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myEVMS

myEVMS is a portal that provides members of the EVMS community with a single point of access to all the institution's information systems that you will need on a day-to-day basis. The systems include: Blackboard, the EVMS Intranet, Meeting Room Manager, Monarch, Procure Plus, SendIt, Time & Attendance (TAS Web), TurnItIn, VIMS, and Web Mail.

One of the first things you need to do is to set up an account on the myEVMS portal. Go to https://myevms.evms.edu. Click on “Create an Account.” Enter your Network ID and Password and send an email to dbchelp@evms.edu for your account to be activated.

Accounts are created during business hours. Allow one hour for the account creation process. A confirmation email will be sent when your account is created. If you have trouble logging in, please contact the Help Desk at 446-7173 or email dbchelp@evms.edu.

Helpful Hint

- Be sure to create a shortcut to your myEVMS portal account on your computer’s desktop.

Time & Attendance – Your Supervisor; or Nancy Stromann – ext. 6100 or Therese Raunswinter – ext. 6162

Non-exempt employees (employees eligible for overtime pay) are paid by the hour and must record time worked. EVMS has a Time & Attendance software system that allows non-exempt employees to punch in and out on their computers or at stations throughout the campus.

To access Time & Attendance, click on TAS Web in the myEVMS portal.

You will be taken to a screen that says “Employee Self Service” and asks for your Badge/ID and PIN. Your Badge ID is the badge number located on the back of your EVMS ID badge (not your employee number on the front). Your PIN is the last 4 digits of your Social Security Number, less any leading zeros.

Click on the “Punch” icon to record your arrival and departure from work.

Each campus building has a station where you can punch In and Out. The station in ERB is located on the first floor directly off the lobby to the right between the double doors going out to Lewis Hall. It’s posted on the wall with a clock. Simply flash your badge across the bottom of the unit.

To record sick and/or vacation time, log into Time & Attendance:
1. Click on the Activity Tab. The current pay period will be displayed in a calendar format.
2. Go to the day you would like to record time off.
3. Click the blue clock labeled Enter Time Off Hours.
4. Enter the amount of sick or vacation time taken in the amount field.
5. Select the desired pay type in the Pay Designation field.
6. Select the appropriate reason code and click OK.
7. You will receive a message from the system confirming your entry.

**Helpful Hints**

- Check your time sheet on Thursday so adjustments, if needed, can be made on Friday.
- Your supervisor or Nancy Stromann can make adjustments, such as adding missed punches, vacation or sick hours, to your time sheet.
- Stay within 40 hours per week to avoid overtime. Overtime has to be approved by your supervisor prior to working the extra hours.

**Phone & Voice Mail – Christine Butler – ext. 5217**

The Telecommunication Department provides telephone and network cable plant support for EVMS. Email the Telecommunications help desk at: telehelp@evms.edu for any telephone related issues.

**Helpful Hints:**

1. First dial “9” to place a call outside of EVMS.
2. To access the EVMS PhoneMail system, dial x5604 (or 446-5604 when calling from outside of EVMS).
3. To record your greeting: Dial x5604 (PhoneMail)...Enter your extension #...Enter your password #...Press 8 to change answering options...Press 1 to record... Press 1 to re-record...then to record your name: ...Press 8 to change answering options...Press 4 record...Press 1 to re-record.
4. To manually forward your phone to voice mail, press the line key to get a dial tone; dial #914250; then hang up. You should forward your phone to voice mail before you leave work each evening and anytime you leave your desk for an extended period of time.
5. To un-forward your phone, press the line key and dial ##91.
6. To transfer a call, press the check button (✓) at the bottom of the phone set, dial the extension number and announce the call and/or hang up.
7. To adjust the ringer volume: Press the minus sign near the handset. It will show PHONE SETTINGS on the display. Press 1 for ring volume. It will sound and you can adjust as
needed with the plus or minus volume buttons. Then press Enter or the check mark when you have the volume you wish to hear. You can also go through other phone settings like what ringer you would like by using the arrow keys.

The complete Optiset Phone Quick Reference Guide has been published to the Telecommunications Intranet page at:

http://info.evms.edu/telcom/postdocs/referencemateria_/optiseteadvqrg/default.htm

**Photocopying/Faxing/Scanning**

**Photocopying:**

Health Professions has networked printers located in ERB-329:

\ipp://157.21.6.46\Theq_Hp_Xerox_WC5790 (black and white printer, copier, scanner, fax machine)

\ipp://157.21.6.46\Theq_Hp_CljCP3525 (color printer)

The following EVMS networked printers are located in ERB-109. You can print directly to them from your computer or walk down and insert your program’s code:

\EVMS_TREE\PAS_ERB_Bizhub_BW950.ACADEMIC.EVMS (black and white printer – your program is charged 6¢ per page)

\EVMS_TREE\PAS_ERB_Bizhub_C652.ACADEMIC.EVMS (color printer - your program is charged 12¢ per page)

**Faxing:**

The XEROX_WC5790 printer/copier is also a fax machine. The fax number is 757-446-6179.

1. To send a fax, place the documents you want to fax face up into the feed tray.
2. Press the “Services Home” button at the top on the left-hand side of the machine and press the “Fax” icon.
3. Dial the number as you would when you place a call on your office telephone – dial “1” for a long distance fax, then dial “9” for the outside line, dial the area code if long distance, then dial the fax number.
4. Hit the start button to feed the document through the machine.
5. The copier will print a report indicating whether the fax was successfully sent or not.

**Scanning:**

Documents can be scanned to a pdf file and sent to EVMS emails on the XEROX_WC5790.
1. Place the documents you want to scan face up into the feed tray.
2. Press the “Services Home” button at the top on the left-hand side of the machine and press the “Email” icon.
3. Press “New Recipients:” and type in full email address; press “+Add (To:)” and then “Close.” Hit the Start button to feed the document through the machine and send.
4. Or you can type in the first few letters of the email address and press “Search” – then select the name of person you want to email your scanned document from the “Search Results” list. After you select the name, press “+Add (To:)” and then “Close.” Hit the start button to feed the document through the machine and send.

Classroom and Conference Room Scheduling
Meeting Room Manager – Linda Lopez

Linda Lopez arranges access to Meeting Room Manager on your computer. Classrooms and conference rooms are reserved online through this system. When making the reservation you must note if AV equipment and any special room-set are required. Most classrooms and conference rooms are for general use, however the larger classrooms are for “restricted use.” For those restricted use rooms, you need make the reservation through their designated contact person.

Library Study Rooms and Computer Lab
• Go into Outlook’s Public Folders
• Click on All Public Folders
• Click on Brickell Library to view calendars for the Classroom and Lab Schedules and Study Room Schedule in order to check their availability
• If the room is available on your requested day and time, you need to complete a form, found at: XXX

Accounting Codes – What do all the numbers represent?

The EVMS accounting code is a series of numbers in the following format: XXX-XXX-XXXXXX-XXXXXX. You need to assign a code when purchasing items on Procure+, completing a travel voucher or interdepartmental transfer forms, obtaining reimbursements through petty cash, and making cash journal deposits.

The first 3 numbers XXX-XXX-XXXXXX-XXXXXX represent the type of fund the money is coming from:
• 101 – unrestricted (i.e., department/program code – this is the one that is used the most in Health Professions)
• 102 – Internally designated (i.e., reserve account/grants that begin with 8)
• 103 – Private grants (grant numbers that begin with 5 or 6)
• 109 – Federal/State Grants (grant numbers that begin with 1, 2, 3, or 4)

The second set of 3 numbers XXX-XXX-XXXXXX-XXXXXX designates the specific program’s code:

• 129 – Biomedical Sciences
• 137 – Biotechnology
• 138 – Surgical Assistant
• 139 – Ophthalmic Technology
• 140 – Art Therapy & Counseling
• 141 – Medical Master’s
• 142 – Public Health
• 143 – Physician Assistant
• 144 – Health Professions
• 148 – Clinical Embryology
• 149 – Epidemiology & Biostatistics

The first set of 6 numbers XXX-XXX-XXXXXX-XXXXXX designates the object code. Some of the most frequently used object codes are as follows:

• 007301 – Supplies
• 007501 – Employee Travel – Domestic
• 007507 – Printing Cost
• 007583 – Food Purchases – Outside Vendors

A complete list of the object codes can be found on the intranet at http://ishka/financialservices_HTML/chart.txt.

The second set of 6 numbers XXX-XXX-XXXXXX-XXXXXX designates the grant number. If you are not charging to a grant, the last 6 numbers of the budget code will be 6 zeros.

For example: When ordering copy paper for Health Professions, the accounting code would be: 101-144-007301-000000.

Procure+ – Therese Raunswinter

To make purchases use Procure+ It’s worth the time to complete the tutorials offered on the web site. The training videos can be accessed at the very bottom of the Procure Plus home page.
Accessing Procure+:

1. Go to https://myevms.evms.edu
2. Enter your user name and password to login.
3. Click on either Procure+ (IE7) or Procure+ (IE8), depending on what version of Internet Explorer your computer is using.
4. Enter your user name and password for Procure+. Therese Raunswinter, the Financial Systems Manager at ext. 6072, provides the username and password for Procure+.

Creating an Order using “Punch-out to Online Catalogs”

EVMS has online catalogs for orders from Office Max, PSS, and Fisher Scientific.

Click on the dropdown menu (+) by “Create Order” located on the upper left-hand side of the screen.

Ordering from Office Max:

1. Click on Office Max
2. Click on “Create New Office Product Order”
3. Click on the type of product you are looking for under the Catalog column
4. Another list will appear to the right of the Catalog column. Look for the specific item(s) you need to purchase and click on it.
5. Enter the quantity you want for each item.
6. Click “Add to Cart”
7. Click “Continue Shopping” or “Checkout” (NOTE: Items in shopping cart can be removed by clicking on the box under the “select” column to the right of the screen then click on “Remove”)
8. Once you click on “Checkout”, you should get a message that says “Your selection has been added to your shopping cart.”
9. Click OK
10. A confirmation screen will appear that says “Your selection has been added to your shopping cart” and under that the “Go to Shopping Cart” option should appear.
11. Click on “Go to Shopping Cart” and the shopping cart in Procure+ should appear.
12. Click “Accounting”
13. Enter the percentage to be paid by each program. In most cases, 100% of the purchase is paid by one program.
14. Enter the “Accounting Code” based on what was purchased.
15. Click “Save”
16. Click “Checkout” once you have confirmed that the order is accurate. This will take you to the “Order” page.
Submitting the Requisition

1. Click “Printer Friendly” on the Order page. This will take you to a print preview of the requisition and gives you the opportunity to check for accuracy before submitting.
2. Click “Print”
3. Click “Exit”. This will return you to the Order page
4. Click “Submit”
5. “The following Requisition has been submitted” should appear on the screen.
6. If you have been given approval rights for purchases through Procure+, then click on “Approvals” on the tool bar in the upper right corner.
7. Click “Approve” and the screen will say “The approval is scheduled for processing.” You will also receive an e mail asking for and confirming approvals. If you are not an approver, then a request to approve will be sent to the individual that is responsible for the program’s budget.

Completing a Quick Req

Quick Req’s are used for all other expenses, excluding anything that can be ordered using the Punch-out to Online Catalogs.

1. Click on the dropdown menu (+) by “Create Order” located on the upper left-hand side of the screen.
2. Click on “Quick Req” and the Quick Req screen will open

Choosing & Establishing a Vendor:

1. Using all caps, type in the name of the vendor and then click the “Look Up” icon.
2. A new window will open with a list of vendors to choose from. Click on the “Vendor ID” number in the column to the left of the vendor name you are looking for.
3. If the vendor does not appear on the list:
   • Click on the “Look Up” icon.
   • Type ESTABLISH
   • Click on the “Look Up” icon.
   • Choose “ESTABLISH NEW VENDOR-SEE NOTES” – Vendor ID #5001.

Entering Items onto the Requisition:

1. Under “Item” enter a # sign
2. Under “Catalog” choose “Other Source” from the drop down menu
3. In the “QuickReq Description” box, provide any additional information and a description of the purchase, invoice, bill, reimbursement, etc. Be as short and as specific as possible.
4. In the “Quantity” box, enter the number of items or quantity that you want to purchase.

5. In the “UM” box, or units of measure, EA (meaning each) is typically entered here. You can also click on the “Look Up” icon for other unit of measure choices.

6. In the “Unit Price” enter the price per unit

7. In the “UM” box EA is typically entered here. You can also click on the “Look Up” icon for other unit of measure choices.

8. Once all items to be purchased have been entered, Click on “Add to Cart”, which will take you to your the “Shopping Cart”.

9. Click “Accounting”

10. Enter the percentage to be paid by each program. In most cases, 100% of the purchase is paid by one program.

11. Enter the “Accounting Code” based on what was purchased. Click “Save”

12. Click “Checkout” once you have confirmed that the order is accurate. This will take you to the “Order” page.

**“Order” Page**

1. If a new vendor was established, Click on “Additional Information” (See Choosing & Establishing a Vendor under Completing a Quick Req for directions. There is also a tutorial for Establishing a New Vendor in Procure+)

2. In the “New Vendor Information” box in the lower left corner, enter as much information as you have about the vendor, i.e. name, address, phone number, email address, account number, etc.

3. Click on “Notes” and add any additional information needed about the purchase/expense in the “Internal Notes” section.

4. Click Save

**Adding an Attachment**

An attachment can be added to the requisition which may include copies of receipts, invoices, or a scanned PDF file.

1. Click “Attachments” from the Order page

2. Click “Attach”

3. Click “Browse” to find the document you want to attach

4. Click “Attach”

5. Click “Exit”

The attachment will appear on the requisition if attached correctly.

**Submitting the Requisition**
8. Click “Printer Friendly” on the Order page. This will take you to a print preview of the requisition and gives you the opportunity to check for accuracy before submitting.
9. Click “Print”
10. Click “Exit”. This will return you to the Order page
11. Click “Submit”
12. “The following Requisition has been submitted” should appear on the screen.

Helpful Hints:

- If you are submitting a requisition over $5,000, you will also need to complete a “Sole Source” form and either attach it to the requisition or forward it separately to Materials Management. The Sole Source Form can be found on Materials Management’s intranet site at http://info.evms.edu/materialsmgt/postdocs/forms_/solesourceformr-1/solesourceformr.pdf.
- A W-9 form is required for all new vendors

Letterhead/Business Card Ordering

Annual Purchase Orders

Computer Orders: How to order and what you need to remember

Email Materials Management for a quote. EVMS has special rates with Dell Computer. Once the quote is received, forward it to the faculty or staff member for whom you are purchasing the computer to confirm that the specifications in the quote are what they require. Once you get their OK, process a Procure+ requisition to purchase it. You can also ask Mary for her recommendations for a desk top printer.

Other items you need to purchase with a new computer are:

Software – Vendor: CDW Government

- Microsoft Office Professional Plus 2010 License; #2077644; $53.54 ea.
- Adobe Acrobat Professional ver. 10 License; #2223884; $75.64 ea

If you are also ordering a printer, you will need to order USB cable to connect the printer to the computer. The vendor is PC Connection: High-Speed USB 2.0 Cable, A to B, 10 ft.; Item #: 393331; Mfr #: 412123; Cost: $1.93
Travel Vouchers – Kay Erbe

Instructions to Complete the EVMS ELECTRONIC TRAVEL VOUCHER

ADVANCE and CLOSE OUT FORM

When using the ADVANCE form you MUST use the second part of the tab- “ADVANCE and CLOSE OUT”  -  to close out the trip (see instructions below).

The Travel Voucher Identifier is Last Name of Traveler and Date of Departure

EVMS Travel Voucher Top Section:

Traveler: Enter the name of the person that will be traveling

Date Advance Submitted: This is the date traveler submitted the information to the department with all documents necessary to complete travel form and forward for signatures.

Traveler Dept or Address: Enter the dept name and, if non-employee, the travelers address

Dept Contact Name: Enter the name of the person who will be following up on the travel voucher

Contact Email: Enter E-mail address of contact

Contact Phone: Enter phone number of contact

Personal Advance Requested: This amount calculates automatically from the information entered in the ‘Expenses’ section

Traveler Signature: The Traveler must enter their name and date. Confirmation of trip must be from Traveler’s e-mail address. Traveler is verifying the funds will be used for the purpose outlined on travel voucher and failure to submit the final expense report with receipts within 60 days may be subject to a payroll deduction for the amount advanced to them.

Date of Departure: Enter the date of the first day of travel and time of departure

Date of Return: Enter the date you expect to return from travel and time you expect to arrive back

Destination: Enter the City and State/Foreign Country

Purpose of Trip: Clearly state the business purpose of the travel.
Dates of Conf/Meeting: Enter the start and end dates of the conference or meeting attending

Department/PI Approval: The Department Administrator/PI must enter their name and date if approved. Confirmation of approval must be from Department Approvers/PI e-mail address.

Divisional Approval: The Divisional Business Office must enter their name and date if approved. Confirmation of approval must be from Divisional Business Office’s e-mail address.

Travel Advance Request Section: (ALL anticipated business expenses must be listed)

Payment Types drop down menu: (must be selected on appropriate lines)

Click on Payment Type Dropdown –you will see drop down arrow to select from below

A/P - Payable to – Accounts Payable will make a direct payment to the vendor

EVMS P Card paid to – The Department used/will use their EVMS procurement card to directly pay the vendor

Personal Credit Card paid to – The traveler paid the vendor directly and needs a reimbursement to cover the cost

Travel Authorization # to – For Airfare, the traveler may obtain an authorization number from the business office for participating vendors

Cash Advance – Advance requested with no prior payment

Conference/Registration Fees: From the drop down box, select the payment type used to pay for the registration or conference fee. Next to payment type provide the name of Vendor. Enter the amount of the conference in the ‘Estimated Cost’ column. Conference/Meeting back-up documentation to show meeting, location, dates and fees must be scanned and e-mailed with travel voucher (- even if no registration fees are required).

Lodging: From the drop down box, select the payment type to be used/will use to pay for the lodging. Next to payment type provide the name of Vendor. Enter the number of days and the rate per day. The total amount will update automatically in the ‘Estimated Cost’ column. If multiple rates and days, please enter total in ‘Estimated Cost’ column. Lodging confirmation must be scanned and e-mailed with travel voucher.

Airfare: From the drop down box, select the payment type used to pay for the airfare. Next to payment type provide the name of Vendor. Enter the amount in the ‘Estimated
Cost’ column. Airfare e-ticket or confirmation must be scanned and e-mailed with travel voucher.

Per Diem: From the drop down box, select ‘Cash Advance’. Enter the number of days and rate per day for full day per diems per IRS website. The ‘Estimated Cost’ column will update automatically. If you have multiple per diem rates due to various locations please use separate lines. For first day of travel and last day of travel enter 75% of per diem rate.

Deduction of Meals paid for as an option at Conf: Deduct the amount of per diem for any meals purchased as an option at the conference. The percentage to deduct is 20% for breakfast, 20% for Lunch or 60% for Dinner. The amount entered should be a negative number.

Miles: Enter the number of estimated miles driven if using a personal vehicle for trip. The mileage for each day should be from where you started the trip to where you ended it. For local travel mileage this should be only the excess of your normal commute unless on a weekend.

Taxi: Enter the estimate of cash needed in the ‘Estimate Cost’ column for taxi fare while on trip. If paying for a shuttle ride (or something similar) in advance of the trip, please list under miscellaneous.

Miscellaneous: For each eligible expense enter a payment type from the drop down list. Next to payment type provide the name of Vendor and/or description of expense.

Notes: Use this area to provide additional explanation.

Account Code/s to be Charged/Dollar and/or %: Enter the full 18 digit account code/s to be charged for travel, include total dollar amount or percentage.

Total Estimated Cost of Trip: Automatically calculates the total cost of all allowable estimated costs of the trip, advanced or not advanced.

Total Direct Payments to Vendors: Automatically calculates the total of all lines paid for by Accounts Payable, EVMS P Card or Travel Authorization #.

Total Advance to Traveler: Automatically calculates the total of all lines paid/to be paid for by Personal Credit Card/Check, Cash Advance and for per diems, Mileage, Taxi.

Estimated Costs Not Advanced: Automatically calculates the total of all estimated costs not advanced.

Foreign Travel must have the Letter of Approval from the Dean attached and a copy of the Foreign Travel Insurance form. The travel advance form along with the scanned documentation
must be e-mailed to the traveler (if not the person filling out form). The Traveler will then forward the e-mail with their approval of the advance request to the Department Head/PI. The Department Head/PI will then forward the e-mail with their approval to OBMTravel@evms.edu. From there, the Business Office will audit for compliance with EVMS Travel Policy and forward on to OSP/Accounts Payable to process.

You may make of copy of the E.Travel Voucher Advance request form (page 1 only) and attach all documentation as above and obtain all signatures on the travel voucher and mail to OBM in AH, in lieu of scanning and e-mailing.

Once the advance check is processed Account Payable will complete the ‘A/P Use Only’ section and notify the contact person that the advance check is ready or send to the contact person.

**Instructions for Close Out Travel Form – this is the second part of the “ADVANCE-CLOSE OUT” TAB**

Upon return from the trip, the Close Out Travel form must be completed. Most information is carried down from the Advance Form in the Pre Trip Adv. column. The Actual Allowable Cost Column must be completed for each item. For items that were not anticipated prior to the trip, there are lines under ‘Additional Costs During Trip’ that can be completed. Enter the actual amount of the additional costs and, if the items were paid for on an EVMS Procurement Card, enter this amount in the ‘Additional P-Card Charges’ column.

Please note that employees are not allowed to charge any personal items to an EVMS P. Card. However, if NON allowable items were inadvertently charged to an EVMS P.Card (i.e meals at hotel when per diem is claimed, in room movie etc.) these items must be listed in the Additional Cost Section with the Actual Allowable Cost column left blank - then the Amounts charged to the P.Card must be entered in the Additional P.Card Charges column.

You will also need to enter the 18 digit account code information and dollar or percentage for the actual cost of the trip.

Once the form is filled in, you must print the E.TV Close Out Form (page 2 only) and have the traveler and Department Head/PI sign the voucher. The completed form must be sent, along with all original receipts and documentation, to OBM. OBM will audit and forward on to OSP/Accounts Payable to close out the travel voucher.

**THE ABOVE CHARGES AND INFORMATION MUST COMPLY WITH THE EVMS TRAVEL POLICY WHICH IS FOUND ON THE INTRANET UNDER FINANCIAL SERVICES – DOCUMENTATION - POLICIES AND PROCEDURES – SECTION 4.TRAVEL**
Instructions to Complete Travel Reimbursement when NO Advance Form was submitted

The Travel Voucher Identifier is Last Name of Traveler and Date of Departure

EVMS Travel Voucher Section:

Traveler: Enter the name of the person that traveled

Date Submitted: This is the date traveler submitted the information and documents necessary to complete travel form to the department

Traveler Dept or Address: Enter the dept name and if non-employee, the travelers address

Dept Contact Name: Enter the name of the person who will be following up on the travel voucher

Contact Email: Enter E-mail address of contact

Contact Phone: Enter phone number of contact

Date of Departure: Enter the date of the first day of travel and time of departure

Date of Return: Enter the date you returned from travel and time you arrived back

Destination: Enter the City and State/Foreign country where traveled

Purpose of Trip: Clearly state the business purpose of the travel.

Dates of Conf/Meeting: Enter the start and end dates of the conference or meeting attended.

Expense Section:

Conference/Registration Fees: Type the name of Vendor. Enter the amount of the conference in the ‘Actual Allowable Cost’ column. Receipts for Conference/Meeting and informational material must be sent with travel voucher. If paid using EVMS Procurement card, also enter the amount in the ‘P-Card Charges’ column. Conference/Meeting back-up documentation to show meeting, location, dates and fees must be scanned and e-mailed with travel voucher (- even if no registration fees are required).

Lodging: Type the name of Vendor. Enter the number of days and the rate per day for room and taxes. The total amount will update automatically in the ‘Actual Allowable Cost’ column. If multiple rates and days, please enter total in ‘Actual Allowable Cost’ column. Lodging receipts must be sent with the travel voucher. If paid using EVMS
Procurement card, also enter the amount for room and taxes only in the ‘P-Card Charges’ column.

Please note: Employees are not allowed to charge any personal items on an EVMS P. Card. However, if any additional *non-allowable items, i.e. in room movies, meals charged at hotel when per diems are claimed etc. are inadvertently charged to the P.Card the details must be entered in the Miscellaneous section and entered as P.Card charges (nothing would be entered in the Actual Allow Expenses column)

Airfare: Type the name of Vendor. Enter the amount in the ‘Actual Cost’ column. Airfare E-Ticket receipt must be sent with travel voucher. If paid using EVMS Procurement card, also enter the amount in the ‘P-Card Charges’ column.

Per Diem: Enter the number of days and rate per day for full day per diems per IRS website in the ‘Actual Cost’ column. If you have multiple per diem rates due to various locations please use separate lines. For first day of travel and last day of travel enter 75% of per diem rate.

Deduction of Meals paid for as an option at Conf: Deduct the amount of per diem for any meals purchased as an option at the conference. The percentage to deduct is 20% for breakfast, 20% for Lunch or 60% for Dinner. The amount entered should be a negative number.

Miles: Enter the number of actual miles driven if using a personal vehicle for trip. The mileage for each day should be from where you started the trip to where you ended it. For local travel mileage this should be only the excess of your normal commute unless on a weekend.

Taxi: Enter the total in the ‘Actual Allowable Cost’ column for taxi fare while on trip. If paid using EVMS Procurement Card, also enter the amount in the ‘P-Card Charges’ column.

Miscellaneous: For each allowable expense type the name of Vendor and description of expense. Enter the amount in the ‘Actual Allowable Cost’ column. If paid using EVMS Procurement card, also enter the allowable amount in the ‘P-Card Charges’ column. * Also enter in this section any P.Card charges made that are Non Allowable with details – the Actual Allowable Cost column will be zero and the P.Card charges column will be the non allowable amount charged to the card.

Notes: Use this area to provide additional information.

Account Code/s to be Charged - Dollar and/or %: Enter the full 18 digit account code/s to be charged for travel, include total dollar amount or percentage.

Once the travel reimbursement form is fill in it should be printed and signed by the following:

- Traveler
- Department Head/PI
Once the form is signed, the travel reimbursement form along with required documentation and original receipts must be sent interoffice to the Business Office. The Business Office will audit for compliance with EVMS Travel Policy and forward on to OSP/Accounts Payable to process. Once the reimbursement check is processed, Account Payable will notify the contact person that the check is ready.

THE ABOVE CHARGES AND INFORMATION MUST COMPLY WITH THE EVMS TRAVEL POLICY WHICH IS FOUND ON THE INTRANET UNDER FINANCIAL SERVICES – DOCUMENTATION - POLICIES AND PROCEDURES – SECTION 4.TRAVEL

Keep a copy of the Travel Voucher, a copy of all receipts and any other supporting documentation on file in your office for your records.

**Petty Cash – Kay Erbe**

**How to Complete Documentation for Petty Cash**

Petty Cash funds can be requested for expenditure that total $35.00 or less. Petty Cash reimbursements are processed at the Financial Office of Business Management in Andrews Hall, Suite 170. Call Kay Erbe at 446-8433 to ensure that someone is available to process the “Received of Petty Cash” slip and provide the cash reimbursement prior to going there.

**How to complete the “Received of Petty Cash” Slip:**

*(See the example below. NOTE: the numbers below, next to each description for completion, coincide with the attached example)*

1. Do not write in this box. This is completed by the business manager.

2. Enter the date in which the slip was completed in the upper right corner.

3. Enter a detailed description of the expense. If the reimbursement is for food/meals and there were 10 or less people in attendance, then there must be a list of people that attended and what was discussed. For functions with more than 10 people in attendance, then indicate the number of people in attendance and the purpose of the function directly on the slip.

4. Enter the total amount for each receipt attached.

5. Enter the account code to be charged

6. Enter the total amount to be reimbursed.
7. The person that receives that cash from the business manager will sign here.

(1) The faculty member responsible for managing the budget for the program being charged for the expense signs here.

NOTE: The numbers noted on the slip coincide with the numbers written in the directions.

Procurement Card

You may be asked to obtain an EVMS purchasing/credit card for your program’s use. It may only be used for business-related activities and expenses. You will be required to attend a “Business Expense and Procurement Card Training” session prior to receiving your card. The training will outline EVMS’ expense policies by providing guidelines about what type of purchases are allowable expenses, what types are prohibited purchases, and what are the cardholder’s responsibilities.

Policies and Procedures are located on the EVMS Intranet at:

http://info.evms.edu/financialservices/postdocs/policiesandproc_/default.htm

The form to apply for a P-card can be found at:
http://info.evms.edu/financialservices/postdocs/evmsprocurement_/procurementcard-1/default.htm

The Expense Documentation Form that you need to complete with each purchase is at:
http://info.evms.edu/financialservices/postdocs/evmsprocurement_/expensedocument/default.htm

There’s also a form to complete if you lost your receipt (which you don’t want to do):
http://info.evms.edu/financialservices/postdocs/evmsprocurement_/lostmissingrece-2/default.htm

When you receive your monthly statement from Bank of America, staple the documentation forms with receipts for each purchase to the statement. As the cardholder, sign the front of the statement and ask your manager to sign it for verify his/her approval of your purchases.

**VIMS (Visa Information Management System) – Therese Raunswinter – ext. 6072**

If you have an EVMS P-card, you will receive an email reminder from Therese Raunswinter to go online to VIMS to review and reallocate your charges from the previous month. She will provide the link in the email message, but you can also access VIMS through myEVMS. Therese will set you up with an account and a password. Each month you will have to review the charges to your P-card, enter a description of the purchase, and if you provide administrative support for more than one program, reallocate the charge to the appropriate cost center.

**Monarch Reports – Therese Raunswinter – ext. 6072**

The Monarch System provides financial reports to enable programs to keep track of their spending throughout the fiscal year, which runs from July 1 to June 30. The reports are generally one month behind current time. Some of the more useful reports are as follows:

- FSI131_Final – Report comparing budgeted to actual expenses with YTD and monthly variances.
- BU130D – Detailed transaction report of direct costs charged to the program. Expenses are shown by object code and date.
- BU130S – Summary report showing Total Budget, Current FY Expenditures, Outstanding Encumbrances and Commitments, Total Obligated and Balance Available.
FASBE – Therese Raunswinter – ext. 6072

FASBE is a financial information system that contains current information about your program’s financial transactions. You can generate reports that summarize your program’s annual budget, expenditures, encumbrances, total obligated expenditures and the funds still available. You can also view detailed information about what has been spent for a specific object code (such as supplies - 007301, business entertainment - 007514, one-time payments - 007108). Once again, Therese Raunswinter can set you up with an account and will provide some basic training for the type of reports you would most likely need to access.

Computer Help
Email “Comphelp” for assistance in getting a computer set up, connecting to the appropriate drives and acquiring VPN access.

Using Sendit
If you want to send someone a large file that’s too big for ordinary email, simply use the EVMS Sendit server. It allows you to send an email to the desired recipient of your large file and upload the file to a holding server all in one simple operation. The recipient clicks on a web URL in your message, and is presented a link to download your file. It’s that simple.

To use the EVMS sendit capability, follow these steps…

1. go to http://sendit.evms.edu/
2. Enter the email address of your recipient.
3. Click the browse button, select the file you want to transmit and click Open. Please avoid using file names with spaces in them since sendit will see a space as the end of the file name
4. Enter your email address (optional but recommended).
5. Enter a short message to your recipient so they will know what you’re sending (required).
6. Enter the code from the black rectangle into the box on the right (this helps fool spammers).
7. Click the Send Now! button.

You are then presented with a simple web page confirming that the email message was sent and that your file was posted. Your recipient will receive an email message noting that you sent the file, including a link to download the file. The recipient needs do is click the download link in your email message, which launches a simple web page with the download link for your file.
How to Change Your Home Mailing Address via EVMS Human Resources x-4063

1. www.benedetails.com is the website to make address changes
2. EVMS’ portal ID number is 40065
3. Your EID is your employee number not your badge number
4. Password is your date of birth starting with the 4 digits of the year
5. Go to “Select benefits” then choose “Start new enrollment” then choose “Update Address or Dependent Information”

Mail Services – Rick Lowery x-5239

Mail is picked up and delivered twice a day in ERB-109 between 11:30 a.m. – 12 noon and 2:30-3:00 p.m.

A complete list of the EVMS Mail Services pick-up and delivery schedule can be found here: http://info.evms.edu/materialsmgt/postdocs/mailservices /mail2/default.htm

Outgoing mail requiring postage must have our 3-digit department number or grant number indicated on the top left hand corner. Outgoing mail requiring postage should be grouped by rubber band by the department or grant number to be charged. Do not group mail that have different department or grant numbers. For more information about Mail Services, check out: http://info.evms.edu/materialsmgt/postdocs/mailservices /default.htm

Housekeeping – Wallace Lloyd

If you need something cleaned up or an extra table set up, contact Wallace Lloyd at 446-5863; cell phone: 771-9454 or LloydWC@evms.edu

Maintenance

Dwayne Gibboney is the EVMS Maintenance man assigned to ERB. You can email him at MaintERB to request his assistance. Michael Wass is the head of EVMS Maintenance.

How to Request Keys

Contact Pete Kessel at 446-5233 or email at KesselLC@evms.edu
Security

The Police and Public Safety Department is responsible for law enforcement, security and emergency response at EVMS. Additionally, they are responsible for providing services to meet the needs of our EVMS community. Some of these services include:

- Coordinating the Shuttle Service (call x-5199)
- Maintaining a Lost and Found Department
- Assisting campus motorists with minor vehicular problems
- Maintaining the "Rave Guardian" Electronic Escort System

To report a crime or a security emergency while on campus, call the Police and Public Safety Department at x-5911. The non-emergency number is x-5199.