“How to” at VSU
A Quick Guide for Budget Managers

Valdosta State University
Financial Services
Welcome to How to at VSU. Within these pages is information to help you accomplish your responsibilities as a budget manager. This guide is intended to give you some basic information you need to start a task. It also provides a link and a contact number to assist in answering additional questions you might have that are outside the scope of this guide.

VSU’s Department of Environmental and Occupational Safety has created a very thorough Emergency Quick Reference Guide that covers the many types of emergencies that may occur on a college campus. It also includes detailed instructions on how to handle these emergencies as safely as possible. It can be located at the following link:

[Emergency Quick Reference Guide]

Environmental and Occupational Safety contact number: 229-293-6171

How to Get Started Online at VSU

VSU uses many online systems to conduct day-to-day business. These systems will require you to have Active Directory and/or Employee Self Service access. If you need help with Active Directory please contact Information Technology. If you need help with Self Service please contact Human Resources.

Information Technology contact number: 229-245-4357

Human Resources contact number: 229-333-5709

How to Use Your Budget at VSU

Each department at VSU is granted a budget at the beginning of the fiscal year. It is the responsibility of the Budget Manager to utilize these funds in a way that allows their department to achieve its goals while at the same time adhering to the policies set by the State, USG, and the institution that governs the use of these funds. Your budget is your authority to spend. It needs to accurately reflect your spending plans.

In order to use your budget you will need to understand chartstrings. Please see the next topic for an explanation of them. Some of the information and forms that will be necessary to successfully perform your budgeting duties are:

- Excel Budget Tracking Worksheet
- Budget Deadlines
- Personal Services Estimator Worksheet
- Online Budget Reports

Your budget analyst can help you with many aspects of successful budget management. If you do not know who your budget analyst is, that information can be found through the following link:

[Budget Analyst Contact by Department]

The responsibilities and authority of a Budget Manager include but are not limited to the following:

- Submitting timely Goals and Action plans for their department to accomplish the University’s goals as defined by the Strategic Planning process
- Regularly reviewing the unit’s budget(s) and submitting timely amendments as needed
- Ensuring the effective and timely use of budget allocations, consistent with the University’s Strategic Goals, while not exceeding the established allocation.
- Adhering to State, USG and institutional purchasing and human resources policies in accomplishing these activities.
Basic Budget Review should include:

- At the beginning of the fiscal year establish an annual plan for the department’s activities and estimate what resources and scheduling will be required to accomplish their plans. One tool for the Budget Manager to use is the Department Budget Tracking Worksheet included with Resources below.
- Review monthly reports, report discrepancies and make timely amendments
- Communicate with department members regarding budget priorities and progress
- Communicate with Dean and/or Vice President to keep them current regarding the changes in needs and the impact for the school’s or division’s goals
- Meet year-end deadlines for purchases, etc.

When funds need to be moved within a department or across departments in the same fund this can be done through the use of a budget amendment. Funds cannot, however, be moved from one fund to another. Information on how to fill in a budget amendment as well as the amendment form with examples can be found at the following location:
Budget amendment information
Budget Services contact number: 229-333-5710

How to READ A CHART STRING at VSU
A chart string is the map for where the budget is coming from or going to. There are many places where you will find chart strings such as the schedule G, the schedule G-1, the Business Intelligence Tool, and budget amendments. Each chart string is generally made up of five parts: Fund, Department, Program, Class, and Account. If you are dealing with funds from a grant, there will also be a Project ID in the chart string. One thing to keep in mind while working with chart strings is that budgets are at a different level than transactions. For example, your budget for supplies is on your 700000 line, but the account you would use to order the supplies is 714100. A webpage with further information about chart strings can be found at the following link:
Chart strings
Accounting contact number: 229-333-5708

How to Obtain and Use a Purchasing Card at VSU
To obtain a purchasing card you must first read the Purchasing Card Procedures.
Purchasing Card Procedures
Then you must complete and submit the Online Purchasing Card Orientation.
VSU Purchasing Card Online Orientation
Finally, you will need to print and complete the Purchasing Card Application and send the completed form to Procurement & Contract Services.
Purchasing Card Application
For more information about the use of the purchasing card and access to the tools that will allow you to successfully use your purchasing card please follow the link below:
Purchasing Card Information
Beverly Amiot, P-Card Coordinator: 229-245-4393
Procurement and Contract Services contact number: 229-333-5708

How to Purchase Supplies and Other Items at VSU
The Department Head or the Budget Manager for each department will determine who is granted shopping and requesting privileges in their area. Once an employee has been granted these rights, they
will need to determine which method of obtaining their purchases is most appropriate. If an item is available through the Central Warehouse, it must be purchased there. If it is not available through the Central Warehouse, the next place to check its availability is through state and agency contracts and state mandatory sources. These resources can be found through the following links:

Georgia Enterprises for Products and Services (GEPS) Mandatory Items

If an item or service is not available from any of the state approved sources, it is considered an open market purchase. Open market purchases that do not exceed $5,000 may be made using a purchasing card. Purchases that do exceed $5,000 must be subjected to a bidding process. The following link contains further information about the purchasing requirements at VSU:

Purchasing Guidelines

eProcurement is a module in PeopleSoft Financials that creates electronic requisitions and routes them for approval. The GeorgiaFIRST Marketplace is an online shopping site that is accessed through PeopleSoft Financials. Through this portal you can shop for contract items from state and institution approved vendors. After you have made your purchasing choices and have placed the desired items into an online shopping cart, purchasing will turn your cart into a purchase order. If you desire to cancel all or part of an order that has already been sent to purchasing, that action can only be done by a buyer. To facilitate a cancelation of an order you must contact purchasing through their email address:

Catherine Storey email: cstorey@valdosta.edu
JoAnn Bryant email: jbryant@valdosta.edu

Procurement & Contract Services – Purchasing contact number: 229-333-5705

Before making any purchasing choices, it is vitally important that you ensure there is sufficient budget available to cover your purchases. You must confirm the budget availability by checking your 700000 line of your budget for purchases less than $5,000 and the 800000 line for purchases of $5,000 or more. ePro will check for available budget before letting the order through to processing. If there is a lack of available funds your order will not go through. More information on eProcurement and GeorgiaFirst Marketplace can be found through the following link:

Procurement & Contract Services

Procurement and Contract Services contact number: 229-333-5705

How to Travel at VSU

Before arranging for any travel, be sure that there is sufficient budget available to cover the expense. The amount of available budget can be checked by looking at your 600000 line. Information on travel procedures that must be followed at Valdosta State University can be found at this location:

Travel Guidelines.

Some of the forms and websites you will need are linked below:

Travel Authorization Form
Travel Cost Comparison - Car
Georgia Government Vehicle Liability Insurance Identification Card
Georgia State Tax Exemption Certificate
Prepaid Conference Registration

A fuel card is located in every VSU operated vehicle. It must be used to purchase all fuel for the vehicle. To use the fuel card you will need to have a driver ID PIN. The below links will lead you to the application for a driver ID PIN and more information on the use of a fuel card:

Driver ID PIN Application
Fuel Card Procedures
Upon completion of your travel you will need to log into PeopleSoft Financials and fill out an Expense Report. This report must be submitted within 60 days of the completion of your travel and can be found under the self-service tab. A hard copy of your expense report along with your receipts for expenses and a copy of your travel itinerary must also be turned in to your travel approver. This person will instruct you as to the procedures your specific office follows for expense reimbursement.
Financial Services contact number: 229-333-5708

How to Hire Employees at VSU
It is possible that during your time at VSU the hiring of personnel may be your responsibility. This may include hiring for student employee positions, staff positions, and faculty positions. When hiring a faculty member, you must have preauthorization from the VP of Academic Affairs. For all other employees, please contact HR before proceeding with any hiring actions. A helpful resource that will walk you through the posting of a job and the hiring process is:
People Admin User's Guide
If you have problems accessing this feature of People Admin, it may be because you are not set up with hiring privileges in the system. If you continue to have problems accessing this part of the system contact HR or your Department Head. Before you will actually be able to undergo the process of hiring someone, you must upload a signed budget amendment along with the request to hire someone for a position to PeopleSoft Financials. Once you are ready to post an open position, be sure that you have the correct position number and classification for the position. The position number can be found in the Schedule G-1 at this location:
Online Reporting Manager
If you are not sure of the classification of the position, please contact HR for this information.
More information on the requirements that must be followed when hiring employees can be found at the following link:
Hiring Process
Human Resources contact number: 229-333-5709
VP Academic Affairs: 229-333-5950

How to Use Payroll at VSU
Payroll at VSU is handled on either a monthly or bi-weekly basis. The frequency of an employee’s pay is determined by their job code. Bi-weekly employees start their pay period at 12:01 am Saturday and it runs for fourteen consecutive days ending at 11:59 pm Friday. Pay dates for both monthly and bi-weekly employees are listed on the Employee Payroll website. If you are asked to review/approve leave accruals you should receive a notification when the leave reports are available from Human Resources. This report is used to reconcile employee’s annual and sick leave. If you feel that you should be getting this notification and are not, please contact your department head or Human Resources. Information on the eTime and on-line Time Clock systems that are used to track employee work hours can be found on the Payroll website. If you think you should be approving time for payroll but do not have access to do so through these systems, please contact Human Resources. Any other questions you or your employees may have concerning their pay, hours worked, or benefits can be directed to Shared Services.
etime and On-line Time Clock
Shared Services
Employee Payroll
Payroll contact number: 229-333-5708
How to Find Policies and Procedures at VSU
The Human Resources department at VSU maintains an Administrative Practices Manual. This manual contains information on employee benefits, leave, payroll, and many other pertinent subjects. The manual can be accessed through the following link:

VSU Human Resources Administrative Practices Manual

The Board of Regents also has a policy manual that may be helpful. It can be found at the following link:

Board of Regents Policy Manual - University System of Georgia

How to Use the Mail Services at VSU
VSU maintains a campus-wide mailing address for all incoming mail and packages. Deliveries will be made to each department on a daily basis. Mail being sent out by each department will be picked up at the time the daily delivery occurs. Campus mail will affix postage to all official VSU mail as long as it has a VSU return address and a plus four code from the sending department. All letters and packages must be accompanied by the following form:

Letter and Package Form

Further information on the services offered by and the regulations of the Campus Mail Department can be found at the following link:

Campus Mail

The official mailing address of VSU is as follows:

1500 N. Patterson St.
Valdosta, GA 31698

Remember to add the plus four of your department to the 31698 zip code. If you do not know the plus four code for your department, please contact Campus Mail.

Campus Mail contact number: 229-333-5672

How to Use Creative Services at VSU
Creative Services is an in-house design studio that provides campus clients with assistance using the campus seal and logo in official VSU projects. They handle all of the stationary and mailer printing needs for VSU. Creative Services offers the following help:

Web Services Contact number: 229-259-5147
Video Production Services Contact number: 229-333-7315
Printing and Copying Services Contact number: 229-333-2162

How to Use Physical Plant and Facilities Planning at VSU
Occasionally things will need repair or maintenance in your department. Physical Plant's responsibilities include the operation of the campus utility systems, maintenance of roads and grounds, as well as building maintenance and custodial services to academic, administrative, and other University facilities. Should you find yourself in need of their services, you must submit a Work Order Request. When submitting this request you will need to know the building and room number where the service is needed.

Work Order Request
If you have an emergency need for custodial services, you may submit your request to Work Management between the hours of 8:00 am and 4:30 pm. After hours emergencies are handled through Public Safety.

Physical Plant and Facilities contact number: 229-333-5875
Work Management: 229-333-4860
Public Safety: 229-259-5555

How to Use Information Technology at VSU
The Division of Information Technology provides and supports many of the applications and hardware used every day by students, faculty, and staff at Valdosta State University. Supported technologies include anything from electronic accounts such as email and Banner registration, to office and classroom computers, to wireless Internet and printing. IT delivers a number of end-user services by providing a front-line helpdesk, technicians, self-help resources, and training. The Helpdesk can be accessed through email or phone.

helpdesk@valdosta.edu
IT Helpdesk: 229-245-4357

How to Use Web Services at VSU
Part of the responsibility of a Budget Manager is ensuring the department website is maintained and kept up to date. VSU uses the Cascade program to achieve this goal. In order to be able to use Cascade, you must first attend a training class.

Register for Cascade Training
Web Services: 229-333-7315

How to Use Employee & Organizational Development at VSU
The Employee and Organizational Development Department is primarily a resource unit to assist employees to achieve University goals, realize career ambitions and enhance personal job satisfaction levels. The Employee and Organizational Development provides ongoing programs to orient, train, and develop employees, thereby improving skill levels, promoting personal career growth, and optimizing employee performance. To see what training is being offered and to register for training you can access their information through the following link:

Training Information
Employee & Organizational Development: 229-259-5105

How to Find More Information to Help You be Successful at VSU
In the course of your job duties you may have additional questions. The resources listed below may be helpful in answering those questions.

Board of Regents Academic Affairs Handbook
University System Academic Advisory Committee
VSU Faculty Handbook
Council On Staff Affairs (COSA)
Frequently Requested Contact Information

Your Notes at VSU:
Appendix A

VSU Travel Procedures

1. Traveler submits travel authorization form (T-Author) under STANDING Authorization within Georgia.

2. Select method of travel.

3. Select lowest cost and most efficient airline.

4. Print the flight search webpage for flight cost comparison documentation.

5. Make reservations with Acumatica Services. Use fuel card with vehicle and your driver's ID (available from purchasing services) to purchase gas.

6. Will employee use VSU car?
   - YES: Use personal car for reimbursement at Tier 2 Mileage rate.
   - NO: Use car cost comparison tool to determine most efficient method.

7. Is VSU car available?
   - YES: Use personal car for reimbursement at Tier 2 Mileage rate.
   - NO: Purchase ticket. Note: The most economical flight should be chosen.

8. Will employee use rental car?
   - YES: Upon return, submit expense report through Employee Self Service. Send a copy of the report, approved by your supervisor, with original receipts, and the car cost comparison to Accounts Payable. File an expense report within 60 days of return from trip.
   - NO: Use personal car for reimbursement at Tier 2 mileage rate.

9. Is rental car less expensive?
   - YES: No action required.
   - NO: Use personal car for reimbursement at Tier 2 mileage rate.

NOTE: This is a summary of procedures only. Please refer to the institution's travel website at http://www.valdosta.edu/administration/finance-admin/financial-services/faculty-staff/travel.php for complete and official instructions.

CAUTION: *P-Card cannot be used for travel
   *Per diem miles apply
   *Present "Certificate of Exemption of Local Hotel/motel Excise Tax" upon arrival at hotels in Georgia.
   *1 and last day travel – 75% of allowable per diem