

NEWSLETTER

STOCKTON UNIVERSITY | ADMINISTRATION & FINANCE

WHAT'S NEW IN PROCUREMENT, CONTRACTING & RISK MANAGEMENT

- **New Roles:** Robert Yufer will serve as Interim Director of Procurement & Contracting effective June 8, 2022. Additionally, Regina Rosenello will assume oversight of the University's Risk Management functions on the same date. Congratulations Rob and Regina!
- **New Bid Waiver Form:** A new Bid Waiver Request Form is available on the [Procurement & Contracting webpage](#). The new form incorporates end-user feedback and includes the new bid waiver exceptions that were added as part of the amendments to the State College Contracts Law in February.
- **New State Forms:** Several State procurement forms have been updated and are available on the website.

As always, please do not hesitate to contact us with any questions. We are happy to help.

NEWSLETTER HIGHLIGHTS

[WHAT'S NEW IN PROCUREMENT, CONTRACTING & RISK MANAGEMENT](#)

[TRAVEL REMINDERS](#)

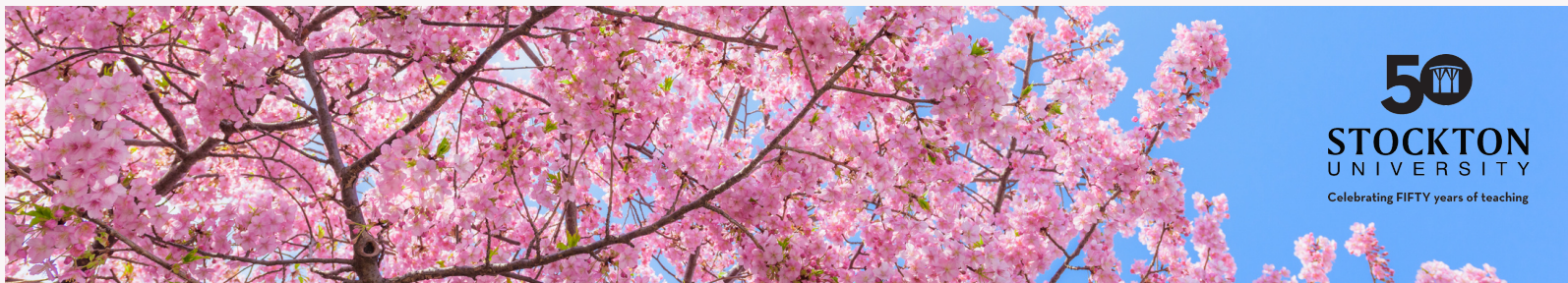
[FISCAL YEAR-END INFORMATION](#)

[MEET THE GRANTS MANAGEMENT POST-AWARD TEAM](#)

[BUDGET & FINANCIAL PLANNING UPDATES](#)

[CAMPUS SERVICES](#)

[GOOD NEWS](#)



TRAVEL REMINDERS

Pcard

All travel in connection with official University business must be approved through the submission of a Chrome River pre-approval report. Once approval is obtained, travelers may request to have their University issued credit card (Pcard) opened by emailing pcard@stockton.edu. Travelers are advised to check the Pcard's balance immediately before travel takes place to ensure that sufficient funds are available. Instructions on how to check your available balance can be found [here](#).

Cancelled Trips & Modifications

Approved pre-approval reports cannot be edited, but comments can be posted and documentation can be attached. If an approved trip is cancelled or if there is a change in travel dates, please notify your supervisor and post a comment regarding the change on the report.

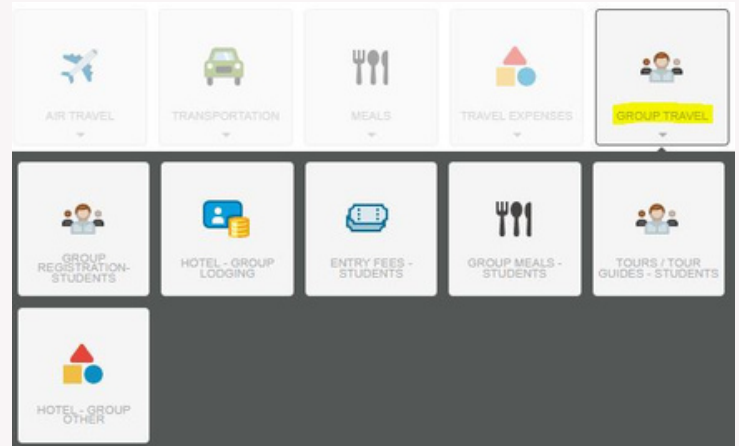
If the amount approved on the pre-approval is exceeded by ten percent due to unanticipated expenses, a letter of explanation detailing the extra expense(s) must be submitted to and approved by the Divisional Executive and Budget Unit Manager.



Group Travel

Employees traveling with students must have a separate pre-approval report completed in their name.

To calculate group travel expenses on a pre-approval report, utilize the "Group Travel" tile.



Candidate Travel

Reimbursement for candidate travel expenses is subject to the same restrictions that apply to reimbursement of employee travel expenses. Lodging should not exceed the regular federal per diem rate for the location. Airfare and hotel expenses should not be paid in advance by the University, but should be paid by the candidate and reimbursed after the visit.

Returned Pre-Approval Reports

When an approver returns a pre-approval to the requestor, the report will appear in the Returned Pre-Approval section of the dashboard. Once the comments regarding the return have been addressed, the report must be resubmitted to complete the approval process.



FISCAL YEAR-END INFORMATION

- **Thursday, June 30th** - Goods and/or services to be charged against the FY22 budget must be physically received by close of business.
- **Wednesday, July 13th (by noon)** - The last day for direct pay documents to be completed and approved by the Divisional Executive with the proper documentation attached.
- **Wednesday, July 13th (by noon)** - Invoices for FY22 goods and services received on/before June 30th must be sent to Accounts Payable for processing. **Year-end expenditure forms** or notation of the date of goods/services received should accompany the request for disbursement.
- **Friday, August 12th (by noon)** - The last day to submit all invoices to Fiscal Affairs to record any FY22 accruals. There will be no exceptions.

Grant Accounting Year-End Reminders

- **Thursday, June 16th** - Grant supplemental payments must be received by the Payroll Department for processing.
- **Friday, June 24th** - Fully executed contracts for outstanding FY22 advanced funding are due to Fiscal Affairs.
- **Monday, June 27th** - Redistributions for Pay Period 13 (June 4 - June 17) are due.
- **Wednesday, July 13th** - Redistributions for Pay Period 14 (June 18 - July 1) are due.

FY22 Merchandise

- When completing receiving for FY22 goods/services, indicate the fiscal year on all documents.
- Attach packing slips and make a comment certifying the fiscal year in which the goods were received.

MEET THE GRANTS MANAGEMENT POST-AWARD TEAM

My proposal was funded, now who do I contact?

Tina Nesbitt- Grant Analyst, Office of Research and Sponsored Projects. Tina is the liaison between the Pre-Award and Post-Award process. She assists with the award set up, awarded budget, and related documentation. Tina also provides assistance with requests for position numbers for TES, student workers, and supplemental payments.

Ann Marie White- Grants Manager, Fiscal Affairs. Ann Marie oversees the accounting and financial management of grants and sponsored programs for the University. She ensures adherence to rules and regulations of funding agencies. Ann Marie provides oversight and guidance to principal investigators, project directors, departmental staff, and end-users. She prepares the Facilities and Administrative rate proposal and assists with the Uniformed Guidance annual audit.

Barbara Foder- Grant Accountant, Fiscal Affairs. Barbara is the newest member of the post-award team. She is responsible for the preparation and submission of financial reports and invoices, and monitoring of expenditures, award close outs, and cash management.

The team is service-oriented and dedicated to the University's research, scholarly activity, and public service.

BUDGET & FINANCIAL PLANNING UPDATES

Budget Transfer Change for FY 2023

Effective in FY 2023, the Office of Budget & Financial Planning will be utilizing budget periods for all budget transfers. For example, starting July 1, 2022, end-users will use the drop-down menu to select the corresponding budget period (01 to 12) when processing an XBDT departmental budget transfer. Training on this topic, as well as other year-end items, will be offered in June.

The screenshot shows a web-based form for processing a budget transfer. At the top, there are fields for Transaction Date (set to MAY 2022), Journal Type (XBDT (Departmental Budget Transfer)), Transfer Amount, and Document Amount (0.00). Below these are fields for From and To, each with sub-fields for Chart, Index, Fund, Organization, Account, Program, Activity, and Location. A Description field and a Budget Period dropdown menu are also present. The dropdown menu is open, showing options from 01 to 13. Below the dropdown are fields for Save as Template (with a Shared checkbox and Complete button), Code Lookup (with Chart of Accounts Code, Type, Code Criteria, and Title Criteria), and Maximum rows to return (set to 10). An Execute Query button is at the bottom.

BUDGET PERIODS	
01	July
02	August
03	September
04	October
05	November
06	December
07	January
08	February
09	March
10	April
11	May
12	June



FY 2023 New Federal Work Study

Position Numbers

Effective in FY 2023, the University will be using new position numbers for the Federal Work Study Program. When creating ePAFs, be sure to use the following new position numbers for your Federal Work Study students.

- Position #900614: Federal Work Study Student (replaces position #900203)
- Position #900615: Federal Work Study Community Service, Off-Campus (replaces position #900204)
- Position #900616: Federal Work Study Community Service, On-Campus (replaces position #900205)

TES & Student Workers - When to Charge Each Account

Students can be charged as a student worker as long as they maintain continued enrollment status.

- This includes the summer and winter breaks.
- They do not need to be charged as a TES over winter break if they will be taking classes in the spring semester.
- They do not need to be charged as a TES in the summer if they will be taking classes in the fall semester.

Examples of when a student worker would change to TES:

- The student graduates or enrollment ends.
- The student elects to take a semester off and will no longer be continually enrolled.

CAMPUS SERVICES

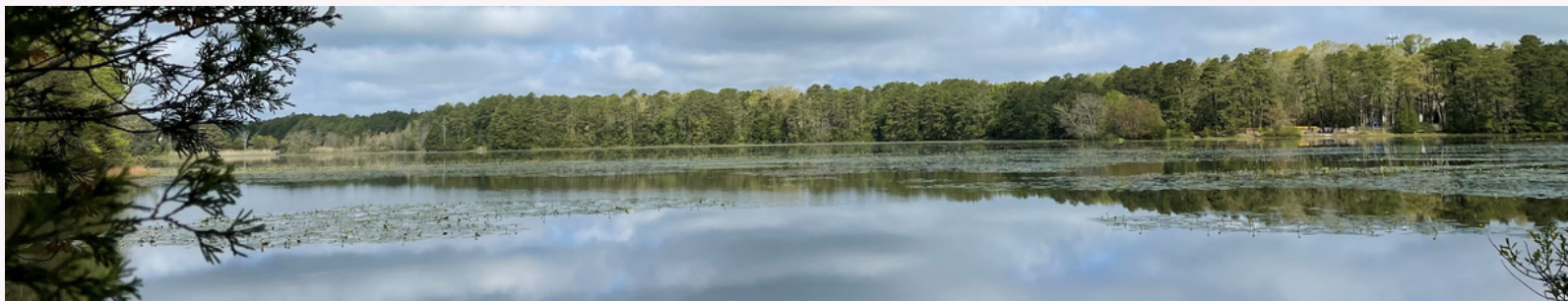
Chartwells

This spring, Campus Services, Chartwells, and the Student Senate worked collaboratively to rename the Food Hall at N-Wing. Student feedback was solicited and after narrowing the list down to the top five submissions, the student body voted. The first students who submitted the top five names were awarded prizes. The new name, **Food Hall at The Nest**, was unveiled on April 19th. Many thanks to the Student Senate for their assistance, and congratulations to the winning students!



Mailroom's Bulk Mailing Procedure

As a friendly reminder, please be sure to provide the Mailroom with at least two (2) weeks' notice for all bulk mailings (500 pieces or more). If you are sending a bulk mailing, you will need to complete the request form found via this [link](#). For full requirements and tips, please refer to the [bulk mailing document](#).



Follett Bookstore

Did you know that you can shop for bookstore merchandise online? You can even choose to pick up your orders directly in the store. Visit the [Follett Bookstore website](#) to see purchasing options and take advantage of the latest sales and discounts.

FACULTY & STAFF APPRECIATION

20% OFF ONE APPAREL OR GIFT ITEM*

FOLLOW THESE EASY STEPS:

- 1) Visit [CampusWelcome.com](#)
- 2) Enter your email address
- 3) Enter access code: **1174**
- 4) Show your coupon email at the register
or use it online for your discount!

CAMPUS CENTER STORE
Campus Center Building
StocktonUshop.com



*See store for details. Restrictions apply.

GOOD NEWS



Dana Engle and her husband Andrew welcomed **Owen Miles Engle** on November 17, 2021!



Kara Lopes and her fiancé Tyeler welcomed **Merrick Tyeler Dimone** on February 3, 2022!

Happy
WEDDING

Jennifer Perchalski
+
Josh Jackson

5.1.2022



Congratulations!

Kimberly Gotthold
on earning her MBA!



**WELCOME
TO THE TEAM!**

Natalie Svec - Natalie is a proud alumna of Stockton University and joined Fiscal Affairs as the Tax Manager on May 23rd. She is a Certified Public Accountant with more than 14 years of accounting and tax experience. Natalie is adept at preparing IRS not-for-profit tax returns and excels at tax and compliance research. Additionally, she has extensive non-profit audit experience, including preparing and reviewing financial statements in accordance with Generally Accepted Accounting Principles. Please join us in welcoming Natalie to the A&F team.