

# Biology Department Guide

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## Biology Office Contacts (Hours 9am-5pm)

Amber Davis	Director of Admin & Finance	5-0449	<a href="mailto:amberd@bio.umass.edu">amberd@bio.umass.edu</a>
Bill Jerome	Operations Manager	5-3159	<a href="mailto:wfierome@bio.umass.edu">wfierome@bio.umass.edu</a>
Blake Russo	Financial Manager	5-0902	<a href="mailto:btrusso@umass.edu">btrusso@umass.edu</a>
Zander Crowley	Main Office Staff	7-2964	<a href="mailto:zcrowley@bio.umass.edu">zcrowley@bio.umass.edu</a>
Janet Gralinski	Human Resources Staff	5-2835	<a href="mailto:janetg@bio.umass.edu">janetg@bio.umass.edu</a>
Bill Butman	Human Resources Manager	5-2909	<a href="mailto:wbutman@umass.edu">wbutman@umass.edu</a>

(Complete Biology Directories are located [here](#))

## Purchasing

Purchasing at UMass is done via purchase orders through our purchasing system BuyWays, or using tax exempt University credit cards called Procards. For travel and related expenses please see the travel section of this guide.

**BuyWays** - <https://www.umass.edu/afsystems/> (Scroll down, the current link is on a menu on the right side of the page.)

**Access** - BuyWays shopper access can be processed by anyone in the main office. All that is needed is an email from the PI requesting access for the person, as well as the person's ID number. The request is then forwarded to the Administration and Finance Systems team at [afsecurity@admin.umass.edu](mailto:afsecurity@admin.umass.edu). Sean Cahillane is the main contact at A&F systems regarding these requests.

**Training** - Once access is granted, training can be set up with either Blake or Zander. Training typically takes about 15 minutes.

**Purchases or Services of \$10,000 or more** – If a purchase or service of \$10,000 or more does not fall under an existing contract, it must either go to public bid via Bonfire, or be justified with a source justification form. Please contact Blake with any questions.

- **Bonfire** - All University bidding occurs on Bonfire, which is handled by the Procurement team. They require a detailed description of the item or service requested, as well as three potential suppliers and their contact info.
- **Sole Sources** - Purchases or services of \$10,000 or more for which there is only one acceptable source must be justified with a Sole Source Justification form. (Please note that price is not an acceptable justification for a sole source.)

**New Vendors** – If a vendor or individual is not in BuyWays, a W-9 will need to be received from them, if they are US based. For all foreign based companies or individuals, required documents can be viewed [here](#). Questions related to vendors can be answered by emailing [vendors@admin.umass.edu](mailto:vendors@admin.umass.edu) or contacting Jayne Krause at [jayne@admin.umass.edu](mailto:jayne@admin.umass.edu)

**Subcontracts** - Subcontracts must be processed and approved by the Office of Pre-Award Services. Please refer to <https://www.umass.edu/research/proposals/develop-proposal/subcontracts> for more information regarding the initial process. Once a subcontract is completed, a purchase order can be made in BuyWays.

## Procard

Procards are tax exempt University credit cards that can be used for University related expenses. The full manual can be found here <https://www.umass.edu/procurement/procard-manual>

**Procard Applications** - Anyone in the main office can provide an application. Procards for PIs must be approved by the Department Chair, and PIs must approve Procards for their employees. Each Procard will have a chosen associated fund, which charges will apply to by default. See the reallocations section below, in regards to having a charge applied to a different fund.

**General Rules** (Please see the full [Procard manual](#) or inquire at the main office for additional info)

- If a desired item is available on an established Campus, University, State, or MHEC contract, it must be purchased from the contract vendor.
- Staples is ~~not~~ an acceptable vendor, as we have an exclusive contract with WB Mason.
- Limits: \$1000 per day and \$5000 per month. Temporary limit increases can be made by contacting Hilary Osgood at the Controller's Office [hosgood@umass.edu](mailto:hosgood@umass.edu)

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**Tax Exemption** - Since the University is tax exempt, purchases made on Procards must not include sales tax. Anyone in the main office can provide you with tax exempt forms, if they are requested by a vendor. The cards themselves also have a tax-exempt reference number on them, which is sufficient at most retail establishments. If a cardholder is charged tax, it is their responsibility to have the tax reimbursed back to the card.

**Credit Card Management System (CCMS)** - All Procard purchases require receipts to be uploaded onto CCMS (hyperlink above). Receipts should be uploaded within a week of the purchase. After a receipt is uploaded and the purchase submitted, the purchase is then reviewed by the Procard Manager (Janet) for approval.

- **Forms** - Additional forms may be required for certain purchases, which you will be prompted to fill out if necessary
  - **Business Form** - Typically used for food purchases, explaining how it's an allowable business-related expense
  - **Missing Receipt Form** - Used when a receipt for a purchase is missing and cannot be retrieved from the vendor.
  - **Procard Explanation and Justification Form** - Additional justification for a purchase may be required to be detailed on this form and then approved by the Department Chair.

**Reallocations** - Each Procard is associated with a specific fund and speed type. If a charge is made on a Procard, and you would like it to be charged to a different speed type, please input the information in the CCMS website when uploading the receipt for the purchase, in the section marked "Is Reallocation required". Contact Blake or Zander with any reallocation inquiries.

**Amazon** - Zander has an established tax-exempt Amazon account. Either Zander or Blake can initiate a purchase from this account. Labs may establish their own tax-exempt Amazon account if they wish, however they may not pay for Amazon Prime, as it is not an allowable expense.

## Finance

UMass uses fund-based accounting. There are many categories of funds, some sponsored, such as federal grants, and some non-sponsored such as departmental general operating funds. Each fund has a commonly used reference number known as a "speed type", which is used across the University in various systems. Reporting for funds is available on Summit, as detailed in the Summit section below. Inquiries can be directed to Blake or Amber.

### Grants

Sponsored awards such as grants are handled by the [Research Administration and Compliance](#) team, which consists of the Office of Pre-Award Services (OPAS) and the Office of Post-Award Management (OPAM). As their names imply, OPAS reviews, approves, and submits external sponsored project proposals, while OPAM sets up, manages, negotiates, and executes existing awards.

## Startups

New research faculty will typically be awarded startup funds, as detailed in their offer letter. These funds can be used for general work related and research purposes, and have an expiration date, as detailed in the faculty member's offer letter.

## Research Trust Funds (RTFs)

Research trust funds are established when a new faculty member starts, which can be used for general research purposes. Revenue from sponsored awards is received in the RTF, as are some University related awards or allotments.

## Summit

[Summit](#) is a web-based tool that delivers PeopleSoft financial data both quickly and easily through customized graphs and tables. As a Summit user you have access to financial data for all of your accounts at both summary and detail levels. The various Summit "Dashboards" are designed with particular users in mind.

**Access** - Summit access can be initiated by anyone in the main office via a Financial Data Access Request form, which is submitted to Administrative and Finance Systems at [afsecurity@admin.umass.edu](mailto:afsecurity@admin.umass.edu)

**Training** - Summit training is available through Workplace Learning & Development [workshops](#). You can sign up for workshops on the site. Please contact Joe Hession of A&F Systems with any questions about these training workshops. Blake is available to answer any general Summit questions as well.

## Travel

### Travel Card

Anyone in the department can have a travel card. Travel cards held by faculty

members can be used to pay for graduate students and undergraduate students travel expenses (anything related to the trip), but anyone else would either have to pay for it out of pocket, or have their own card. Travel cards are NOT automatically paid, and so receipts MUST be submitted to Zander for processing, otherwise the card will not be paid. Cards that are not paid off in 60 days start to accrue late fees. Cards that are not paid off in 120 days or more will be shut off. Anything on the travel card does not have to worry about tax exemption.

## Non-Travel Card Expenses

Travel related purchases that were not made on a travel card, can only be reimbursed after the trip is completed. Any reimbursements for things not related to travel cannot include tax. Reimbursements come in as non-taxable income to your paycheck directly. If you are requesting a reimbursement that is more than 120 days old, it will be taxed.

## Travel Rules & General Information

Zander is the main point of contact for questions related to travel. For further questions Jayne Krause is the temporary contact person in the Controller's office, until a permanent travel administrator is established.

**Documentation** - Receipts are needed for all purchases over 25 dollars. Per diem amounts per city can be figured out by asking Zander or Blake. Any missing receipts must have a missing receipt form filled out.

**Registration** - International travel must be registered prior to departure, on the [TerraDotta Travel Registry](#). Registration can be completed using a UMass net ID. Alternatively, you may submit your travel details, including dates, flight details, contact information, and emergency contacts to Zander for proxy registration.

## General Information

### Human Resources & Payroll

For HR or payroll assistance, please contact Bill Butman HR Manager at extension 5-2909, [wbutman@umass.edu](mailto:wbutman@umass.edu) or Janet Gralinski at extension 5-2835, [janetg@bio.umass.edu](mailto:janetg@bio.umass.edu)

## Information Technology

For general IT assistance, email [net@bio.umass.edu](mailto:net@bio.umass.edu)

**Departmental Account set up** - To set up a departmental computer account, please fill out a form [here](#). Contact [George Drake](#) with any questions.

**Network Access, NENS Forms** - For network access please contact [Amber Davis](#), or [Bill Butman](#).

**Websites** - To update content on the Biology Department website, send the information to [Carrie Howard](#). For further assistance with the Biology Department Website, please contact [Steven Brewer](#), Director of the Biology Computer Resource Center.

**Poster Printing** - For poster printing information, please visit the Biology Computer Resource Center site [here](#).

## Facilities & Maintenance (7am to 3pm M-F)

Maintenance of Morrill Science Center facilities is coordinated by Operations Manager [Bill Jerome](#). Bill is responsible for building related emergencies or problems reported by the Physical Plant, as well as directing departmental projects relating to repairs and renovations. Bill is also the Environmental Health and Safety Coordinator, working closely with the Environmental Health & Safety Office to ensure safe conditions.

**After Hours Facilities & Maintenance (3pm-5pm)** - For facility or maintenance issues from 3pm to 5pm please contact Amber Davis, or contact the [UMass Solution Center](#). The solution center can be reached at 413-545-6401 and is available 24 hours a day, 365 days a year.

**Emergencies** – For emergencies involving fire, fire potential, loss of life, bodily injury, life-threatening or criminal activity, chemicals or other environmental hazards, call 911 on a campus phone. If using a cell or off-campus phone, the direct dial number is 413-545-2121.

## Shipping, Receiving, & Mail

**Receiving** - Packages for Biology are typically received in the main office, Morrill 3 RM 221, in the mailroom. Pls are responsible for having their packages retrieved; however, on most

days packages will be delivered throughout Morrill by a student worker. The main office staff will make a concerted effort to inform PIs and their support staff of any perishable or live deliveries.

- **Chemicals** - Chemicals must be delivered to the Chemical Delivery Room, located at Lederle Graduate Research Tower, Room 179. The chemicals are documented and will then be delivered directly to the requested lab.
- **Departmental Delivery** - When available, the main office may have a student worker deliver packages from the main office to labs throughout Morrill.

**FedEx** - FedEx pickup is every day between 3pm and 5pm. It is preferred that each lab set up their own FedEx account using their Procard, so that the user will be prompted to fill out any additional forms required for shipment. Biology also has a departmental account, which can be used, with the expense later being reallocated to a chosen fund.

**UPS** - Zander has a UPS account that gets the UMass discount; email him the address and a label will be made. The entire label must be covered in tape on the box. For packages that must go out that day, they can be put in the drop box outside which is picked up daily at 5, or they can be put on the cabinet in the main office near Zanders desk for pick up.

**USPS** - USPS is delivered to the main office each morning by Mail Services and is then distributed to departmental mailboxes by a staff member or student worker. Outgoing mail must either have proper postage, or have the speedtype of a fund to charge preceded by the letter A. Example "A123456". There is a drop box for USPS in the Biology main office, across from the mailboxes, labeled "Off-Campus".

**On-Campus Mail** - There is a drop box for On-Campus mail in the Biology main office, across from the mailboxes. This can also be used for other campuses in the Five College Consortium, or the Mass Venture Center in Hadley. There is no charge for On-campus mail.

- **Hand Carry** - On-campus mail that needs to be hand delivered can go in the hand carry box in the main off, to be delivered by a student worker.

**Genewiz & Macrogen** - There are drop boxes for Genewiz and Macrogen in the main office copy room. They are picked up daily by FedEx, which may come as early as 3pm.

- Macrogen label & supply contact: [sequencing@macrogenusa.com](mailto:sequencing@macrogenusa.com)
- Genewiz label & supply contact: [Colleen.Carey@genewiz.com](mailto:Colleen.Carey@genewiz.com)



**Styrofoam & Dry Ice** - Dry ice packages must be labeled with a dry ice label, available in the main office. Styrofoam packages must go inside of a cardboard box.

## Office Supplies

Office supplies are expected to be purchased using a PI's own funds. There are supplies available in the main office as well, which any staff member there can access.

## Keys & Card Access

**Ordering Keys** - Keys must be ordered by the person who will be receiving them, through the [Physical Plant website](#). An email will notify the person who requested it when it is ready for pick up. Students MUST return keys in order to receive diplomas. Anyone in the main office can provide key numbers as well.

**Door Card Access** – Contact Amber Davis with any card access inquiries

## Phone Line Activation

To activate a phone line or make changes to an existing phone line, please contact [Amber Davis](#).

## Reservations for vans, rooms, and equipment

Reservations can be made on the Biology Computer Resource Center (BCRC) [website](#) by anyone with a Biology Department Marlin ID. Access to this site is managed by Steve Brewer.

**Van Reservations** - Drivers of the van must be employed by UMass (cannot just be a student). Prior to using a van, Idling training is required, you can find the training on the [Owl Website](#). The vans are not insured individually, the only insurance is based on the driver being employed. They are not insured to be taken out of Massachusetts. They can be parked in any spot in any lot on campus, unless it is specifically designated for something else (handicap, special plates etc.)

- **Van Pickup** - To pick up a reserved van, ask any staff in the main office. You will be given a small binder with the van key, a gas card, a log to record mileage, and various information.
- **Fueling** - The gas card provided in the van binder can be used at the on-campus fuel pumps located at the northwest corner of the bus garage

compound at [255 Holdsworth Way](#). Additional information about fueling can be found [here](#).

- **Billing** - Billing for the vans will occur in the form of an invoice on a semiannual basis. The billing will be based on current mileage rates, which for 2019 is 58 cents per mile.

**Room Reservations** - There are several meeting rooms that can be reserved on the BCRC [website](#) as well.

**Equipment Reservations** - Equipment available for reservation on the BCRC [website](#) include a still camera, a video camera, a laptop, and two projectors. They can be picked up at the main office from any staff member there.

## Copy Machines

Each course and each faculty member will be assigned a copy code, which will be necessary to access the main office copiers. Each course is limited to 100 copies per enrolled student. Copying not related to courses will be charged to the faculty member's RTF account. Please contact main office staff with any questions.

## Parking Passes

Single day parking passes for lots 46 and 62 are available in the main office, and cost \$6 per day. Day passes for other lots are not available at the main office, however passes for the parking garage can be obtained by contacting Parking Services (413) 577-PARK (7275)