

Eklund, Jennifer

From: Stewart, Jane
Sent: Monday, April 08, 2013 12:46 PM
To: Lawson, Lydia; Beauregard, Tracy; Cantor, Marion; Jackson, Tracee; Eklund, Jennifer; Brown, Lori; Price, Jerri; Furr, Donna; Castle, Marian; Meier, Wendy; LaClair, Stephanie; White, Melanie; Smith, Doreen; Kyper, Oksana; Moose, Robin; Guessford, Bev; Gregory, Cindy; Wallace, Michele; Troutman, LuAnne; Scott, Elizabeth; Watson, Sara; Brown, Kristen; Cresenzi, Melanie
Cc: Brizendine, Tony; Cherukuri, Harish; Ferguson, Ian; Daniels, John; Smelser, Ron; Tolley, Patty; Hocken, Bob; Young, David; Uddin, Mesbah; Ozelkan, Ertunga; Lee, Charles; Enslin, Johan; Johnson, Bob
Subject: BSS Meeting 04/10/2013

Please attend the BSS meeting this Wednesday April 10, 2013 from 3:30 p.m. to 4:30 p.m. Location Duke Hall 324. We will be reviewing an internal travel policy procedure. Also, changes in the RPT process paper copy as well as electronic process. Please let me know if you can attend. Thank you,

Sincerely,

Jane

Jane Stewart | Business Officer
UNC Charlotte | William States Lee College of Engineering- Duke 315
9201 University City Blvd. | Charlotte, NC 28223
Phone: 704-687-8243 | Fax: 704-687-8267
janstewa@uncc.edu | <http://www.coe.uncc.edu>

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Business Services Specialist Meeting
Wednesday, April 10, 2013
3:30 p.m. Duke 324

AGENDA

1. Travel

- a. Internal College of Engineering Travel and Procedures – handout
 - i. Travel policy states 90 days, tax will be charged, COE policy is 30 days to process.
- b. Problem processing travel reimbursements over 30 days
 - i. Schedule an appointment with Dean’s office staff member, Lu-Anne Troutman, Jane Stewart, Jennifer Eklund or Kristen Brown.
- c. Travel Authorization must be completed before the trip date, and includes grants and general funds.
- d. Dean Johnson approves training of available Human Resource workshops, through the university, that will better assist you in doing your job.

2. Reappointment, Promotion & Tenure (RPT)

- a. RPT Checklist for BSS – handout
- b. RPT process will be electronic, upload information in PDF format
 - i. BSS will print out documents and place in provided binders

**Business Services Specialist Meeting
 Wednesday, April 10, 2013
 3:30 p.m. Duke 324**

No.	Name	Sign In
1.	Beastell, Lauren	<i>Lauren Beastell</i>
2.	Beauregard, Tracy	
3.	Brown, Kristen	<i>Kristen Brown</i>
4.	Brown, Lori	
5.	Cantor, Marion	<i>marion cantor</i>
6.	Castle, Marian	<i>Marian Castle</i>
7.	Cresenzi, Melanie	<i>Melanie Cresenzi</i>
8.	Eklund, Jennifer	<i>Jennifer Eklund</i>
9.	Furr, Donna	<i>Donna Furr</i>
10.	Gregory, Cindy	<i>Cindy Gregory</i>
11.	Guessford, Bev	<i>Bev Guessford</i>
12.	Jackson, Tracee	
13.	Kyper, Oksana	
14.	LaClair, Stephanie	
15.	Lawson, Lawson	<i>Lawson Lawson</i>
16.	Meier, Wendy	<i>Wendy Meier</i>
17.	Moose, Robin	<i>Robin Moose</i>
18.	Parker, Lee Ann	<i>Lee Ann Parker</i> new email → L.Parker@uncc.edu
19.	Price, Jerri	<i>Jerri Price</i>
20.	Scott, Elizabeth	<i>Elizabeth Scott</i>
21.	Smith, Doreen	<i>Doreen Smith</i>
22.	Stewart, Jane	<i>Jane Stewart</i>
23.	Troutman, LuAnne	<i>LuAnne Troutman</i>
24.	Wallace, Michele	<i>Michele Wallace</i>
25.	Watson, Sara	
26.	White, Melanie	<i>Melanie White</i>

The William States Lee College of Engineering – Travel Policies and Procedures
Updated: 2/2013

Travel services provided by BSS with:

- a **2-week notice of departure date for state funded travel.**
 - a **3-week notice for grant funded travel.**
1. Department chair must approve travel for faculty and staff.
 2. **Travel Authorization form must be completed before departure** to show that you are in travel status for the university. (www.finance.uncc.edu/forms).
 - BSS will make transportation arrangements. Submit departure and return dates along with a time-window for travel, or provide a selected flight and carrier. BSS will make airline reservations with the carrier or university vendor (AAA), and will arrange pre-payment (P-Card). Rental cars will be reserved and prepaid with Enterprise (Banner 49er Mart; you must report vehicle ID number to BSS for insurance coverage when picking up vehicle). If you are seeking the best price using alternate vendors (e.g., Expedia, Orbitz, etc.), you will need to make your own reservations and charge it to your credit card and get reimbursed upon your return.
 - Provide the conference website to your BSS. The BSS will prepay both the conference registration and your conference hotel (P-Card). If the conference hotel is not available, you will have your choice of one alternate hotel. **We will prepay hotel, registration fees, and provide you a travel advance for meals, taxi, tolls and other miscellaneous charges.** If you are seeking the best price or an alternate hotel, you will need to make your own reservations and charge it to your credit card and get reimbursed upon your return. Please read below for required original receipts.
 - Note: if you made any prepayments on your credit card prior to submittal of the travel authorization you will be able to get them reimbursed before your departure if you have submitted the authorization 3 weeks in advance.
 - BSS will provide you with a folder for receipts which upon your return you submit to your BSS for reimbursement. To avoid any additional taxes charged to you from your salary for delayed travel reimbursement beyond 30 days, it is imperative that you have your **receipts turned in within two (2) weeks** (preferably sooner). **After 30 days, tax will be charged by the university (IRS requirement).** If the travel advance exceeds expenses, you must reimburse the university after returning.
 3. **Original receipts required are:**
 - Itemized Hotel Bill
 - Taxi Receipts (note destination)
 - Baggage Receipts

The William States Lee College of Engineering – Travel Policies and Procedures
Updated: 2/2013

- Toll/Shuttle/Bus Receipts
- Rental Car Receipts
- Airport Parking
- Internet Expenses
- International Expenses – include conversion chart www.OANDA.com

Be sure your name is on each receipt (in case of lost, it can be identified).

Services provided with only 7 day notice of Departure Date.

1. Department chair must approve travel for faculty and staff.
2. BSS cannot provide any further assistance with this short notice.
 - **Travel authorization** is still required before departure date and should include copies of registration, hotel and flight information.
 - BSS will provide you with a folder for receipts which upon your return from your trip will go to your BSS for reimbursement.
 - The College of Engineering wants you to avoid any additional taxes charged to you from your salary for delayed travel reimbursement beyond 30 days. It's imperative that you have your **receipts turned in within two (2) weeks** (preferably sooner). **After 30 days, taxed will be charged by the university.** If the travel advance exceeds expenses, you must reimburse the university after returning.
3. **Original receipts required are:**
 - Itemized Hotel Bill
 - Taxi Receipts (note destination)
 - Baggage Receipts
 - Toll/Shuttle/Bus Receipts
 - Rental Car Receipts
 - Airport Parking
 - Internet Expenses
 - International Expenses – include conversion chart www.OANDA.com

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The William States Lee College of Engineering

RPT CHECKLIST

Required for submission to the Provost – for ALL RPT's

A 11/2 inch binder will be provided to candidates with tab index by the department

- AA-20
- AA-27 Affirmative Action Form
- Current Vita (format at <http://coe.uncc.edu/faculty-and-staff/policies-and-procedures>)
- Candidates Self-Assessment
- Dean recommendation letter to Provost addressing teaching, research, and service
- CRC recommendation letter to Dean addressing teaching, research, and service
- Dept. Chair recommendation letter to Dean addressing teaching, research, and service
- DRC recommendation letter to Dept. Chair addressing teaching, research, and service
- Program Review Committee (PRC) recommendation to DRC (Systems Engineering only)
- Copies of Annual Reviews since last RPT review/appointment.
- Summary Table of External Reviewers Credentials and Contact Information.
- External Reviews -- optional for initial Reappointments
(external review letters solicited by DRC/Chair only)

Required for Review Committees

- Teaching Evaluations (scores, student comments and peer reviews)
- Include copies of three publications for review.

Please forward folders for each RPT case containing only the above items in order with index tabs provided.

Review Committees and administrators may request additional information during the review process.