projections) & 'Projected Total Balance' (Cumulative project balance that faculty member has access to, if applicable).

Project Tab – Middle Section:

		UCLASS	CLASS	GRAD	WAGES	WAGET	FRINGE	TRAVEL	EQUIP	OTHER	DEPGAD	STUAID	WAIVER	TRSOUT	TOTAL
1xx Class	Budget	-	-	-	-	-	-	700.00	-	-	-	-	-	-	700.00
	Expended	-	-	-	-	-	-	698.09	-	-	-	-	-	-	698.09
	Encumbered	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Journal Errors	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Payroll to Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Anticipated Commitments														-
	Anticipated Revenue														-
	1xx Balance	-	-	-	-	-	-	1.91	-	-	-	-	-	-	1.91
4xx Class	Budget	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Expended	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Encumbered	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Journal Errors	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Payroll to Post	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Anticipated Commitments														-
	Anticipated Revenue														-
	4xx Balance	-	-	-	-	-	-	-	-	-	-	-	-	-	-
SPENDING AUTHORITY		-	-	-	-	-	-	1.91	-	-	-	-	-	-	1.91
5xx Class Savings	**Budget Only Request Required**	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL CASH BALANCE		-	-	-	-	-	-	1.91	-	-	-	-	-	-	1.91

This section shows you the total budget, expenditures, projection, and balance by budget category.

Project Tab – Bottom Section:

Account Type	Account Code	Total	Journal ID	Date	Status	Budget Status	Account	Fund	Dept	Program	Class	Project	Amount	Line Descr	Ref	User	Year	Descr
TRAVEL	6010	48.00	APPXXXXX	5/21/24	P	V	XXXX	14	XXXX	101	130	XXXXXXX	48.00	Travel Allowance (Pe	CNCXXXXX	NITEPRCS	2024	
TRAVEL	6015	553.70	APPXXXXX	5/21/24	P	V	XXXX	14	XXXX	101	130	XXXXXXX	553.70	AMERICAN AIR 01-AF	2024-04-03	NITEPRCS	2024	
TRAVEL	6017	96.39	APPXXXXX	5/21/24	P	V	XXXX	14	XXXX	101	130	XXXXXXX	48.96	Taxi/Ride Share	CNCXXXXX	NITEPRCS	2024	
			APPXXXXX	5/21/24	P	V	XXXX	14	XXXX	101	130	XXXXXXX	47.43	Taxi/Ride Share	CNCXXXXX	NITEPRCS	2024	
TRSIN	9214	(700.00)	CTXXXXXX	8/21/23	P	V	XXXX	14	XXXX	0	130	XXXXXXX	(700.00)	Faculty Transfer	NNXXXXXXX	MMAVIS	2024	

This section shows you details on all the expenditure and revenue lines that have posted to your project. Scroll to the right for payroll information if payroll has posted to the project.

Journal IDs in the bottom section will start with one of the below codes:

Journal Header	Description
APCL	Accounts Payable Closing
APP	Concur/Peoplesoft Voucher
BCK, BCE	Background Check
BI	Billing (web invoices)
CATER	Aramark Invoice
CCPA	Credit Card Processing Fees (Marketplace)
CHG	Procurement Card Charge
CRE, CRU	Cash Receipts, IDTs, Corrections
FWO	Facilities Work Order
HRP	Payroll Line Items
IDO	Interdepartmental Order
ILAB	ILAB (EM Lab Charges)
JEC	Journal Entry Correction
MPC	Managed Print Services
MTP	Motor Pool Charges
PHO	Photographic Services
PLT	Printing and Plotting
POS	Central Mail Room
POSTAL	Postal Billing (Central Mail Room)
PRC	Payroll corrections (retroactive adjustments)
SRB, SRE	Student Banner (iROAR) Transactions (multiple items)
TEL	Telecom
TELANN	LAN Charges
UTL	Utilities Charges
UJE	Miscellaneous Journal Entries
VCE	Voucher Correction Entry
VPS	Video Production Services

POST AWARD WORKBOOKS

Post Award Financial Managers (PAFMs) work on providing updated account balances and projections. Information about one of our most common templates is below.

Workbook Summary Tab:

Project Balance Summary
Last Name, First Name
6/20/2024

Sponsored Projects

Project Number	Project Name	Full Chartfield String	Sponsor	Project End Date	Budget	Expended	Encumbered	Current Balance	Journal Errors	Payroll to Post	Anticipated Expenses	Projected Balance
20XXXXX	Project Name	20-09XX-201-2XX-20XXXXX	Sponsor Name	9/30/2023	340,286.94	339,141.63	0.00	1,145.31	0.00	0.00	0.00	1,145.31

Project Number: This column lists all your active fund 20 projects in the department managed by the PAFM.

Project Name: This lists the project name for each project.

Full Chartfield String: This lists the full chart string that you will use for any expenses (Fund-Dept-Program-Project

Sponsor Name: This lists the sponsor's name for the project (EX: NSF)

Project End Date: This lists the end date of the project.

Budget = The budget (without FACADM) for the project

Expended = The amount that has been spent and fully posted from the project.

Encumbered = This is a projection for pending BuyWays POs that will be posted to the project.

Current Balance = The current balance (Including encumbered POs but no other projections) in the project.

Journal Errors = Any Items that are in error in the financial system but have generated a journal line.

Payroll to Post = Projected payroll for your project

Anticipated Expenses: Any other projected items for your project.

Projected Balance = The current balance minus any pending projections.

Project Tab – Top Section:

This section lists project specific information such as the Primary PI, Additional PI's, sponsor Info, F&A rate, etc.

09XX-2XX-2XX-	XXXXXXX	Project Name				
Last Name,First Name	ALLOWABLE EXPENDITURES:					
20-09XX-2XX-2XX-20XXXXX						
XXXX						
	Sponsor:	Sponsor Name				
	Primary PI:	Last Name, First Name	Additional PI's:		Cost Share?	N
	Contract Number	123456	PPN:	______	F&A Rate	52.0%
	Project Start Date	3/1/2017	Project End Date	9/30/2023	Days Remaining	-136

Project Tab - Middle Section:

This section lists the total budgets, expenses, current balance, projections, and projected balance for a project.

PROJECT	ACCOUNT TYPE	BUDGET	EXPENDED	ENCUMBERED	CURRENT BALANCE	JOURNAL ERRORS	PAYROLL TO POST	ANTICIPATED EXPENSES	PROJECTED BALANCE	NOTES
XXXXXXX	UCLASS	78,315.98	78,315.98	-	-	-	-		-	
	CLASS	-	-	-	-	-	-		-	
	GRAD	82,890.73	82,890.73	-	-	-	-		-	
	WAGES	76,747.36	76,747.36	-	-	-	-		-	
	FRINGE	38,668.12	38,668.12	-	-	-	-		-	
	EQUIP	-	-	-	-	-	N/A		-	
	SPNGAD	35,850.00	35,850.00	-	-	-	N/A		-	
	SUBCON	-	-	-	-	-	N/A		-	
	PARTSP	-	-	-	-	-	N/A		-	
	TRAVEL	20,013.79	20,013.79	-	-	-	N/A		-	
	OTHER	7,800.96	6,655.65	-	1,145.31	-	N/A		1,145.31	
	STUAID	-	-	-	-	-	N/A		-	
	WAIVER	-	-	-	-	-	N/A		-	
DIRECT BALANCE		340,286.94	339,141.63	-	1,145.31	-	-	-	1,145.31	
	FACADM	157,711.65	157,711.65	-	-	-	-		-	
TOTAL DIRECT & INDIRECT		497,998.59	496,853.28	-	1,145.31	-	-	-	1,145.31	

Project Tab - Bottom Section:

This section lists rolled up expenditure data in the bottom left. The right-side lists a compensation summary with projected payroll and if you scroll further to the right, you can find the full expenditure and payroll breakdowns.

Expense Summary					
Account Code	Category	Account Code Description	Total Posted	Total In Error	Posted Since Last Update
5053	UCLASS	Uclass Salaries - Summer Pay	$ 78,315.98	$ -	$ -
5100	GRAD	Grad Asst Sal Research	$ 82,890.73	$ -	$ -
5150	WAGES	Sal & Wages Undergraduate	$ 29,662.56	$ -	$ -
5151	WAGES	Sal & Wages Graduate	$ 47,084.80	$ -	$ -
5220	FRINGE	Pooled Fringes - 9 Month Emp	$ 26,054.43	$ -	$ -
5223	FRINGE	Pooled Fringes-Undergrad Studt	$ 389.01	$ -	$ -
5226	FRINGE	Pooled Fringes-Grad Students	$ 12,224.68	$ -	$ -
5351	SPNGAD	PhD GAD - Sponsored Prog	$ 35,850.00	$ -	$ -
6009	TRAVEL	TIS:Registration Fees	$ 381.00	$ -	$ -
6010	TRAVEL	TOS:Meals Business Related	$ 1,310.00	$ -	$ -
6012	TRAVEL	TOS:Lodging	$ 4,531.94	$ -	$ -
6013	TRAVEL	TOS:Mileage Personal Reimburse	$ 378.75	$ -	$ -
6015	TRAVEL	TOS:Commercial Air Fare	$ 4,803.20	$ -	$ -
6017	TRAVEL	TOS:Other Expenditures	$ 1,159.26	$ -	$ -
6018	TRAVEL	TOS:Registration Fees	$ 4,749.00	$ -	$ -
6030	TRAVEL	Student Travel	$ 2,700.64	$ -	$ -
7026	OTHER	Membership Dues	$ 763.04	$ -	$ -
7032	OTHER	Other Services	$ 1,190.00	$ -	$ -
7214	OTHER	Non-Cap Equip Info Tech	$ 3,080.00	$ -	$ -
7218	OTHER	Supplies: Miscellaneous	$ 1,428.99	$ -	$ -
7347	OTHER	Registration Fees - Non Travel	$ 193.62	$ -	$ -
7601	FACADM	Facilities & Admin Cost Recov	$ 157,711.73	$ -	$ -
7602	FACADM	FACADM Adjustments	$ (0.08)	$ -	$ (0.08)

Compensation Summary							
Name	Most Recent Payroll Date (not including PRCs)	Most Recent PR Amount	Most Recent Fringe Amount	Account Code Type	Most Recent Fringe Rate	Total Posted to Project (Including Errors)	PRC's Posted Project
Last Name, First Name	10/13/2023	$ 973.40	$ 16.55	GRAD-12L	8.60%	$ 30,711.58	$
Last Name, First Name	8/31/2023	$ 1,319.64	$ 113.49	WAGES-12H	8.60%	$ 6,723.52	$
Last Name, First Name	8/31/2023	$ 1,288.35	$ 110.80	GRAD-12L	8.60%	$ 7,773.16	$
Last Name, First Name	8/15/2023	$ 2,169.33	$ 770.11	UCLASS-9MA	35.5%	$ 104,370.41	$
Last Name, First Name	8/31/2022	$ 923.20	$ 74.78	WAGES-12H	8.10%	$ 75,081.95	$
Last Name, First Name	5/31/2022	$ 56.40	$ 3.33	WAGES-12H	5.90%	$ 2,329.38	$
Last Name, First Name	2/15/2022	$ 400.00	$ 23.60	WAGES-12H	5.90%	$ 423.60	$
Last Name, First Name	8/30/2019	$ 730.40	$ 51.86	WAGES-12H	7.10%	$ 13,270.13	$
Last Name, First Name	5/31/2019	$ 833.33	$ 100.00	GRAD-12L	12.0%	$ 35,938.46	$

PROJECT EXPENSE PLANNING

Faculty members are responsible for outlining a spending plan for startup funds with their department chair, and for sharing that plan with their state accountant.

University budget planning for the upcoming fiscal year (for the 12-month period beginning July 1) starts in November. The financial business manager will send out a request to each faculty member with any state projects (dean's professorships, chair accounts, incentives, startups, discretionary accounts, CI accounts, etc.) to begin planning. A planning sheet is included, and planning for each project needs to be sent back within a few weeks so that the FBM can plan for each faculty project alongside department budget planning for the upcoming fiscal year. Guidance and deadlines will be communicated annually.

If no information is provided, FBMs will budget based on trend data.

ADDITIONAL RESOURCES

- Adding Event to Clemson Calendar
- Billing Rates
- Budget-Friendly IT Resources For Faculty And Staff
- Building Security Coordinators
- Campus Reservations and Events
- CECAS Proposal Development Steps
- Clemson Anthology
- Clemson CCIT New Faculty and Staff Guide
- Clemson Directory
- Clemson HR New Employee Guidebook
- Clemson Libraries – Faculty Guide
- Clemson Online Tools
- Clemson Records Retention Schedules
- Conflict of Interest Knowledge Center
- Faculty Affairs – Dates and Deadlines
- Faculty Consulting Policy
- Faculty Evaluations: Annual Review, TPR and PTR
- Faculty Senate
- Faculty Success (formerly DigitalMeasures)
    - Faculty Success Resources
    - Faculty Success User Guide
- Risk Services and Insurance
- Sabbatical Guidelines
- Sample Proposal Templates
- University Policies