

FLMNH New Employee Welcome Packet

*Inspiring people to care
about life on Earth*



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Important Contacts

FLMNH Director's Office

Douglas Jones	Director & Curator	273-1902
Beverly Sensbach	Associate Director	273-1900
Griffin Sheehy	Assistant to the Director	273-1901

Budget and Human Resources Staff and Responsibilities

Darlene Novak	Assistant Director	273-1909	Grant Proposals, Post-Award, Budget Info
Barbara Hackett	Office Manager	273-1909	Post-Award, Budget Info
Chris Pickles	HR Manager	273-1909	HR, Recruitment, Grant Proposals
April Johnson	Payroll/HR Processor	273-1908	HR, Payroll, J-1 Applications
Robb Stokes	Travel/Purchasing Processor	273-2111	Travel, Purchasing
Shuronna Wilson	Travel/Purchasing Processor	273-1904	Travel, Purchasing
Pamela Atwell	P-Card Processor	273-1905	Pcard

Office of Museum Technology

OMT Staff: <http://www.flmnih.ufl.edu/omt/staff/>

Help Desk: <https://int.flmnih.ufl.edu/helpdesk/> - or 352-273-1824

Parking

Faculty and staff who want to park their car on campus must have a parking decal.

Decal enforcement is 7:30 am – 4:30 pm weekdays.

Types of decals available for purchase:

ORANGE – available to faculty and staff.

GREEN (Staff Commuter) – available to faculty, staff, full-time OPS and part-time OPS employees not affiliated as a student.

CARPOOL – Available to faculty and staff. Allows holder to park in Carpool zones.

MOTORCYCLE/SCOOTER – Available to all members of the UF community

Where and how to purchase:

You can purchase a decal at UF Transportation and Parking Services located on Gale Lemerand Drive. Be sure to have your Driver's License and your vehicle's license plate number with you when purchasing your decal.

Dickinson Hall:

Faculty and Staff with an **ORANGE** decal can park in the lots adjacent to the museum, or the parking garage on the corner of the Newell Drive and Museum Road. Anyone with a **GREEN** (Staff Commuter) decal can park in the commuter lot off Gale Lemerand Drive. Contact April Johnson or Pam Dennis with questions.

Powell/McGuire Hall:

Both the main parking lot and garage adjacent to the museum will accept **GREEN** or **ORANGE** decals. **GREEN** decals are cheaper and are recommended if your primary work location is Powell/McGuire Hall. Contact Kathy Gerard with questions.

More detailed information about the UF Transportation and Parking Department can be found on their website at: <http://www.parking.ufl.edu/pages/transcommopt.asp>

GatorLink Account Creation

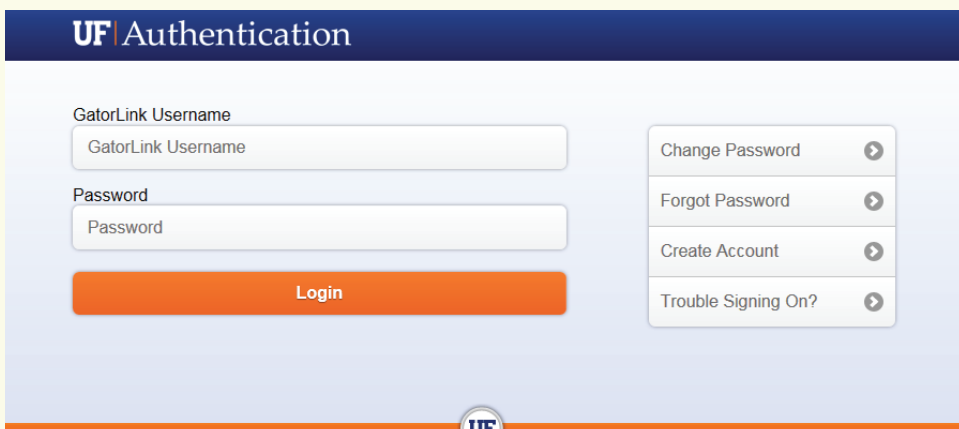
If you haven't already done so, you must establish a Gatorlink account.

GatorLink is an individual's computer network identity at the University of Florida. Every applicant, student, faculty and staff member is expected to have a GatorLink username and password.

You will need your GatorLink user name and password to access your personal information on the University's website <http://my.ufl.edu>

Steps to Obtain a GatorLink ID:

- 1) To create a new account, you will first need to navigate to <https://login.ufl.edu/idp/Authn/UserPassword>
- 2) You will see the UF Login page, select the "Create Account" link.
- 3) You will need your UF ID, Last name, and date of birth to get started.
- 4) Follow the prompts to create your account.

The image shows a screenshot of the University of Florida (UF) Authentication login page. At the top, there is a dark blue header with the text "UF Authentication" in white. Below the header, the page has a light blue background. On the left side, there are two input fields: "GatorLink Username" and "Password", both with placeholder text. Below these fields is an orange "Login" button. On the right side, there is a vertical list of links: "Change Password", "Forgot Password", "Create Account", and "Trouble Signing On?". Each link has a right-pointing arrow icon. At the bottom center of the page, there is a small circular UF logo.

Please go to <http://www.gatorlink.ufl.edu> for more information.

University/Museum Identification



Gator 1 Card:

The University identification card is also called the “Gator 1” card. It is your official university picture ID. The museum will pay for your first Gator 1 card (for permanent employees only).

To obtain the ID you will need to be given authorization by April Johnson/Pam Dennis/Chris Pickles. Once you have been given authorization you will go to the Reitz Union Welcome Center on Museum Rd. The ID Card Services office is on the 1st floor (floor above ground floor, up the stairs to the right). Please note that presenting a valid Gator 1 Card will allow you to ride any RTS bus fare-free.

For more information on the Gator 1 card please visit:

http://www.bsd.ufl.edu/IdCard/Gator1C_info.asp



FLMNH Staff ID Badge:

The Museum has it's own staff badge that must be worn at all times in Dickinson Hall and Powell Hall.

All visitors must sign in at the front desk and receive a name badge.

For questions regarding FLMNH ID Badges, please contact:

Dickinson - Pam Dennis 273-1941 or Barbara Hackett 273-1903

Powell/McGuire - Kathy Gerard 273-2029

Building Maintenance

Work order requests can be submitted on the intranet at: <http://int.flmnh.ufl.edu/building/>

Dickinson:

George Hecht 273-2106

Powell:

Jeff Hansen 273-1898

McGuire:

Jim Schlachta 273-2008

Some problems may need to be called into the Physical Plant Division at the University. Your contact person will handle those situations.

How to Fill Out Your Timecard

Timecards are only for those employees that are classified as “non-exempt” or “hourly.”

Anywho, Joe Bob				1234-5678				560100100				06394A				10/23/2014					
				UFID								POSITION NO.				ENDING DATE		TKL	ASSIGN ID	P/R ID	
1ST WEEK								2ND WEEK								Earned Hrs.		1ST WEEK		2ND WEEK	
	Fri	Sat	Sun	Mon	Tue	Wed	Thu		Fri	Sat	Sun	Mon	Tue	Wed	Thu		Hours	Hours			
	10/10	10/11	10/12	10/13	10/14	10/15	10/16		10/17	10/18	10/19	10/20	10/21	10/22	10/23			1	40	1	40
In	8:00			8:00	8:00	8:00	8:00	In	8:00			8:00	8:00	8:00	8:00	Holiday (H)	2		2		
Out	12:00			12:00	12:00	12:00	12:00	Out	12:00			12:00	12:00	12:00	12:00	Pers. Hol (PH)	3		3		
In	1:00			1:00	1:00	1:00	1:00	In	1:00			1:00	1:00	1:00	1:00	Vacation (V)	4		4		
Out	5:00			5:00	5:00	5:00	5:00	Out	5:00			5:00	5:00	5:00	5:00	Admin Lv. (A)	5		5		
In								In								Sick Lv. (S)	6		6		
Out								Out								Spec Comp (SCU)	7		7		
Total	8.00			8.00	8.00	8.00	8.00	Total	8.00			8.00	8.00	8.00	8.00	Over Comp (OCU)	8		8		
<small>I confirm that the hours shown on this card accurately reflect time worked or to be worked and/or time earned for pay purposes during the period indicated. I understand that falsification of this time worked and/or leave record is cause for immediate dismissal. To be worked hours shown on this card will be adjusted, if necessary, on the next payroll.</small>								<small>I confirm that this employee's effort has been expended on the account shown hereon equal to effort required for compensational purposes, except where the activity reports may reflect effort in another account.</small>								TOTAL		40.00		40.00	
																Spec Comp (SCE)		9		9	
																Over Comp (OCE)		10		10	
																LWOP		11		11	
EMPLOYEE'S SIGNATURE								SUPERVISOR'S SIGNATURE													
University of Florida								TOTAL PAY PERIOD HOURS		Regular Hours		Overtime Hours		Type		Reason		Terminal Lv Hours		Differential Hours	
								80.00													
Included Employee Time Card																					

TEAMS non-exempt, USPS and OPS employees must complete, sign, and submit their time cards to their supervisor for signature and approval in order to receive payment for wages. Willful falsification of time cards is cause for immediate dismissal. Employees should enter the actual time they started and stopped on the time card for each scheduled work day of the pay period. Always use pencil when filling out your timecard. All hours worked must be totaled at the end of the work day and the total shall be rounded to the nearest quarter of an hour stated in minutes in accordance with the table below:

Minutes Worked

0-7 minutes
8-22 minutes
23-37 minutes
38-52 minutes
53-60 minutes

Round to

00 (ex. 8:05 = 8:00)
15 (ex. 8:20 = 8:15)
30 (ex. 8:35 = 8:30)
45 (ex. 8:50 = 8:45)
60 (ex. 8:55 = 9:00)

TIMECARD DEADLINE

Timecards are due in the BHR Payroll Office, Dickinson Hall Room 276 every other Tuesday *(unless otherwise indicated)*.

Failure to turn in time cards in a timely manner may result in a delay of at least two weeks in receiving your pay check. Sign your time card **IN PEN** and get your Supervisor's signature approving your hours worked.

Application for Leave

TEAMS Employees and Leave accruing faculty are required to complete the Application for Leave form when reporting leave used. The Application for Leave form can be found at <http://hr.ufl.edu/wp-content/uploads/forms/leave/leaveapplication.pdf>

UNIVERSITY of FLORIDA		APPLICATION FOR LEAVE	
<input type="checkbox"/> Academic Personnel	Today's Date		
<input checked="" type="checkbox"/> TEAMS	Employee's UFID		
<input type="checkbox"/> USPS	Employee's Name		
<input type="checkbox"/> OPS*	Division/College		
*Without pay only. Required only for FMLA events. Depts may use for other purposes.		Department/Section	
Date/Time of Absence	Beginning: Date _____ Time _____	Ending: Date _____ Time _____	
FMLA-Qualifying Event?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Entitlement Year Start Date _____	
Total Hours Absent: _____ (Round to quarter-hour increments: .25, .50, .75, as appropriate)			
Indicate type of leave requested. More than one type of leave may be entered on the application if used during the same period of absence (e.g., 6 hours of vacation and 2 hours of sick leave).			
PLEASE CHECK THE TYPE OF LEAVE YOU ARE REQUESTING:			
Type and Amount of Leave		Type and Amount of Administrative Leave	
<input type="checkbox"/> Vacation		<input type="checkbox"/> Jury duty/court witness	
<input type="checkbox"/> Sick (Employee)		<input type="checkbox"/> Elections	
<input type="checkbox"/> Sick (Family)		<input type="checkbox"/> Military training, short-term	
<input type="checkbox"/> Workplace Injury Leave (First 40 hours of work-related injury)		<input type="checkbox"/> National Guard	
<input type="checkbox"/> Regular Compensatory Leave (Exempt USPS only)		<input type="checkbox"/> Military exams	
<input type="checkbox"/> Special Compensatory Leave (Exempt and non-exempt USPS and non-exempt TEAMS. Employees receiving workers' comp salary payments NOT eligible)		<input type="checkbox"/> Natural disaster	
<input type="checkbox"/> Overtime Compensatory Leave (Non-exempt USPS and TEAMS only. Cannot be counted toward FMLA entitlements.)		<input type="checkbox"/> Civil disorder	
<input type="checkbox"/> Personal Holiday (Permanent USPS)		<input type="checkbox"/> Athletic competition	
		<input type="checkbox"/> Formal investigation	
		<input type="checkbox"/> Disabled Veteran treatment	
		<input type="checkbox"/> Death in immediate family (USPS and TEAMS only)	
		<input type="checkbox"/> Extraordinary circumstances (Must be authorized by Div. Hum. Resources)	
		<input type="checkbox"/> Florida Disaster volunteer	
Type of FMLA Event (If Applicable)		Leave Without Pay*	
<input type="checkbox"/> Parental leave		<input type="checkbox"/> Authorized	
<input type="checkbox"/> Medical leave		<input type="checkbox"/> Unauthorized	
<input type="checkbox"/> Military, long-term			
<input type="checkbox"/> Worker's compensation			
December Vacation Leave Cash-Out (TEAMS only)		Personal Leave Days	
<input type="checkbox"/> Hours cashed out (Maximum of 16 hours; must have 40 hours or more remaining.)		<input type="checkbox"/> Used December – during the holiday closing period (Non-essential personnel)	
		<input type="checkbox"/> Used December 2 – June 30 (Essential personnel)	
		This event _____ Remaining balance _____	
*I am requesting leave without pay for the following reason(s): _____			
I certify that my absence is for the reason stated above and I understand that my absence will count toward my 12 workweeks of FMLA entitlement if absence is for a qualifying event. (See notice for more information.)			
Employee's signature _____		Supervisor's signature/title _____	

IMPORTANT NOTICE TO EMPLOYEES REGARDING FMLA LEAVE

FMLA (Family and Medical Leave Act)-QUALIFYING EVENTS INCLUDE:

1. Becoming a biological parent, a child being placed in your home pending adoption, or foster care.
2. To care for your immediate family member (your parent, child, or spouse) with a serious health condition as defined by the FMLA.
3. A serious health condition, as defined by the FMLA, is one that makes you unable to perform the essential functions of your job.

Except as explained below, eligible employees have a right under the FMLA for up to 12 workweeks of unpaid leave in a 12-month period for the reasons listed above. You may elect to substitute accrued paid leave for unpaid FMLA leave in accordance with the usual requirements and procedures for using accrued paid leave. You must be reinstated to the same or an equivalent job with the same pay, benefits, and terms and conditions of employment on your return from leave.

Medical certification is required for all absences due to injuries or illnesses defined as serious by the FMLA regardless of whether the patient under medical care (either the employee or a member of the employee's family) meets the FMLA's definition of family or the university's broader definition of "immediate family." Medical certification must be furnished within 15 calendar days after the request for the leave is made, unless it is not practicable to do so despite diligent, good faith efforts. If medical certification is not furnished within the timeframe as described above the commencement of the leave may be delayed. If medical certification is never provided the absence is not considered FMLA leave.

Contact the University Benefits Department for information on how your insurance benefits may be affected while on paid or unpaid leave of absence.

You may be required to provide appropriate certification that you are able to return to work prior to being restored to employment. If such certification is required but not received, your return to work may be delayed until the certification is provided.

If the need for FMLA leave is foreseeable, you must provide the University of Florida at least 30 days advance notice before the leave is to begin. If 30 days notice is not practicable (for example, a medical emergency or change in circumstances) notice must be given as soon as practicable. If you fail to provide the University of Florida proper notification as described above, the commencement of the leave may be delayed.

You are required to report periodically on your status and intent to return to work while on FMLA leave. These updates will be required weekly unless you and your supervisor have agreed otherwise.

OTHER LEAVE POLICY HIGHLIGHTS

This application for leave form should be used to document an employee's absence from work when the length of the absence is 15 days or less. Only one period of absence (occurrence) may be entered on the application for leave form; however, more than one type of leave may be used during an absence. If the employee returns to work and later must be absent again, a second application for leave must be submitted for the second absence from work. In all cases, the application for leave should match the employee's time-worked record.

For absences greater than 15 days, complete a Request for Extended Leave of Absence form, an Intermittent Use of Paid Leave Application, and a Certification of Health Care Provider form, as appropriate.

Sick Leave

The Application for Leave form should be completed immediately upon return to work.

Vacation Leave

The Application for Leave form should be completed and approved by your supervisor prior to the date taken.

Your leave balance can be found at the bottom of your most current pay stub or by viewing your Leave History at Main Menu > My Self Service > Payroll and Compensation

Learn more about UF vacation and sick leave by visiting <http://hr.ufl.edu/benefits/leave/>

Viewing Your Earnings Statement

Your Earnings Statement (Pay Stub) includes important payroll information that you should look over every pay check for accurate deductions.

Steps on viewing your Earnings Statement:

- 1) Log onto <http://my.ufl.edu> using your GatorLink username and password.
- 2) Click Main Menu > My Self Service > Payroll and Compensation > View Paycheck.

Other useful menu items under Payroll and Compensation include W-4 Tax Information, Compensation History, and View Leave History.

Notify April Johnson or Chris Pickles immediately if there appears to be any discrepancies or errors.

Who is My Program Assistant?

Your program assistant will help you complete travel, purchase orders, reimbursement requests, and shop in myUF Market. Please use the following guide to find your assistant.

Robb Stokes

- Exhibits and Public Programs (Powell Hall)
- Lepidoptera (McGuire Center)
- Ornithology
- Mammalogy
- Bioinformatics
- Ordway
- Paleobotany & Palynology
- Vertebrate Paleontology
- Herpetology

Robb Stokes

rstokes@flmnh.ufl.edu

Ph. (352) 273-2111

Dickinson 278

Shuronna Wilson

- Director's Office
- Molecular Systematics & Evolutionary Genetics
- Invertebrate Paleontology
- Malacology & Invertebrate Zoology
- Archaeology
- Ethnography
- Herbarium
- Ichthyology
- Genetic Resources Repository

Shuronna Wilson

swilson@flmnh.ufl.edu

Ph. (352) 273-1904

Dickinson 268

Office of Museum Technology

Welcome to the Florida Museum of Natural History! The following is a brief outline of the services provided by the Office of Museum Technology (OMT). For more information, please see our Service Level Agreement and our Policies documents:

https://int.flmnh.ufl.edu/docs/computing_policies/omt_help_desk_sla.asp

https://int.flmnh.ufl.edu/docs/computing_policies/omt_Help_desk_policies.asp

Username/Password

Access to Museum IT resources is predicated on having a valid, active Gatorlink account. Supervisors: To request access for new appointees, please submit our Computing Access Request Form. If your new hire or volunteer does not have a Museum appointment, please contact Chris Pickles.

<https://int.flmnh.ufl.edu/helpdesk/access-request.asp>

Intranet

The Intranet is the Museum's internal web site intended only for access by for Faculty, Staff, and Students. It contains links to documents, policies, forms, tutorials, the Help Desk and more. You will be asked to enter your Gatorlink credentials to access this site.

<https://int.flmnh.ufl.edu/>

Help Desk

OMT uses an online Help Desk system to track help requests. If you need any assistance, please fill out (or have your supervisor fill out) the Help Desk form on the FLMNH Intranet at: <http://int.flmnh.ufl.edu/helpdesk/>. This will notify all OMT staff members of your issue and the appropriate personnel will contact you shortly. Whenever possible, please use this system instead of emails, phone calls, or office visits - we receive hundreds of requests every month and processing our requests through our ticketing system help to ensure that all requests are prioritized and addressed as quickly and efficiently as possible.

Please note, requests for additional permissions or increased access for an individual must originate from their supervisor. <https://int.flmnh.ufl.edu/helpdesk/> Help Desk - 352.273.1824

Office of Museum Technology

Computer Purchase and Setup

Please contact OMT for all your computer hardware and software purchasing needs. We can help you select the correct hardware and software to work with the museum network. Additionally, we can assist in getting you discounted prices and increased vendor support through volume UF purchasing contracts. Museum-owned computers that meet Museum hardware standards will be configured for the network by OMT. OMT provides software installation services for Museum-owned computers. Please note that OMT may only install supported software that has been properly licensed. Please see our OMT Policies for additional information on networking.

Please note, personally-owned devices are not permitted on the Museum network, however, may be connected to the UF Wireless Service using your Gatorlink credentials.

Email

Museum @flmnh.ufl.edu email addresses are provided to all Museum Faculty and Staff through the centrally-managed UF Exchange system. Please see our Museum email policy for more information.

Data Storage and Backup

Please store your data on Museum-provided network shares (*P, S, T, and U drives*), as desktop hard drives do occasionally crash. Please see our Network Storage Policy for more information.

Consulting

OMT can often provide general guidelines to help you choose the right technology. Please contact us for all of your technology questions and needs. You may review this information online at:

https://int.flmnh.ufl.edu/docs/computing_policies/omt_welcome_overview.asp

Purchasing Guidelines

Purchases are governed by federal, state, university, and funding agency policies and procedures. To ensure fiscal compliance, timely ordering, delivery, and payment, your first step in the purchasing process is to contact your program assistant.

Your program assistant will help you verify vendor status, shop in myUF Market, find preferred vendor discounts, and set up purchase orders, or “PO’s.” PO’s encumber money for your purchase by placing a financial hold on the account of your choice and represent an agreement between the University of Florida and a vendor for the rendering and payment of goods and services.

Please note, PO’s and payments can only be issued to established vendors. Please contact your program assistant to verify a vendor’s status. To establish a new vendor, the following documents are required:

Establishing New Vendors

Vendor and purchasing documents are available on the FLMNH Intranet under “Forms,” or through your program assistant.

Your program director or department head must sign the vendor tax information (VTI) form for approval.

Domestic vendors

- Vendor application
- Vendor tax information form
- Electronic Payment Authorization (*optional*)

Foreign vendors

- Vendor application
- International vendor questionnaire
- W8-BEN (individual) or W8-BEN-E (*entity*)
- Bank wire form

When do I need a PO?

- Orders ≥ \$1,000 accompanied by terms and conditions agreements
- Non-contract orders ≥ \$5,000. Minimum two competitive quotes are required for approval.
- IT orders ≥ \$20,000 & Communications orders ≥ \$25,000. Information Resources Manager (IRM) approval required.
- Orders ≥ \$75,000 are subject to formal competitive bidding as required by state law.

How do I submit a PO request for goods or services?

- Contact your program assistant
- Check availability through preferred vendors
- Get current, itemized quotes; specify account and obtain fund administrator's signature
- Submit completed request at least 7 days before due date to allow for accounting review and approval

Contracts for labor & services

- Include service begin & end dates
- Send contract to UF Purchasing for review of legal language (*required*)
- Proof of General & Auto Liability, Worker's Comp, and Builder's Risk insurance

Individuals may not sign contracts. Your signature could subject you to personal liability for contract terms and payment!

Invoice payment

- Confirm satisfactory receipt of goods and services (*signed packing slip, email confirmation*)
- Identify account to charge (*if not on PO*)
- If you receive an invoice, send payment approval and invoice to your program assistant

Travel & Reimbursements

- Submit completed Travel Authorization Request (TAR) showing projected expenses, location, and purpose at least 10 business days prior to traveling
- TAR's must be signed by traveler and traveler's supervisor or fund administrator
- Include name of conference, meeting, or workshop; specific research purpose; how travel fulfills museum's mission
- Include **required** foreign travel documents:
 - TeamAssist Emergency Assistant Program registration
 - UF International Travel Checklist
 - FLMNH Permitting & Export Controls Authorization
 - Per the Fly America Act, federal grants require air travel on US flag carriers, code-share partners, or Open Skies Agreement participants, **regardless of cost, preference, or convenience**. If no such carriers are available, file an FAA exemption request.
Exemptions must be approved by UF prior to travel.
- No reimbursements provided for Class C meals (day trips away from headquarters)

Non-Employee Travel

For non-employee travel (students, visiting scientists, collaborators, volunteers, etc.), please provide:

- Full name, date of birth, FLMNH department affiliation
- Completed TAR and purpose of travel
- Note: Volunteers must be officially registered **prior** to TAR submission

Travel Authorization Worksheet Domestic/Foreign

Name Ima Traveler UF ID# 1234-5678 DOB 1st travel only

Position Title Programs Coordinator Dept Natural History Acct/Sub Acct State, Grant or UFF

Purpose of Travel Attend American Alliance of Museums conference to accept award and lead "Captivating Your Audience with Interactive Exhibits" workshop

Benefit to the State: Accept award for FLMNH exhibits program, market traveling exhibits program to potential clients, educational outreach

	Date	Time	Destinations (Cities, State, Country)	
Departure	<u>4/12/15</u>	<u>9am</u>	From <u>Gainesville, FL</u>	To: <u>Atlanta, GA</u>
Return	<u>4/16/15</u>	<u>6pm</u>	From <u>Atlanta, GA</u>	To: <u>Gainesville, FL</u>

P-card Charged ☒ Yes ☐ No Airfare, lodging, registration, rental car

Participant Support ☐ Yes ☒ No _____

*Registration: ☒ Yes ☐ No Amount: \$350

Mileage: ☐ Yes ☒ No # of miles: _____ x.44.5= _____

*Lodging Request: ☒ Yes ☐ No Amount \$600

Meal Request: ☒ Yes ☐ No Breakfast # days 3 Lunch # days 4 Dinner #days 3

Per Diem ☐ Yes ☒ No Amount _____
(flat \$80 in lieu of meals/lodging)

*Airfare (Itinerary required) ☒ Yes ☐ No Amount \$350

* Contract Rental ☒ Yes ☐ No Amount \$30

Travel Advance ☐ Yes ☒ No Amount _____

*Miscellaneous (parking, tolls, taxi, etc) ☒ Yes ☐ No Amount \$50

NOTE: * Receipts required Total estimated costs \$1450

Pursuant of Section 112.061(3) (a), Florida Statutes, I hereby certify that this travel is for official business of the State of Florida and will be performed for the purpose (s) stated.

Ima Traveler
Traveler's Signature

Ima Traveler's Supervisor
Department Head

Cash Advances

- Available to **current employees**
- Submit requests at least 10 days before departure to allow for review, approval, and disbursement
- Must be accompanied by signed release and settled within 10 days of travel end-date
- If advance remains outstanding for 30 days, UF Travel Accounting escalates debt to wage garnishment and permanently revoke cash advances privileges

Closing Your Travel

- Save all receipts!
- Provide detailed written description, price per unit, and total cost on foreign receipts
- When traveling to remote areas, keep a detailed expense log. Use a receipt book to track expenses when receipts are not available. Have vendor sign and date itemized receipt with written description.
- Indicate payment (cash, personal credit card, pcard) on each receipt to facilitate settlement or reimbursement
- Confirm departure and return dates and times
- Specify dates for each meal requested
- Notify program assistant that your travel is ready to close. Submit all receipts (pcard & reimbursable).
- All conference, workshop, and meeting travel must be accompanied by a final schedule or agenda.

For more information, please visit Finance and Accounting's **Travel Directives and Procedures** or contact your program assistant.

Non-travel Reimbursements

Please provide the following:

- Itemized receipt showing vendor name, item description, price per unit, receipt total, and list of attendees
- Justification for purchase, specific benefit to department, and description of how expense furthers institutional mission
- Copy of bank or credit card statement showing purchase transaction and your name (please obscure irrelevant information)

Moving Reimbursements

If your letter of offer includes a moving allowance, your program assistant will help you navigate the university's reimbursement process. Please contact your PA prior to incurring expenses.

You may move household goods via U-Haul, Penske, or other self-moving truck rental company. Faculty/staff member will pay upfront moving costs. Reimbursement will be processed after move is complete and receipts submitted to department.

What do I need to do?

- Rent truck & equipment necessary (ex: hand truck for heavy items) or contract directly with a mover of choice.
- Purchase boxes, tape, packing materials and obtain receipts.
- Obtain receipts for all fuel purchased for the moving truck.
- Obtain receipts for tolls if applicable.
- Decline all insurance offered unless you are willing to pay for it. The State of Florida cannot reimburse for insurance. (Check homeowners and auto policies for items in transit coverage)
- Submit all receipts pertaining to the move of household goods ONLY.

The University does not consider meal expenses as moving expenses.

Purchasing Cards (PCards)



The following link will take you to the PCard webpage:

<http://www.purchasing.ufl.edu/departments/pcard/default.asp>

What is a PCard?: The University of Florida PCard is a corporate credit card issued by Bank of America. There is no waiting for a purchase order number and vendors are paid quickly. PCards are designed for UF staff, faculty, graduate assistants, and OPS (technical and professional) employees and can make commodities purchases, or travel for official University business. PCards are only issued to individuals whose dean, director, or department chair authorizes the request.

How do I obtain a PCard?:

1. Contact your PCard Processor, Pamela Atwell, at 352-273-1905.
2. Complete the "Online PCard Cardholder Certification Training" PST975, PST076, PST077.
3. Complete a PCard Application and sign a Cardholder Agreement Form.
4. Turn the original forms in to Pamela in room 278 Dickinson Hall for review and submission to the UF PCard Team.

What Do I do After I Receive My PCard?:

Please sign your PCard and contact your PCard Processor, and let her know you have received your card. She will review spending allowables, and how to complete paperwork for submission.

Special Reminders:

- All PCard Purchases must have a clear business purpose and be permitted by the funding source.
- All transactions are subject to review by the UF PCard Team.

The PCard Holder is responsible for:

- Turning in receipts within 3 days of purchase.
- Providing all needed documentation for each purchase; a detailed receipt and complete cover sheet.
- (Ideally backup should be scanned and sent to atwellp@flmnh.org.)
- Purchasing only allowable items.
- Not splitting purchases if the amount exceeds \$2,000.
- Not allowing anyone else to use their card.
- Ensuring there are sufficient funds in the intended funding source.

References, Resources, and Tool Kits

Pcard allowable, conditional, and non-allowable charges:

<http://www.purchasing.ufl.edu/departments/pcard/procedures/allowable.asp#allowable>

State purchasing contracts:

<http://www.purchasing.ufl.edu/contracts/default.asp>

UF Purchasing:

<http://www.purchasing.ufl.edu/departments/default.asp>

Travel directives:

<http://www.fg.ufl.edu/directives-and-procedures/travel/>

myUFL Toolkits:

<http://hr.ufl.edu/learn-grow/just-in-time-training/myu-toolkits/>

MISC

Include RSH classes (research administration)

Welcome Aboard!



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