

UL LAFAYETTE

PROFESSORSHIP DISCRETIONARY PROCEDURES

DISCRETIONARY FUND NUMBER:

The discretionary funds for your professorship have been transferred from the UL Foundation to your account. Your Professorship is assigned a six-digit FUND number to be used on ALL Professorship correspondence. With Banner, the FUND number is also your ORGANIZATION number.

Example:	Fund #	<u>Organization #</u>	<u>Account #</u>	<u>Program #</u>
	701234	701234	Banner Account Code	10 (for Faculty)

TRACKING YOUR FUND BALANCE:

You will use the fund number to log into Banner to track your fund balance. Information regarding Banner Self-Service will offer instructions on how to access your fund on Banner is attached. The default type for all Professorship allocations will be "Travel." There is no need to adjust the default, as it is handled by the Comptroller's Office. If you have problems or questions, you may contact the Comptroller's Office (Arlene Hoag / 482-1775).

It is important to track of all expenses made from your Professorship account. Neither the Office of Faculty Affairs nor the UL Foundation will be able to provide information on discretionary fund balances. All professorship discretionary funds are to be spent annually.

Personnel Action Forms (PAFs) for students or graduate students will need to be manually deducted from the balance Banner is showing. The to-date expenses for these can be viewed by changing the ACCOUNT TYPE from 70 to 60.

ALLOWED USE OF DISCRETIONARY FUNDS:

The Board of Regents policy for the Endowed Professorship Program states:

Consistent with Constitutional restrictions on the BoRSF and BoR policies, a faculty holder's expenditures must be supplementary and enhancing in alignment with the defined purposes and goals of the professorship. Per Article VII, §10.1, no expenditures may "displace, replace, or supplant appropriations from the general fund...for higher education." Endowment earnings may not be used for general operational costs of the institution, college, or department, including repair and maintenance, construction and renovation, or standard office/laboratory equipment.

Professorship funds are not for general purchases that should be paid using general operation funds. To ensure the proper use of this funding as allowed by the University and the Board of Regents Policy, listed below are examples of specialized, enhanced materials and general purchases for which the funds can and cannot be used.

<u>ALLOWABLE EXPENSES</u> (include, but are not limited to):	
• Travel for research presentations, development or research	• Professional memberships that contribute to research and teaching
• Books and professional subscriptions	• Specialized or enhanced equipment
• Specialized or enhanced computers, etc.	• Research supplies (lab, etc.)
• Graduate student hiring	• Student worker hiring
• Graduate student travel	• Publishing expenses
• Teaching technologies	• Undergraduate research
• Graduate research	• Scholarship and research materials

<u>UNALLOWABLE EXPENSES:</u>	
<ul style="list-style-type: none"> • Costs typically borne by the institution, or unit for non-endowment holders 	<ul style="list-style-type: none"> • Operational costs of institution, college, or department
<ul style="list-style-type: none"> • Standard Office furniture 	<ul style="list-style-type: none"> • General office supplies
<ul style="list-style-type: none"> • Standard computers 	<ul style="list-style-type: none"> • Alcohol
<ul style="list-style-type: none"> • Appliances for office use (i.e., ice machines) 	<ul style="list-style-type: none"> • Catering
<ul style="list-style-type: none"> • Repair and maintenance of standard office/lab equipment 	<ul style="list-style-type: none"> • Construction and renovation of standard office/lab spaces
<ul style="list-style-type: none"> • Gifts, swag, or incentives 	<ul style="list-style-type: none"> • Paper (for department's general office use)
<ul style="list-style-type: none"> • Meals (non-travel related) 	<ul style="list-style-type: none"> • Donations

If you have any questions about allowable purchases with your discretionary funding, email Dr. Robert McKinney (rmckinney@louisiana.edu).

Important dates:

Discretionary funds are for the period of July 1 through June 30 of any given fiscal year, however, it is important to note that **deadlines are prior to the June 30 date and must be followed** to allow adequate time for processing expenses and reimbursements. Financial Services closes accounts at the end of the University's fiscal year (June 30). The Purchasing Office establishes deadlines for submitting requests for expenditures and reimbursements. **Purchase Requisitions and Travel Requests will not be accepted after the deadline dates.**

Administrative and Financial Services' final deadlines for the 2019-2020 fiscal year closing are announced via email in the "University's Announcement". While the exact date is uncertain at this time, you should begin watching for it at the beginning of March or you can call the Purchasing Office to see when the information might become available. If you have any questions, regarding due dates or end-of-the year processes, call the Purchasing Office (482-5396).

Travel Expenses forms are due within 30 days from the return date of your travel. However, at the end of the fiscal year, this 30-day time frame may vary. Check the University's end-of-the-year email notification.

GENERAL PURCHASES/INFORMATION:

It is important to note that purchases paid for with Professorship funds are NOT personal property. The items and equipment purchased **are University property**. All purchases MUST follow state procedures and be inventoried and tagged as determined by State and University guidelines. On all correspondence, Purchase Requisitions or LaCarte Card logs, be sure to include the fund number. It is not necessary to route requests through the Office of Faculty Affairs for approval and do not submit Foundation Warrant Forms for use of your Professorship funds.

All equipment equal to or over \$1000 MUST be purchased with a Purchase Requisition. Equipment valued at or over \$1000 per unit cannot be purchased with a LaCarte Card. Equipment equal to or over \$1000 (per unit) in value and computer-type items of ANY value (desktops, laptops, tablets, iPads) are considered taggable items and require a Purchase Requisition. Following this procedure ensures that the item will be tagged before it is delivered to you.

LaCARTE CARDS:

Professorship holders who will be traveling will need to have a LaCarte card. Information regarding the application and use of LaCarte Cards can be found at <https://purchasing.louisiana.edu/department-information/lacarte>. The State Travel Office requires that all travelers have a LaCarte for airfare, lodging, registration, taxis and vehicle rental, parking and baggage. Use of personal credit cards for travel must be pre-approved by the UL Travel Office. To ensure being reimbursed, it is important to check with the

Purchasing Office on the allowable use of a personal credit card before making any purchases on a personal credit card.

In the event, that it is necessary for another cardholder to purchase an item on their LaCarte Card for a Professorship holder, the Professorship holder will need to approve the transaction by signing the LaCarte Card Log of the cardholder next to the applicable transaction.

TRAVEL:

To use your discretionary allocation for travel and to allow time to receive the approved request for booking hotel stays and airfares, submit a completed Travel Request Form at least 6-8 weeks prior to domestic travel and 10-12 weeks for international travel. (Note: International travel will also require a letter of justification attached to the Travel Request.)

On both the Travel Request and Travel Expense forms, be sure to include the fund number. The following applies to the paper Travel Request Form and the paper reimbursement form and will change with the implementation of Chrome River.

On the Travel Request Form enter the Professorship BANNER FUND NUMBER on the funding chart located at the bottom of the Travel Request Forms (on new forms). The BANNER FUND NUMBER is your Professorship Account Number shown TWICE (separated by a hyphen) -10 (for faculty).

Example:	Fund #	Organization #	Account #	Program # (FOAP)
	701234	701234	72XXXX	10 (for Faculty)

- Indicate the amount being requested under "Funds Limited To."

Upon completion and signatures are obtained by the applicable individuals, forward your Travel Request to Purchasing. Upon approval, your Travel Request Form is returned to you and you may then book reservations. All State policies apply to travel. Reimbursement for alcohol and Louisiana State Sales Tax with University funds is prohibited.

Meals are reimbursed upon return by submitting a travel expense form. Travel Expense forms MUST be submitted within 30 days from the return date of your travel. After that time, a justification MUST be attached explaining the delay. Reimbursement by the University is not guaranteed. **For travel at the end of the fiscal year, this 30-day time frame may vary. Check the University's end-of-the-year notification.**

Once signed by the applicable individuals, Travel Expense forms are forwarded to Purchasing-(Norma Landry). It is not necessary to route Travel Requests or Travel Expense forms through the Office of Faculty Affairs for approval.

If your Travel Request has been approved by the University and your requested **trip has been CANCELED, send an email** to Kassie Clarke, Travel Office (kxs2315@louisiana.edu) indicating all pertinent information, in particular, the approved Travel Request number. Once the Travel Request is approved, the funds requested for travel are encumbered and will not be available for use UNLESS you have canceled the approved Travel Request. Information on travel policies and on obtaining a LaCarte/State Travel Card is available at <https://purchasing.louisiana.edu/travel>.

COMPUTER AND SOFTWARE PURCHASES:

Information regarding software and/or computers purchases can be found at:

<https://purchasing.louisiana.edu/department-information/computer-purchase>

<https://helpdesk.louisiana.edu/get-help/knowledgebase/software/software-university-owned-computers>

<https://helpdesk.louisiana.edu/get-help/knowledgebase/software/university-standard-software>

Software (up to \$5000) may be purchased with a LaCarte Card **after approval has been obtained by the Information Technology Department**. Requests should be submitted to deviceapprovals@louisiana.edu. Indicate the amount and provide a justification for the purchase. A copy of the approval email must be attached to the LaCarte Card statement and log. The Purchasing Office can provide you with additional University instructions and procedures regarding ordering.

STUDENT WORKER HIRES:

Professorship funding can be used to can hire student workers by following the procedures below. The Professorship holder will need to **contact the Student Financial Aid Office**, Brenda Mouton (482-6499 or stupay@louisiana.edu). The student financial aid office will need to determine if additional pay will interfere in any way with any aid or scholarships a student is receiving. **NOTE:** All student employees, whether Federal Work Study or paid with departmental or professorship funds, can work only one job. S/he would have to cancel one to work the other.

If the student is cleared by Student Financial Aid to receive additional funds, a Personnel Action Form (PAF) will need to be completed on the student worker. You can contact Human Resources with questions regarding properly completing the form (482-6242), and the form can be found on their louisiana.edu webpage (personnel.louisiana.edu).

The **PAF will need to include the:**

- Amount per hour that the student will be paid (student workers are paid hourly)
- Number of hours per week being requested for the student
- MAXIMUM dollar amount the student will be paid from the Professorship Account,
- Period of time for which they are being paid and
- Justification that indicates why a student worker is needed and what his/her duties will be.

Indicate this information in the "Comments/Justification" section of the form. Please note that the amount indicated on the form **will be encumbered** and not available for use unless the holder indicates to the Comptroller that the encumbered funding should be released. Student workers are allowed to work up to 20 hours per week during the semester and 40 hours per week during breaks.

NOTE: The Professorship holder **will be responsible** for not going over the amount indicated on the PAF form.

For student financial aid questions or information, you will need to speak with Brenda Mouton in the Student Financial Aid Office. Her number is 482-6499 or you can email her at stupay@louisiana.edu.

GRADUATE ASSISTANT HIRES:

Professorship funding can be used to hire graduate assistants by following the procedures below. A Personnel Action Form (PAF) along with an offer letter will need to be completed. For more detailed instructions, please follow this link: <https://gradschool.louisiana.edu/faculty/funding-your-students>

You may contact Human Resources with questions regarding properly completing the Personnel Action Form (482-6242). The Personnel Action Form link (shown below) can be found on their louisiana.edu webpage (personnel.louisiana.edu).

<https://humanresources.louisiana.edu/sites/humanresources/files/Personnel%20Action%20Form%20%28Revised%201.8.19%29.pdf>

The **PAF will need to include the:**

- Pay rate of the graduate student being hired,
- Period of time for which the student is being paid

- Students can be hired for both fall and spring on the same PAF.
- Summer semester and breaks must be submitted on separate PAFs
- MAXIMUM dollar amount the student will be paid from the Professorship Account,
- Justification that indicates why a graduate student is needed and what his/her duties will be.

Indicate the justification for hiring a graduate student in the "Comments/Justification" section of the form. Please note that the amount indicated on the form **will be encumbered** and not available for use unless the holder indicates to the Comptroller that the encumbered funding should be released.

Graduate students may be hired as "Instructor of Record" Graduate Teaching Assistants (GTAs) providing they have completed a minimum of 18 graduate credit hours. Graduate students are not allowed to work more than 20 hours per week.

Once signed by the Department Head and Dean of the College, the PAF form is forwarded to the Comptroller's Office (Arlene Hoag). The Comptroller will then forward the PAF to the Graduate School for final approval. The Graduate School will send the approved copy to the Professorship holder. Please remember that the student may not begin working until you receive the approved PAF.

NOTE: The Professorship holder **will be responsible** for not going over the amount indicated on the PAF form.

For questions regarding hiring a graduate assistant, contact the Graduate School Office (Tanya Derigo / 482-6963 or C00001165@louisiana.edu).

QUICK REFERENCE AND REMINDERS:

1. It is important that you keep copies of any paperwork submitted (including all forms and receipts).
2. All receipts MUST be itemized.
3. Please allow a generous amount of time for routing and processing all paperwork, especially travel and purchase requisitions. On average, the recommendation is 6-8 weeks.
4. Holders are accountable and in control of their funds. Departments are not allowed to spend Professorship funds dedicated to the holders.
5. Holders who overspend their Professorship account/s will need to provide another funding source or repay the University personally.
6. All State policies apply to discretionary funds and are handled through the University's Administration and Finance Offices.

LINKS:

Office of Purchasing: <http://purchasing.louisiana.edu/>

LaCarte Card: <https://purchasing.louisiana.edu/department-information/lacarte>

Travel: <https://purchasing.louisiana.edu/travel>

Computer Purchases: <https://purchasing.louisiana.edu/department-information/computer-purchase>

Software Purchases:

<https://helpdesk.louisiana.edu/get-help/knowledgebase/software/software-university-owned-computers>

and

<https://helpdesk.louisiana.edu/get-help/knowledgebase/software/university-standard-software>

Printer Purchases: <https://helpdesk.louisiana.edu/howtoorder-printer>

IMPORTANT CONTACTS:

<u>TRAVEL:</u> Kassie Clark kassie.clark@louisiana.edu 482-6250	<u>LaCARTE CARDS:</u> Josie Mariano josephine.mariano@louisiana.edu 482-6243	<u>BANNER:</u> Arlene Hoag arlene.hoag@louisiana.edu 482-1775	<u>PURCHASING:</u> Lark Chartier lark.chartier@louisiana.edu 482-6239
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The intention of the information shown in the Procedures and Guidelines is to provide an overview of the processes involved with using Professorship funding. For detailed information or questions, contact the office/s associated with the inquiry.