Welcome to the Finance and Administration Update Meeting for November & December

The meeting will begin at 10:30 AM
Zoom Only
Finance and Administration Update Meeting

- Time: last working Friday of every month at 10:30 AM
- Delivery method: view/listen only on Zoom
- Slides and other resources will be available after the meeting at:
  - Finance and Administration Updates Google Drive
  - Controller’s Office website: https://controller.appstate.edu/
- Contacts: Yifan Zhou (zhouya@appstate.edu), McKenzie Harris (Google Group and Google Drive) (harrismk@appstate.edu)
Meeting Agenda

- General Information, updates, and reminders
- Delegation of Signature Authority
- Gifts, Awards and Prizes
- Human Subject Payments
- Foreign National Guest Lecturer/Speaker Contracts
- Chrome River Q&A for Justin Hodges
General Information/ Updates/ Reminders

- Sharon Yates is now the Position Control/Personnel Budget Analyst. Questions about positions should go to Sharon.
- Kristie Beach is now the General Fund Budget Analyst
Delegation of Signature Authority

- **Presented by (Information provided by OGC):**
  - Yifan Zhou - Associate Controller, Controller’s Office

- **Contact:**
  - Jennifer D. Chrisohon - Associate General Counsel
    - Phone Number: 828.262.2751, E-mail: chrisohonjd@appstate.edu
Delegation of Signature Authority

- Pursuant to applicable provisions of the North Carolina General Statutes and Board of Governor's policies, the Chancellor at each institution has the authority to sign contracts, leases, and other legal documents. The Chancellor retains this authority at all times and may exercise this authority herself or through written delegations to other administrative officers.

- Appalachian State University does not recognize contracts as binding that are signed by University employees that do not possess duly delegated signature authority. Employees who sign contracts without the requisite authority may be personally liable for the contract and subject to disciplinary action.

- For a delegation of authority to be valid, delegations must be in writing and include the following: (a) the name, title or position of the individual to whom the delegation will apply and (b) a description of the scope, terms, and limitations of the delegation. The Office of General Counsel shall receive and retain a copy of all such delegations and maintain the official delegation chart for the University.

- If you have questions about who is authorized to sign a contract on behalf of the University, please contact the Office of General Counsel.
Delegation of Signature Authority Chart

- Delegation of Signature Authority Chart
  - Correction: University Advancement, Individual/Preferred Signature should be Jane Barghothi instead of Randy Edward

- Other than the individuals on this list, no one has been delegated authority to sign on behalf of the University for any contracts, agreements, MOUs, or other legally binding documents.

- Please note: We do currently permit Internship Coordinators (No updated list for those individuals yet) in each department to sign the internship agreements with host sites and students.
Controller’s Office Updates and Reminders

- **Presented by:**
  - Elaine Berry - Director, Special Funds Accounting
  - Yifan Zhou - Associate Controller, Controller’s Office

- **Contacts:**
  - [https://controller.appstate.edu/contacts](https://controller.appstate.edu/contacts)
New International Contact Template

Questions - Employee vs. Independent Contractor

Employee vs. Independent Contractor

Is this request for a/an?

- Independent Personal Service
- Independent Personal Service for third party entertainers
- Independent Personal Service for Athletics Officials (Athletics Use Only)
- Guest Speaker who is not interacting with a class
- Guest Speaker who will be interacting with a class for two days or less
- Guest Speaker who will be interacting with a class for more than two days
- Foreign National with work outside of the U.S.

* Required
Gifs, Awards and Prizes

- Taxation of Gifts Policy
- Gifts, Awards and Prizes Purchase Request
- Gifts, Awards and Prizes Recipient Log
- Thresholds for Reportable Gifts, Awards, and Prizes
- You may also find the above information on the Controller’s website:
  https://controller.appstate.edu/forms/tax-compliance
Human Subject Payments

- Human Subject Payments Request
- Human Subject Payments
- Participant Stipend Log
Special Funds Accounting

- Amazon Gift Cards
- Purchasing is looking for a short term solution to the pending requests
- Long term solutions including other options, which will take some time
- Updates will be provided as soon as we have them

- Summer 2020 Effort Reports are due ASAP
Chrome River Q&A

● Contacts:
  ○ Justin Hodges - Chrome River System Administrator
    ▪ Phone: 828-262-8006, Email: hodgesjh@appstate.edu
  ○ Cheryl Creed - Travel Related Questions (Reimbursements, Advances, Third Party Lodging & Mileage Logs)
  ○ Sandy Moretz - Travel Related Questions (Reimbursements, Advances, Third Party Lodging & Mileage Logs)

● Training:
  https://workshops.appstate.edu/course/info/bfin-introduction-to-chrome-river-expense-management

● Questions for Justin?
Questions?
Thank You for Attending
Merry Christmas and Happy New Year!
We hope to see you at the next meeting in January!