



Financial Matters

Finance Division Newsletter

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CHANGES TO COMPETITIVE BID REQUIREMENTS

Uniform Guidance Procurement Standards went into effect for Brown University as of July 1, 2018. The Office of Sponsored Projects wrote to the Office of Grants & Acquisition Policy and Accountability at the Department of Health & Human Services to request that the University be permitted to retain our Micropurchase threshold of \$25,000 based on our past audit records. On July 30th, our request was approved.

The University's policies governing the use of competitive bids and sole source purchases have been updated to reflect the HHS permission to remain at \$25,000. It is important to note that although the threshold for when competitive purchasing practices are required, that the changes under Uniform Guidance regarding the acceptable justifications for using a non-competitive process (sole source justifications), are still in force.

In addition to the change that allows us to continue to use \$25,000 as the Micropurchase threshold, the Small Purchase threshold has been increased from \$150,000 to \$250,000. For purchases that exceed \$250,000 that are charged to a federal grant, they must include a public bidding opportunity. In order to comply with this aspect of the Uniform Guidance requirements, departments will be required to work with Purchasing Services to manage the bidding process when federal funding is used for purchases that will exceed \$250,000. This includes purchases that will be transferred to a federal award at a later date.

An overview of the Uniform Guidance Procurement Standards, the revised University policy for the use of competitive bids and sole source purchases, and the updated sole source justification form can be viewed through these links:

<https://www.brown.edu/about/administration/purchasing/uniform-guidance-procurement-standards>

<https://www.brown.edu/about/administration/policies/competitive-bid-requirements-and-sole-source-purchases>

EXPENSE REIMBURSEMENTS

The Business Expense Reimbursement policy, which applies to all Brown faculty, staff, students, and visitors being reimbursed for travel in accordance with Brown's travel policy, requires expense report submission in Workday within 60 days of the expense or end of a business trip to avoid becoming taxable income. If the expense report is submitted later than 60 days, the payment is processed through payroll as a taxable payment to the employee. When the payment is processed through payroll, the expense will default to the employee's home cost center. If needed, the gross can be reallocated to other organizational worktags by submitting a journal entry. If the reallocation is to a sponsored project, the Cost Transfer journal source must be used. More information on this process is available in the [Business Expense Reimbursements](#) policy.

EMBARQUE: NEW CAR SERVICES SUPPLIER

Due to popular demand, Purchasing Services has established a formal relationship and is working on a University-wide master contract with Embarque, which is a car service provider that is currently used by a few departments at Brown. We are consolidating the existing departmental accounts into one master account for the University and leveraging our campus-wide volume for additional discounts. Embarque and Carey International are two facets of the same company, and our discounted contract rates will apply to both. (*Embarque will provide service for local and domestic travel, and Carey will service international travelers.*) Brown will be able to pay for these services by PO or PCard. See the [Preferred Suppliers](#) page on the Purchasing Services website for more information on using Embarque and our other preferred car services.

PCARD TRANSACTION REVIEW AND APPROVAL

It is important for PCard accountholders and approvers to review and approve transactions in the Bank of America WORKS system before the end of each calendar month. Part of this review includes ensuring the worktags used are correct. If they are not correct, you can change the worktags by following the instructions for *Allocating/Editing a Transaction* in both the *Accountholder* and *Approver* Job Aids, both of which are available on the [PCard website](#).

PCard transactions default to the General Supplies spend category. All spend categories in Workday are available in WORKS so you can easily change to a more appropriate spend category. If you cannot see the spend category used, you can change your view of transactions in WORKS by clicking on the “columns” drop down arrow on the right hand side of the transaction box and selecting the spend category column.

On the end of the first business day of each month, all PCard transactions for the preceding month will be batched and uploaded to Workday and you will no longer be able to allocate worktags in WORKS. You will receive several emails throughout the month as well as at the end of the month, reminding you to review your transactions.

PCard drop in sessions are offered monthly for both cardholders and approvers! If you need assistance navigating WORKS, the Accounts Payable team can provide you with hands-on training. The upcoming sessions are listed at the end of this newsletter and are also listed on the [PCard Website](#).

PAYMENTS TO FOREIGN NATIONAL VISITORS

As a reminder for departments with international visitors, it is important to visit the [Foreign National Information](#) website and review the information about permissible payments on the *Payments to Foreign Nationals at Brown* chart prior to committing to any payments to non-US individuals. Payment types allowed to these individuals may be limited based on the type of visa they have arrived on. Please review the policies and the chart as these may be helpful in determining allowable payments.

Upcoming training on Payments to Foreign Nationals is scheduled for September 11 and September 13. Please enroll in Workday Learning or click on the registration links listed at the end of this newsletter.

POLICY UPDATES

The Travel Meals policy has been updated and divided into three new policies: Travel Meals Policy, Travel Advance Policy, and Alcoholic Beverages Policy.

Travel Meals is an expense item in Workday used for meals consumed by Brown faculty, staff and students while traveling for the benefit of Brown University.

Travel Advances are permitted for faculty, staff, and graduate students of Brown to assist in defraying out of pocket cash while traveling for the benefit of Brown University.

The Alcoholic Beverages Policy states the University’s position on the usage of alcoholic beverages at Brown.

For more information on these policies and all other travel related policies, visit the [Administrative Policies website](#).

SUSTAINABLE PURCHASING

Purchasing services is committed to supporting the University's sustainability goals and the work of the [Sustainability Strategic Planning Advisory Committee \(SSPAC\)](#), which seeks to decrease the University's environmental impacts. We promote the practice of Green Purchasing whenever possible and encourage the campus community to embrace it, as we view this as a responsibility that we all share. Green Purchasing is the practice of procuring goods and services that cause less harm to the environment, and the living beings that depend on it for survival. Green Products are those manufactured with more environmentally-friendly materials or which are produced with minimal impact to the environment. [Environmental Awareness Policy Statement](#)

ANNOUNCING BROWN'S *Greener Delivery Program* - a greener way to get our supplies with less cardboard waste

In support of sustainability, we have implemented a Greener Delivery Program for orders placed with our preferred partner for office supplies (Office Depot). Many of your orders will now arrive in reusable tote bags rather than cardboard boxes. Office Depot will collect and reuse the bags for future deliveries.

What can you do to support Brown's sustainability goals?

Consider the University's sustainability goals and strive to engage in Green Purchasing, whenever possible.

Did you know that you can find a host of green products in the [Office Depot Punchout](#)? Simply select a category tab from above - scroll down to ***More Ways to Shop*** and click on ***Greener Office Products***.

Did you know that by selecting high yield "X" ink/toner cartridges instead of standard yield "A", you can support sustainability and save money? Although the price of a high yield cartridge is higher than standard yield, it is a smarter purchase, because it lasts much longer resulting in overall cost savings and efficiencies and is a more sustainable choice.

The purchase of products that include the criteria below are examples of what is considered Green Purchasing:

- Durable, as opposed to single use or disposable
- Non-toxic or minimally toxic, preferably biodegradable
- Highly energy-efficient
- Recyclable or safely disposable
- Made from raw materials obtained in an environmentally sound, sustainable manner
- Manufactured in an environmentally sound manner
- The cause of minimal or no environmental damage during normal use or maintenance
- Shipped with minimal packaging (consistent with care of the product), preferably made of recycled and/or recyclable materials

TRAINING AND CONTACT INFORMATION

If you have any questions, comments or suggestions for future issues of *Finance Matters*, please send them to finance-division@brown.edu.

Upcoming Training

September 5, 10am:	PCard drop in session, South Street Landing, Room 493
September 11, 9am:	Payments to Foreign Nationals, South Street Landing, Multi-Purpose Room Register in Workday Learning
September 13, 2:30pm:	Payments to Foreign Nationals, South Street Landing, Multi-Purpose Room Register in Workday Learning
October 9, 10am:	PCard drop in session, South Street Landing, Room 493
October 10, 9am:	Where's My Check? Resolving Accounts Payable Payment Issues, South Street Landing, Multi-Purpose Rooms 497 & 498 Register in Workday Learning
November 7, 10am:	PCard drop in session, South Street Landing, Room 493

Contact Us

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