Cleveland State University
College of Engineering
Business and Administrative Manual

September 2007

This manual has been composed using the following principles:

First, the College refers all users to the existing, official, published policies and procedures posted by the University on the CSU website. This information is listed on pages 1-4.

Second, included is a set of written policies and procedures that are related to the official CSU policies and procedures, but provide more specific information and/or guidance in the implementation of the CSU policies and procedures.

This manual will be updated on an as needed basis.

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CLEVELAND STATE UNIVERSITY POLICIES & PROCEDURES

Listed below are all the policies, by-laws, procedures, regulations, standards, guidelines, manuals, and handbooks posted on the Cleveland State web site as of September 2007. These can be found on-line here: http://www.ulib.csuohio.edu/policies/csu/index.htm

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ACCESS TO THE COLLEGE'S SHARED DRIVES

Access to College shared drives is arranged by the Associate Dean of Academic Affairs.

To get access, submit a request in writing via email to p.lin@csuohio.edu.

The Associate Dean will review the request with the Interim Dean to determine the legitimacy of the request. If approved, the Associate Dean will contact the necessary IS&T personnel to arrange for access.

The Associate Dean will maintain a listing of all users. This listing will be reviewed annually for accuracy as well as to determine if continued access is required.

If continued access is not necessary, the Associate Dean will contact the necessary IS&T personnel to arrange for removal of access.

ACCESS TO STUDENT INFORMATION

Any faculty, staff or student employee requiring PeopleSoft access, should follow the steps outlined here:

http://www.csuohio.edu/ist/peoplesoft.shtml

All faculty, staff or student employees requiring access to PeopleSoft Student Financials and/or student information in CampusNet must complete the CSU Security and Confidentiality Policy for Student Records form. The form can be found here:

http://www.csuohio.edu/ist/upload/FERPAagreementv3.pdf

A copy of this form should be submitted to the Dean's Office for retention.

Additionally, the College will include this form in part-time and full-time hiring packets for completion by new hires.

During the fall semester, the Dean's Office will obtain a current list of faculty, staff and student employees with access to PeopleSoft Student Financials and/or student information in CampusNet. If the CSU Security and Confidentiality Policy for Student Records form is not on-file in the Dean's Office, access will be evaluated.

If access is found to be unnecessary and/or the CSU Security and Confidentiality Policy for Student Records form is not returned, access will be removed.

AGREEMENTS AND CONTRACTS FOR EXTERNAL SERVICES (EXCLUDES PERSONNEL CONTRACTS)

All new and renewed Agreements and Contracts (excluding personnel contracts) must be reviewed and approved by the Office of Legal Affairs by the following procedure:

- Request an electronic copy of the contract from the external agency, vendor, etc.
- Complete the "Contract for External Services Routing Form." (See next Page).
- Attach a copy of the "Contract for External Services Routing Form" to the contract.
- Submit an electronic and a paper copy of the contract and the "Contract for External Services Routing Form" to the Office of Legal Affairs for processing.

Agreements and contracts should not be signed prior to the review and approval of the Office of Legal Affairs.

College of Engineering
Contract for External Services Routing Form

The attached contract between Cleveland State University's **College of Engineering** and ____ has been initiated for the purpose of ____, for the sum of ____________. The contract is in effect from _______ to _______.

The attached Agreement is a:

- ☐ Standard Contract (previously approved by CSU legal counsel)
- ☐ Non-Standard Agreement (previously approved by CSU legal counsel)
- ☐ Non-standard Agreement (that requires approval of CSU legal counsel)

Recommendation to Legal Counsel by Program Director/Coordinator:

I certify that the above information is accurate, and that I will oversee the related activities to insure compliance with the terms and conditions of the attached contract.

____

Faculty/Chair/Dean Statement Date

Legal Counsel

I hereby certify that I have reviewed the attached contract and find its legal form and content acceptable.

____

University Legal Counsel Date

Fenn College of Engineering Kaizen Staff Award

Kaizen is a concept of continuous improvement in which all levels of an organization's employees are encouraged to regularly make suggestions for improvement in any aspect of their workplace; in this instance, taking into consideration the overall performance of the College of Engineering or its departments. It involves looking at procedures as well as results in a non-judgmental fashion in order to eliminate waste and increase productivity. It is a positive problem solving method that enables employees to work smarter by making their jobs easier.

Based upon the definition above, criteria for receiving a Kaizen Award are:

1. Active full- or part-time professional or classified staff members with one (1) year of CSU service (and no longer on probation) are eligible to receive the award.

2. Employee makes a suggestion of a procedural or other change that will save time, energy, or have some other positive effect on the workplace, such as:
   a. Customer satisfaction (students and colleagues within CSU/Fenn)
   b. Improved market performance (enrollment and other measures)
   c. Operational performance (efficiency, budgetary, enrollment)
   d. Strategic planning (setting organizational direction)
   e. Knowledge and employee management (suggestions to use, manage, analyze, improve data, information, or personnel support; to improve equipment, quality, or environment)
   f. Other

3. The suggestion should be easily implementable with little or no financial investment.

Professional and classified staff members are urged to submit their suggestions confidentially in writing or email to one of the Deans. They will be reviewed for implementation on a regular basis by the Deans of the College of Engineering.

At the end of each Spring Semester, the Deans and one (1) elected (and un-nominated) staff member will review all the suggestions again and select one as the winning Kaizen Staff Award suggestion. The award, a cash gift in the amount of approximately $300 and a plaque, will be presented, and the suggestion will be announced at the annual Kaizen Staff Award Luncheon to be held each July.

Fenn College of Engineering Safety Award

The Fenn College Safety Award is a new award proposed by the College of Engineering beginning with the 2007-2008 academic year. It will recognize the <u>one</u> (1) most outstanding safety-related preventative action or suggestion.

Criteria for receiving a Safety Award are:

1. Faculty, professional, or classified staff members are eligible for this award. Eligible persons must be active full- or part-time employees with at least one (1) year of CSU service (and no longer on probation).

2. Faculty or Staff member suggests a procedural or other change that will positively impact the safety efforts of the College and prevent personal injury, in locations including, but not limited to:
   a. Labs (electrical, chemical, fire, environment, structural)
   b. Classsrooms
   c. Hallways
   d. Restrooms
   e. Elevators
   f. Parking garage;

   and in safety areas including, but not limited to:
   a. Environmental
   b. Electrical
   c. Chemical
   d. Unauthorized visitors
   e. HVAC
   f. Threats against person
   g. Structural problems/construction safety

Faculty and/or Staff members are urged to submit their written suggestions confidentially at any time to the Safety Award Committee c/o the Dean's Office. They will be reviewed for implementation on a regular basis by the Safety Officers of the College of Engineering.

At the end of each February, the Safety Officers will review all the suggestions again and select one as the winning Safety Award suggestion. The award, a cash gift in the amount of approximately $300 and a plaque, will be presented and the suggestion will be announced at the annual Steel Ring and Awards Ceremony to be held each April. If in a given year there were no viable suggestions, then no award will be presented in that year.

Fenn College of Engineering Support Staff Distinguished Service Award

The Fenn College of Engineering Support Staff Distinguished Service Award is a new award for our College beginning with the 2006-2007 academic year. The award will be a check in the amount of approximately $300.

The purpose of the award is to recognize the classified or professional support staff person within the College of Engineering who has most positively impacted the College. Any faculty or staff person can nominate one individual, and <u>one</u> award will be presented each year at the April Steel Ring and Awards Ceremony. Self-nominations are also permitted. Nominations must be accompanied by a brief statement detailing the reasons for nomination.

Criteria that must be met by an employee to receive the award are:

- Employment in a full- or part-time classified or professional staff support position in the College of Engineering
- Employee must be in active status with at least three (3) years of CSU service
- Must make outstanding contributions to the College. (Please note that person nominating must include clear examples of these contributions; general statements [such as "nominee has demonstrated outstanding assistance to students and faculty for years"] are unacceptable.)
- Employee must demonstrate exceptional team participation

A committee of three support staff members has determined the award criteria and has met to review the 2006-2007 nominations and determined the winner based upon the degree of impact upon the College.

The 2006-2007 Award committee consisted of James Barker, Pamela Charity, and Carolyn Kasprzak, and this year's award winner is Agnes Langford from the Mechanical Engineering Department. The award winner shall be the chairperson of the following year's selection committee. The other two members of the selection committee will be elected by a majority vote of the eligible (those not nominated for the award) staff members.

BUDGET DEVELOPMENT CALENDAR – CSU

The following represents a general budget development calendar. Specific dates and deadlines are subject to change based on factors both known and unknown by CSU administration.

February	Chief Enrollment Officer begins the process for developing Budget enrollment projections with the Colleges, the Provost's Office and University Budget Office by convening the enrollment work group.
February	A list of eligible, merit-based employees is forwarded to the Provost's Fiscal Operations Office by the Budget Office to start process for administrative faculty merit increases.
February	Deadline for the submission of permanent budget transfers to the university Budget Office.
February	The preliminary Budget assumptions and various scenarios are reviewed with the Planning & Budget Advisory Committee (PBAC).
February	General ledger budget files are locked. No permanent budget transfers will be processed after this date. Any permanent budget transfers requested after this date will be processed after July 1.
March	Budget enrollment projections submitted to Provost's Office Director, Fiscal Operations by the Chief Enrollment Officer.
March	President's Budget Message issued.
March	Final budget enrollment projection due to University Budget Office from the Provost's Office Director, Fiscal Operations. The Budget Office employs these projections to develop an estimate of Instructional Fee revenue.
March	Budget enrollment projections and revised budget scenarios are presented to the Planning & Budget Advisory Committee (PBAC).
March	Salary merit decisions finalized by the President & Provost/Deans.
April	Budget Office distributes budget spreadsheets and Budget Development Guidelines, and targets to the fiscal officers of all Academic Units (Colleges), Academic Support Units, and Non-academic Support Units. The spreadsheets will include salary allocations (if known and applicable), and miscellaneous changes that have been requested. Fiscal Officers begin the Input of information to the budget building spreadsheets.
April	Special Faculty Merit due to the Budget Office from the Provost's Fiscal Operations Office.

April	Fiscal Officer budget-building spreadsheet inputting concludes.
April	PBAC Monthly Meeting. Presentation of further revised Budget scenarios.
May	Tuition Resolution Presented to Board of Trustees for Approval.
May	Draft employee renewal letters provided to CFOs for review.
May	Corrections to employee renewal letters.
June	Budget presented to Board of Trustees for approval.
June	Employee renewal letters mailed, if applicable.
June	Budget Loaded to the General Ledger in PS Financial System
June	Budget Loaded to the Budget tables in PS Human Resources System.

BUDGET DEVELOPMENT CALENDAR – FENN COLLEGE OF ENGINEERING

The following represents a general budget development calendar for the College of Engineering. As with the CSU budget development calendar, specific dates and deadlines are subject to change.

August	Chairpersons review current year work plans and anticipate faculty need for following academic year. The Dean reviews and forwards the request to the Provost's Office.
September	Faculty hiring requests are approved/denied by the Provost's Office. Chairpersons submit necessary paperwork to the Dean's Office.
October	Chairpersons review miscellaneous fees and submit changes.
December	Chairpersons and Directors work on academic schedules for the following fiscal year.
February	Academic schedules are complete. The Dean and Associate Dean for Academic Programs use these schedules to develop the College's enrollment projections.
March	Graduate Assistant requests are submitted to the Dean's Office.
March	Chairpersons request waivers as necessary for following year.
April	The College Fiscal Officer inputs information in the budget building spreadsheets.
July	Dean's Office makes Graduate Assistant allocations to departments.

CSU CENTER GUIDELINES

October 10, 2007

Definition of a Center

A Cleveland State University Center is an organizational unit within the University that is formed to: (1) promote research, (2) take advantage of funding initiatives and opportunities, (3) target audiences external to the University, (4) foster interdisciplinary studies, projects or initiatives, or (5) engage in public service or community outreach. Centers often are created based on external funding opportunities or interests of faculty, senior research staff, or professional staff. Centers should encourage participation by graduate and undergraduate students and offer opportunities for internships.

Types of Centers

Although there may be a great diversity among Centers, they can be grouped into the following four types. The larger Centers require greater institutional investment; therefore, are subject to the most thorough review for establishment and continuation. Center types 1 and 2 generally are too small to require detailed attention but do require some coordination and review, especially at the level of the college.

Type 1 Centers in a single academic college or administrative unit that require no internal resources.

This provides identity to a single investigator or group of investigators within a single college or administrative unit. This may be for the purposes of fund raising (grants, foundation or private donations), program recognition by constituencies served, or attraction of other faculty collaborators. No internal CSU resources are committed to a Type 1 Center beyond the current salary for faculty and no particular administrative or formal governance structures are required beyond the naming of a Director and review and approval by the appropriate Chairs and Deans. Approval to use a particular name is required to avoid duplication of names that would lead to confusion internally or externally. Approval by the Chair/Director and the academic college Dean is required. If the Center's activities range across two or more departments/schools, approval by all pertinent Chairs/Directors and the academic college Dean is required.

Type 2 Centers in a single academic college or administrative unit that require a minimal level of resources.

This provides identity to a single investigator or group of investigators within a single college or administrative unit but requires minimal resources. This may be for the purposes of fund raising, program recognition by constituencies served, or attraction of other faculty collaborators. Minimal internal CSU resources committed to a Type 2 Center may include, for example, a course release for a Director, office supplies, and office space. Policies for naming the Director and governance structures are required. Approval to use a particular name is required to avoid duplication of names that would lead to confusion internally or externally. Approval by the Chair/Director and the academic college Dean is required. If the Center's activities range across two or more departments/schools, approval by all pertinent Chairs/Directors and the academic college Dean is required.

Type 3 Centers across one or more academic colleges or administrative units requiring minimal resources.

This provides coordination of the efforts of a group of faculty representing a particular field and crossing boundaries of colleges or administrative units. It could provide for communication among the group (e-mail lists, web page, newsletters, seminar series, retreats), serve as a voice for the group (e.g., requests for shared equipment or resources, input into recruitment of faculty in the represented area, etc.), as a vehicle for enhancing recognition of the field (both internally and externally), as an entry point for companies with interests in the field, and as a fund raising vehicle. Institutional resources committed to the Center would be small (for example, a course release for a Director, or funding typically less than $50,000/year, which might be for things such as seminars and administrative support). Administration might consist of a Director and a faculty advisory group. The governance structure and process for naming a Director must be approved by the appropriate Chairs/Directors, Deans and the Provost.

Type 4 Centers requiring institutional support.
This provides the infrastructure support functions needed by a group of faculty with shared education, research or service/clinical interests. A Type 4 Center would have space assigned to it, and a formalized administrative mechanism (including a Director with administrative responsibility appointed or confirmed by the Provost). Institutional resources committed to the Center would be small to moderate (typically ranging from $50,000 and up), and might be used to provide for clerical support and shared equipment needs of the group of investigators in addition to those functions supported in Type 1, 2, 3 programs. The governance structure and process for naming a Director must be approved by the appropriate Chairs/Directors, Deans and the Provost. If the purpose of the Center focuses on research and external contacts, the process of approval should include the Vice President for Research.

<u>Proposal 1 (for Types 1-2-3)</u>

A document prepared to describe the purpose and goals of a Center; it includes information on faculty biographies, funding sources and requests for resources as appropriate, selection processes for internships, and involvement by undergraduate and graduate students. Proposals are approved by the appropriate Chairs/Directors and Deans, as necessary.

<u>Proposal 2 (for Type 4)</u>

A document prepared to describe the mission of a Type 4; it includes detailed information on organization, administration and governance structures, budgets, plans for measured results, selection processes for internships, and involvement by undergraduate and graduate students. Full proposals are approved by the Provost following recommendations by the academic college Deans, and the Vice President for Research.

<u>Review Processes</u>

All Centers shall be reviewed every 3 years. At the end of each review period, a Center shall be closed unless a continuation is approved. The Center Director shall submit a report -- detailing the Center's activities, achievements, challenges, and financial arrangements over the three-year review period and future plans--to his/her immediate supervisor (department Chair/school Director, or Dean(s)). If a decision is made to not continue a Center, the Center Director may appeal the decision (to the Dean if the decision to close the Center is made by a department Chair/school Director; to the Provost if the decision to close the Center is made by a Dean); when Centers are joint ventures of two or more colleges, the Deans shall collaborate in arriving at a decision.

<u>RESPONSIBILITIES</u>

Provost

The Provost approves creation and plans of Type 3 + 4 Centers; appoints or confirms Directors of Type 4 Centers; and approves continuance of Type 3 + 4 Centers.

Vice President for Research

The Vice President for Research reviews Type 4 Center proposals as needed and advises the Provost on continuance of Type 3 and 4 Centers as appropriate.

Deans

Deans review and approve plans of Type 1-4 Centers; approve the creation of Type 1-3 Centers; recommend approval of continuance of Type 4 Centers. For Centers that report directly to the Dean, the Dean oversees the activity of Centers and approves operating guidelines, allocates resources to the Center, initiates Center reviews, decides to continue or suspend activity of Center.

Department Chairs/ School Directors

Depart Chairs/School Directors review and approve plans of Type 1 and 2 Centers; approve the creation of Centers; recommend approval for continuance of Type 1-3 Centers; appoint Directors of Type 1 and 2 Centers. For Centers that report to the department Chair/school Director, department Chairs/school Directors oversee the activity of Centers and approve operating guidelines, allocate resources to the Center, initiate Center reviews, decide to continue or suspend activity of Center.

Faculty

Faculty prepare documents for creating Centers and submit pre-proposals to Chairs.

Center Directors

Center Directors follow operating guidelines for Centers, identify an advisory group, and have fiduciary responsibility for Center budget.

Adapted from University of Minnesota Center Policy.

<u>COMPUTER SECURITY POLICY AND CRITICAL DATA</u>

Engineering Instructional Computer Lab Policies

Fenn College of Engineering department pledges to provide an atmosphere conducive to instructional, study, reading, and the legitimate use of materials, equipment, and services. To foster this environment, it is necessary that all users act in a manner that is considerate of others. Any behavior or condition that disrupts the orderly use of the Instructional Computer Labs, that could constitute harassment, or that affects the staff's ability to provide service, is prohibited and will be handled by the appropriate enforcement authority.

The College of Engineering Instructional Computing Labs is for the expressed purpose of Engineering CSU students. They are restricted to student use. The University reserves the right to ask Lab users to provide a student I.D. or other identification. Refusal to provide this identification may result in a referral to the Campus police.

- The computer labs in SH125, SH128, and SH133 are for engineering students use only.
- Internet access is prohibited.
- No food and open containers of drinks is allowed at the computer desks.
- No student other than monitors has the right to make system configuration changes to printers and the software on the computers in labs.
- Students should save all their data on their own media rather than the computer hard drives.
- The Lab is not responsible for lost or stolen personal articles. Belongings should not be left unattended.
- Disruptive behaviors, such as loitering, blocking access, making disruptive noises, using abusive language, and threatening or harassing others are <u>prohibited</u>.
- Failure to comply with these policies will result in computer privileges being taken away.
- Any questions or concerns please talk with the lab monitors.

Critical data

Critical data is defined as any information that is vital to the continued mission and operation of the College of Engineering.

This would include information as follows (for the College of Engineering Dean's Office)

<u>General Administration Data</u>

1. ABET reports and responses
2. List of college Standing Committees
3. List of College Visiting Committee
4. List of Fenn Academy members
5. List of Co-op program sponsors (companies)
6. College meeting minutes

Student Data

1. Probation Letters
2. Dismissal Letters

Faculty Data

1. Faculty summer contracts
2. Annual workload assignments
3. Gifts and in-kind gifts tracking files
4. Technology transfer tracking files
5. Patent tracking files

Staff Data

1. New appointments or promotions of staff
2. Updated job description

This would include information as follows (for each department):

General Administration Data

1. Departmental ABET reports and responses

Student Data

1. Declaration or Change of Major forms
2. Credit-transfer forms (the blue forms)
3. Graduate admission letters
4. Students in the 5 yr. accreditation MS Program

Faculty Data

1. New appointments or promotions of faculty
2. Annual workload assignments

Staff Data

1. New appointments or promotions of staff
2. Updated job description

In order for the University's Business Continuity Plan to be fully effective, all faculty and staff will store all critical College related data on secure servers (The share folder is identified as \\VIKE\Engineering\ with subfolders for each department) that are behind the CSU firewall and get backed up on a regular basis.

Chairpersons and Directors will be responsible for ensuring all faculty and staff adhere to this policy. Faculty and staff failing to meet this policy risk losing access to University resources.

CONTRACT PROCEDURES

All contract procedures can be found on the CSU Human Resources Development and Labor Relation's Website at:

http://www.csuohio.edu/HRD/forms.html

This website provides guidelines (in Word and pdf formats) for the following contract situations:

- Employment Contract (Professional Non-Bargaining)
  - Interim Assignment/Temporary Transfer (Non-Bargaining)

- Letters of Appointment (SEIU)
  - FT Salaried Professional (SEIU)
  - PT Salaried Professional (SEIU)
  - PT Hourly Professional (SEIU)
  - Temporary Transfer (SEIU)

- Full-Time Faculty
  - Overload Appointment
  - Summer Contract

- Part-Time Single Term Special Status Faculty
  - PT Single Term Instructional Contract
  - PT Single Term Non-Instructional Contract

COURSE EVALUATION INSTRUCTIONS

Procedure for the Administration of the STUDENT EVALUATION OF INSTRUCTION in the College of Engineering

1. The evaluation form should be administered in the 12th week of classes with the faculty member out of the room. (In summer, the form should be administered two weeks before the end of the 6, 8, 10, or 12 week term.) In the case of interactive video distance learning (IVDL) classes, the faculty member will leave the originating site room while the evaluation is administered. Procedures for evaluation of online courses should be clarified with Betzi Bateman (RT 944, ext. 9207).

2. A colleague or graduate student will administer the evaluation form. If this is not possible, the faculty member should ask a student volunteer to administer the form. If the class has off-site locations via distance learning media, then a colleague or student should administer the form at each site.

3. The person administering the form should read the following to the students before the form is distributed:

   I AM GOING TO DISTRIBUTE THE FORM USED TO EVALUATE THE INSTRUCTION AND THE INSTRUCTOR IN COURSES OFFERED BY THE COLLEGE OF ENGINEERING. THE EVALUATIONS ARE IMPORTANT FOR PROVIDING FEEDBACK TO THE INSTRUCTOR AND FOR HELPING THE COLLEGE MAINTAIN THE HIGHEST QUALITY OF INSTRUCTION IN ITS COURSES. PLEASE CONSIDER EACH QUESTION CAREFULLY AND ANSWER IT HONESTLY ACCORDING TO THE DIRECTIONS ON THE FORM. WHEN YOU HAVE FINISHED THE FORM, PUT IT DIRECTLY INTO THIS ENVELOPE. I WILL SEAL THE ENVELOPE AND DELIVER IT TO THE DEPARTMENT OFFICE. YOUR INSTRUCTOR WILL NOT SEE THE RESULTS OF THE EVALUATION UNTIL AFTER FINAL GRADES FOR THE COURSE HAVE BEEN SUBMITTED. YOUR ANONYMITY WILL THEREFORE BE PROTECTED.

4. Completed evaluation forms are to be placed in a sealed envelope along with a SCANNER REQUEST FORM which has been filled in by the instructor. The person who administered the form should then sign his or her name across the sealed flap of the envelope.

5. The person who administers the evaluation or another volunteer should take the sealed envelope to the departmental office of the instructor's home department. Forms collected at off-campus distance learning sites may be mailed to the departmental office in an appropriate envelope. They may also be placed in the box outside SH104 if after office hours.

Evaluation results will be provided for instructors after final grades have been submitted.

PROCEDURES FOR INVITING AN EXCHANGE VISITOR TO CLEVELAND STATE UNIVERSITY

Cleveland State University (CSU) Fenn College of Engineering faculty and staff have the opportunity to collaborate with colleagues from other countries. A CSU faculty or staff member is required to serve as a sponsor of an invited exchange visitor. The Center for International Services and Programs (CISP) provides comprehensive information to assist departments in encouraging exchange visitor collaborations. The Center for International Services and Programs (CISP) will assist the sponsor and the exchange visitor in U.S. federal immigration regulations and university policies in conjunction with the invitation of an exchange visitor.

Generally, the exchange visitor enters the U.S.A. on a J-1 (exchange visitor) visa as a visiting scholar or visiting faculty. The sponsoring faculty member at CSU completes a special form called a DS 2019 Request Form (Exchange Visitor Request form). If the exchange visitor is coming to CSU on his/her own funds, he/she will need to provide the CSU Faculty member with documentation showing his/her source of funding which shows how much money is available for the duration of the stay. This information is required by federal regulations. The form is then approved by the Department Chairperson and the Dean of Engineering. Once all of the approvals have been obtained, CSU's Center for International Services and Programs (CISP) will prepare the necessary visa documents for mailing to the exchange visitor.

Step-by step instructions associated with the completion of this paperwork along with the Exchange Visitor Request form can be found at following link:

http://www.csuohio.edu/internat/prgm-exchange-form.html

If you have any questions, contact Monica Plunkett, at (216) 687-3910 or by email at m.plunkett@csuohio.edu.

FACULTY RECRUITING GUIDELINES

1. Travel, lodging, and preparations of small order forms (SOF) are the responsibility of the host department.

2. Dean's Office will cover expenses. All requests for expenses must be submitted to the Dean for review and approval. Requests should be made as far in advance as possible.

3. Campus visits should be scheduled before the New Year break or immediately after return to campus for spring semester. Pre-approval must be received from the Dean before inviting any candidate to campus. Ideally, two candidates may be invited to campus for interviews. The maximum that may be invited to campus is three.

4. **LODGING**: Suggested lodging arrangements are listed below. The SOF for lodging must state **NO ALCOHOLIC BEVERAGES, NO LONG DISTANCE PHONE CALLS, and NO FOOD**. It should also state **TAX-EXEMPT**. Submit the completed SOF to the Dean's Office. Once the Dean has signed, it will be returned to the department for processing. The hotel should forward the bill to the host department once the candidate has checked out. Initial the original invoice acknowledging that the invoice is correct and payment should be made. Send the original invoice with one copy and the SOF to the Dean's Office for final processing.

5. **AIRLINE TICKETS**: CSU must make travel arrangements for the candidate. Airline tickets can be prepaid through AAA Travel (216-606-6500 or 800-999-0038) using a SOF. The host department must call the travel agency, reserve a ticket for the candidate and give them the candidate's address as to where the ticket should be mailed. Send the completed SOF form to the Dean's Office. Once the Dean has signed, it will be returned to the department for processing. The travel agency should send the invoice to the host department. The original and one copy of the invoice, along with the SOF, should be forwarded to the Dean's Office for final processing. Initial the original invoice acknowledging the invoice is correct and payment should be made. While cost should be considered when purchasing airline tickets, candidates should not be inconvenienced by unnecessary layovers or too early/late departures/arrivals.

6. **OUT OF POCKET EXPENSES PAID BY THE CANDIDATE**: Reimbursement can be made to the candidate for any incidental expenses incurred during the interview process (e.g., cab fare, food, mileage, etc.). Except for mileage reimbursement, original receipts are required. In addition the candidate's name and address, **social security number and date of birth** are needed. Please complete a SOF and forward the original and one copy of the receipts to the Dean's Office for payment. Receipts must be itemized.

7. **OFF-CAMPUS MEAL MEETINGS**: Meal meetings are to be limited to the candidate and one or two others to be reimbursed on a SOF. The cost of additional attendees is the responsibility of the host department. Proper documentation must accompany each SOF to obtain reimbursement. Proper documentation must contain an **itemized** receipt stating

“no alcohol” along with a written record of the time, place, business purpose and attendees at the meal. Credit card receipts are not acceptable as itemized receipts; reimbursement **will not** be processed with only a credit card receipt. The completed form with original receipts and one copy should be sent to the Dean’s Office for payment.

8. **ON-CAMPUS MEAL MEETINGS:** On-Campus meal meetings are discouraged and should be held only in the event of extraordinary circumstances and with prior approval from the Dean’s Office. If approved, on-campus meal meetings are limited to the candidate and one or two others. The cost of additional attendees is the responsibility of the host department.

9. It is expected that all candidates will make a presentation to Faculty and the Engineering Administration and the search committee. Candidates for the rank of Assistant Professor need to be interviewed by the Dean (towards the end preferably), one of the Associate Deans, search committee, department chairperson, and appropriate representative faculty and staff. Candidate vitae and an approved candidate rating should be provided to all interviewing the candidate.

10. All correspondence regarding any offer to a candidate must be approved by the Dean of the College and the Provost. Please forward all correspondence to the Dean’s office for the Dean’s approval. The Dean will forward to the Provost’s office for approval. You will be advised regarding the correspondence.

FACULTY RECRUITING GUIDELINES – SUGGESTED LODGING

Ask for the Sales Department/Sales Manager when making reservations. Rates may vary depending on date, but should fall within the rates listed.

Hampton Inn
1460 East 9th Street
Cleveland, Ohio 44114
216-241-6600
Rate: $69.00-$79.00

Hilton Garden Inn
1022 Carnegie Avenue
Cleveland, Ohio 44115
216-658-6400
Rate: $89.00

Holiday Inn Express
629 Euclid Avenue
Cleveland, Ohio 44114
216-443-1000
Rate: $79.00

Wyndham**
1260 Euclid Avenue
Cleveland, Ohio 44115
216-615-7500
Rate: $79.00-$91.00

Crowne Plaza
777 St. Clair Avenue
Cleveland, Ohio 44114
216-771-7600
Rate: $89.00

Holiday Inn Centre Lakeshore
1111 Lakeside Avenue
Cleveland, Ohio 44114
216-241-5100
Rate: $79.00

Embassy Suites
1701 East 12th Street
Cleveland, Ohio 44114
216-523-8000
Rate: $90.00-$110.00

Radisson
651 Huron Road
Cleveland, Ohio 44115
216-377-9000
Rate: $89.00

Days Inn Lakewood
12019 Lake Avenue
Lakewood, Ohio 44107
216-226-4800

**Engineering Preferred

GRANTS POLICY MANUAL

The Grants Policy Manual can be found at

http://www.csuohio.edu/uored/FUNDING/grants_policy_manual.pdf

This manual provides all the information needed in order to submit proposals through The Office of Sponsored Programs and Research.

HIRING FACULTY/PROFESSIONAL STAFF – OVERVIEW OF STEPS

1. Provide a Job Description to Compensation Analyst in Human Resources.
   Salary grade, job title, bargaining unit status, and FLSA status is determined and an email will be sent to the Dean's office.
2. New Positions: Position Number Request form (located on the HR website) must be filled out and submitted to the Budget Officer before the Vacancy Form can be submitted.

3. Create Search Committee.
   a. Choose minimum of three members – one member must be a union member of current negotiation union.
   b. Appoint a chair.
   c. Appoint a contact person, if desired, to handle paperwork and scheduling (usually done in the Dean's office).
   d. If a member of the Search Committee has not received Affirmative Action Search Committee Training, schedule training with Associate Director of Affirmative Action.
4. Complete **Faculty or Professional Staff Vacancy Form**. The Vacancy form should indicate that the candidate should submit hard copy application materials.
   a. Function statement from the Job Description should be used exactly as written in the area marked Duties on the form.
   b. The minimum and preferred qualifications as listed on the description should be listed exactly as written on the vacancy form.
   c. For "Salary Range", please indicate the minimum and maximum salary range amounts along with the term: "commensurate with experience". However, if there is a specific budgetary constraint, then list the minimum of the salary range along with the maximum amount budgeted for the position.
5. During a Hiring Freeze: positions must be approved by the President before Human Resources can approve the vacancy form (100% grant funded positions are excluded from this process).
   a. Complete a **Position Search Approval Form (PSAF)**
   b. Attach the Position Search Approval Form to the Vacancy Form.
6. Fill out the **Request for Advertising** form and attach ad copy to it. The ad copy must match exactly to the Vacancy form.
7. Submit the PSAF, Vacancy Form (prepared from approved salary grade, etc.) and Request for Advertising (prepared by Department) will be submitted to the Provost's Office.
8. Once the position is approved, the position will be posted and the Search Committee will begin receiving materials from candidates.
   a. Document name, address, phone, email, and date received. If candidate mails in resume, attach envelope to candidate materials as a record of the postmark date.
   b. The policy over the last 2-3 years in Engineering has been that no emailed application materials are acceptable. Applicant must be advised to resubmit hard copy if email application materials were received.
   c. Create a binder to hold everything received from all candidates and a copy of everything that you send out. Send a copy of all application materials to each search committee member.

    d. Send acknowledgement letters with the chair's signature and the AAO voluntary identification form. Make a copy of signed acknowledgement letter and put with candidate's paperwork.
    e. Check to make sure applications are complete. If they are not, it is up to the committee to determine whether or not to seek out missing pieces.
    f. If resumes are submitted after the submittal deadline, you do not need to process the resume. However, keep the submitted information unopened with the materials for the search. (If the search is reopened or deadline extended, the late resumes would then be able to be considered.) Send a letter to the candidate indicating that the material was received after the deadline.
9. Provide a copy of the job description to the candidates and to the union, if they request it.
10. Committee creates rating instrument based on the minimum and preferred requirements listed in the ad; this must be submitted to the Affirmative Action Office for approval.
11. Chair or contact person makes copies of the approved rating instrument and resumes and distributes a set to each committee member.
12. Verify with the Affirmative Action Office that the candidate pool meets the Affirmative Action Diversity Criteria. If it does not, the Affirmative Action Office will advise as to the specific steps.
13. Committee individually reviews the applications to see if they meet the qualifications; rating instruments are filled out by each member and returned to the chair or the contact person to record on the AAO Screening Report (available electronically from the Affirmative Action Office).
14. Chair or contact person of Search Committee submits the AAO Screening Report to the Affirmative Action Office for approval.
15. When approved, committee individually reviews the applications that have met the minimum against the preferred qualifications. They score each applicant.
16. Chair or contact person collects the review forms, records the rankings on the AAO Screening Report and submits it to the Affirmative Action Office for approval.
17. Complete **Part A** of AAO Form (from the Affirmative Action Office) by listing finalists (i.e. top scorers).
18. Submit AAO Form and Screening Report to the Affirmative Action Office.
19. Create a list of interview questions based on job description.
    a. Submit for approval to the Affirmative Action Office.
20. If all approved, schedule interviews
    a. Check for availability for committee
    b. Schedule a room
    c. Invite each candidates individually
21. Interview candidates.
22. Committee chooses candidates
23. Complete **Part B Final Review** of AAO Form.
24. Submit AAO Form to the Affirmative Action Office for approval.
25. When approved, send the candidate the Homeland Security Form prior to making an offer. Once the Homeland Security Form has been returned, make offer to selected candidate.
26. Send rejection letters to finalists.
27. Archive all files and documents. Keep for **6 years**.

28. If a suitable candidate was found, the search is complete. If not, you can reopen the search or close it.
29. When a candidate has selected a position, notify the Dean's Office; the Dean's Office will initiate the employment contract.

JOB DESCRIPTION REVIEW

Job descriptions will be reviewed at the time of the annual performance reviews. Any job description changes will be coordinated with the Human Resources department.

KEEPING STAFF INFORMED

Support personnel are a highly valued resource. In order to efficiently use this resource, Chairpersons are encouraged to meet at least once per month with staff to share ideas and gain insight.

MARKETING POLICY

All internal marketing efforts (e.g., flyers distributed to students and/or posted on bulletin boards, etc.) will be reviewed by the Chair. The Chair will maintain a folder of all internal marketing efforts. At the end of each academic year, the Chair will review all internal marketing efforts and purge those that are dated or otherwise no longer accurate.

All external marketing efforts (e.g., flyers, brochures, billboards, television ads, etc.) will be reviewed by the Associate Dean for Academic Programs and/or his/her designee. All external marketing will be forwarded to the department of Marketing and Public Affairs for their review prior to publication.

Please see the following Marketing and Public Affairs link for additional information:

http://www.csuohio.edu/advancement/marketing-pr/

New Employee Orientation Program & Paperwork Processing

Below please find details regarding the New Employee Orientation Program as well as the procedures for new employee paperwork completion. Please share this information with your HR liaison or department personnel as appropriate.

New Employee Orientation: Registration and Notification Process

Registration – Human Resources will automatically register new staff into orientation as notification is received regarding their start date. New employee start dates should coincide with the scheduled orientation dates. A full schedule of orientation dates is located on the HRD website.

Notification – Human Resources will not be sending any communication directly to new staff. It is important for the hiring department to communicate with their new staff to inform them of their start date. Hiring departments should coordinate new staff start dates with New Employee Orientation sessions.
The department is to inform new employees of the following:

1. They that they are to arrive at 8:30 a.m. in Human Resources in the Administration Center, AC 113, on their first day.
2. The Orientation Program begins promptly at 8:30 a.m. and will last until 4:30 p.m.
3. The new employee is to park in the CSU lot directly behind the administration building, off of Prospect, and, upon entering, indicate to the parking attendant that they are here for orientation. A one day parking tag will be provided to the new employee in the HR department.
4. The new employee will be asked to provide original documents verifying identity and work eligibility as required by the US Department of Homeland Security via the completion of an I-9 form.

If a department representative, such as the new supervisor, chooses to escort the new employee to the orientation or greet them in the Administration Center as they arrive for the 8:30 program that would be acceptable as well.

If the new employee's first day of employment is a non-orientation date, the employee must still come into HR for paperwork completion. Please note that, in this case, the department must comply with federal requirements for the proper and timely completion of the I-9 form.
The employee will also be automatically registered to attend the next available orientation date.

Supervisor Resources- Once a new employee is hired their assigned supervisor will receive an email containing links to a supervisor video and checklists to assist in effectively orienting new employees to the University and their specific department. All of the resources are located on the Human Resources (HRD) website.

New Hire Paperwork

Human Resources will now handle all first-day new employee related paperwork for Professional and Classified employees (paperwork for full-time Faculty and part-time lecturers should still be handled within the department or college). This includes the I-9 form, payroll and tax forms (such as the W-2, W-4) as well as the social security forms. The Ohio Ethics policy will be reviewed during the orientation program, but the new employee will submit the acknowledgement form back to their department (as is currently done).

Identity and employment eligibility (I-9) - Please be advised that, on their first day, if the new employee does not bring the needed documents for completion of the I-9 form for identity and work eligibility, they must return to Human Resources within three days to complete that paperwork.

Since Human Resources will be handling this paperwork, all new Classified and Professional employees must report to Human Resources on their first day of employment.

Standard Procedures

Classified staff - There is no change in procedures for Classified Staff new hires. All processing will continue to be handled within Human Resources. New Classified employees will be scheduled for the all-day orientation session on their hire date. Start dates for Classified employees will coincide with scheduled orientation dates.

Professional staff - For Professional Staff new hires, please continue to work closely with your area's HR Liaison. A list of current HR Liaisons appointments is attached. It is important to submit authorized new hire documents to your assigned HR Liaison as early as possible so that she/he may begin the processing and submit required documents to Human Resources. When the Department of Human Resources receives and processes the required documents, the new staff member will be recognized electronically in the administrative system and HR staff will register the new staff member for orientation.

The minimal required documents for a new Professional Staff hire are:

1. Authorized contract or Letter of Appointment (processed through all standard authorization processes)
2. Affirmative Action authorization for selection or waiver
3. Compensation authorization for salary (subsequent to receipt of DMA form)
4. PAW - Personnel Action Worksheet (green form)
5. PDW - Personal Data Worksheet (yellow form)
   - PDW completed in its entirety by the new employee **OR**
   - Preliminary PDW completed by departmental staff or HR Liaison with minimal identifying information: proper name, SSN, birthdate, signed by person completing form. (Signed by: so-and-so for xxxx,xxxx 'name of new hire')

Personal Data - The name, birthdate and social security number of the new hire is especially important in order for Human Resources to generate an ID number and as a first step in processing the hiring paperwork.

Contract delay? If, for some reason, there will be a delay in contact preparation, please provide your HR Liaison with minimal identifying information needed (preliminary PDW and preliminary PAW with name, hiring department, and start date) so that she/he may submit preliminary documents to HR per standard procedures so that an ID# may be assigned. Upon receipt of the authorized contract, the staff member can be processed as a hire and registered for orientation.

OFF-CAMPUS EQUIPMENT

The College recognizes that it is necessary for faculty and staff to take University owned resources off-campus.

To be eligible, faculty and staff must be currently employed by the College.

In addition to being familiar with the Interim Statement on Responsible Use of University Resources, faculty/staff must also complete the appropriate Equipment Loan Form and return it to the Center for Educational Technologies.

The "Equipment Loan Form" will document the name of the faculty/staff as well as the serial number of the equipment being loaned. This form is intended for loans made for a period of one semester (renewable as needed). The "Short Term Equipment Loan Form" is similar but is intended for loans made for a period of one week or less.

The Departments will keep the original forms in the Department with a copy of the form sent to the Dean's office. At the end of each Academic Year, this list will be reviewed by the Department and faculty/staff are contacted regarding their intent with off-campus equipment.

Long Term Equipment Loan Form Link:

http://www.csuohio.edu/engineering/2005Downloads/academic_information/FORM%20108%20_BG_Long_Term_Equipment_Loan_Form.doc

Short Term Equipment Loan Form Link:
http://www.csuohio.edu/engineering/2005Downloads/academic_information/FORM%20109_BG_Short_Term_Equipment_Loan_Form.xls

OUTSIDE CONSULTING

All faculty and administrators will be required to have prior approval before engaging in any form of outside employment. They are required to submit a memo for approval to the Department Chair and Dean. Once approved by the Dean, copies will be distributed accordingly:

- a copy will be placed in the faculty personnel file,
- the original will be filed in the "Outside Consulting" file
- a copy will be sent to the Chair,
- a copy will be sent to the faculty member.

All faculty and administrators are required to complete this process each year. According to the new CSU-AAUP agreement, the prior written approval of the Chair and Dean will be required for all outside employment activities other than those "having a minimal impact on the faculty member's university or professional obligations, e.g. keynote speeches, paid reviews of research articles, books or creative works, and tenure reviews for other universities.

PETTY CASH FORM

A Petty Cash Form is intended for reimbursement for small purchases and local travel on behalf of the University up to a limit of $150.00. Reimbursement is made only to CSU faculty, staff or students.

Specific instructions for completing the Petty Cash Form can be found on the back of the form.

Individuals requesting reimbursement must bring a completed Petty Cash Request Form and their valid CSU ID to the Cashier's counter in the Office of Treasury Services, University Center 460. Purchases and expenses must be in accordance with University policy. All reimbursements are subject to University audit. There is a limit of $150.00 per person per day allowable for reimbursement. Information regarding reimbursement for expenditures over $150.00 can be obtained through the Controller's Office.

Failure to follow University petty cash policies and procedures may result in revocation of authority to obtain reimbursements via petty cash.

PEOPLESOFT TRAINING

Procedures for training on PeopleSoft can be found at:

http://www.csuohio.edu/ist/peoplesoft.shtml

1. The requestor fills out the request form (http://www.csuohio.edu/ist/upload/PSrequest.pdf), obtains the Supervisor and the Department Vice-President/Provost signatures.

2. The Supervisor sends the completed request form to the Data Custodian (See website for breakdown).

3. The Data Custodian will review the request to determine if it should be approved.
   If no, the Data Custodian contacts the supervisor and they discuss the reason(s) for rejection
   If yes, the Data Custodian identifies exercises/training needed and approves request.

4. If the request if for Query Access, the Data Custodian forward the request to the IS&T Director for approval. Once it is approved by the IS&T Director, the request is forwarded to the Security area. If the request is NOT for Query Access, then the form gets forwarded to the Security area.

5. Security will advise Training Contact regarding the exercises required.

6. Training Contact will contact the client to discuss training the exercise options.

7. The client can either take training with the Training Contact or the client can do a "self study" course.

8. Once the client fulfills the training requirement, the client will be contacted by Security with a password for access.

PRINCIPLE INVESTIGATOR (PI) TRAINING

The mission of the Office of Sponsored Programs and Research is to promote and advance research, scholarship and creative activity of faculty, staff, students and the community and assist in securing necessary resources through institutes, facilities and partnership programs.

The Grants Policy and Procedures Manual can be found at:

http://www.csuohio.edu/uored/FUNDING/grants_policy_manual.pdf

Other important information on the Office of Sponsored Programs and Research website can be found at the following link:

http://www.csuohio.edu/uored/PolProc.html

Items include:

- Affirmative Action Policy
- Ohio Code of Ethics Law
- CSU Conflict of Interest Policy
- Institutional Description
- Invention Disclosure Form
- IRB Human Subjects Policy
- CSU Purchasing Policy
- Release Time Form
- Scientific Misconduct Policy
- Start-up & Recruitment Program
- Travel Policy
- IACUC Laboratory Animals Policy
- Contact the Director of OSPR

The Office of Sponsored Programs and Research (OSPR) offers to new and returning faculty and staff a new training workshop. In an effort to help the community identify grant resources, and to work easily and efficiently with the staff, OSPR will offer a workshop overview of the office, its functions and services. This is a one-hour program. It will discuss:

- pre-award services that they offer,
- assistance with budget and grant narrative development,
- completing internal forms such as the Proposal Transmittal Form (PTF),
- post award services such as helping researchers deal with compliance issues,
- contract and subcontract issues,
- an initial introduction to Grants.gov.

More detailed workshops in PTF instruction, budget development, working with Grants.gov, and other grants related issues are planned during the academic year.

PURCHASE REQUISITION

The Purchasing policy can be found in its entirety here:

http://www.csuohio.edu/controllers/purchasing_policy.html

Purchase Requisitions are for payments to vendors that exceed $1,000.

Purchase orders issued for $50,000 or less require the approval of the Director of Purchasing Services; purchase orders between $50,001 and $100,000 require the approval of the Controller; purchase orders between $100,001 and $349,999 require the approval of the Vice President for Finance and Administration; purchase orders between $350,000 and $499,999 require the approval of the President; and purchase orders issued for $500,000 or more require the approval of the Board of Trustees.

Purchasing is charged with locating the best vendor at the best price. No individual outside of Purchasing has the authority to enter into purchase contracts, or in any way to obligate CSU.

You may indicate a preferred vendor on the Purchase Requisition; however, Purchasing will confirm or uncover alternate solutions.

In the event that an item or service is considered a sole source by the requisitioning department, a written explanation must accompany the requisition stating the reasons for considering this a sole source item. Also, to be given consideration, a statement shall be included listing vendors who have been contacted in an effort to find a compatible item or service.

All Purchase Requisitions must be submitted to the Dean's Office for review and signature. The Dean's Office will forward to Purchasing for processing.

In most cases, Purchasing will issue a Purchase Order and order the goods. A Purchase Order encumbers funds on an account. When payment is made to the vendor, the encumbrance is released and the funds expensed.

When a Purchase Requisition is submitted with an invoice to pay, Purchasing gets very upset as this does not allow them to do their job and is in direct violation of CSU policy. Every attempt should be made to submit the Purchase Requisition with sufficient lead time to allow Purchasing to identify the best vendor.

In the event a department orders goods or services without going through Purchasing, a letter must be submitted explaining the specific reasons why procedures were not followed; this type of negotiation is considered an unauthorized purchase and the individual could be personally liable for the purchase in accordance with Section 3.12 of the Ohio Revised Code.

RECONCILING ACCOUNTS

Why is reconciling important?

Reconciliation is an important part of cash control procedures. It is the only way you can be assured there are no errors or irregularities; it is the only way you can verify what is in your department budget, your fac_devel budget as well as your lab_fees budget.

What is reconciliation?

Reconciliation is the process by which you take your department balance and match it to the balance on your statement of operations.

Reconciliation is a two pronged process:

1. Reviewing the things you have recorded in your departmental books but that have not cleared the transaction register (such as outstanding Small Order Forms, Purchase Requisitions, Budget Transfer Requests, etc.), and

2. Reviewing the things that have cleared the transaction register but that have not been recorded in your departmental books (Plant Service Requests, Long-Distance charges, etc.)

Department books will likely never agree with the balance shown on the statement of operations because of the delay in checks and deposits clearing PeopleSoft, automatic charges and credits you haven't recorded, and errors that may have been made.

Goals to accomplish when you reconcile:

- Verify that all transactions belong to your department
- Verify what is available in your department budget

Preparing reconciliation:

1. When the month closes, run a transaction register and a statement of operations.

2. Using the transaction register, compare the current month's activity to your outstanding Small Order Forms, Purchase Requisitions, Journal Entries, Budget Transfer Requests, etc. Note all differences in the dollar amounts. Items that have not cleared remain outstanding for the following month. Items that are outstanding for two consecutive months are issues that require additional follow-up for resolution.

3. Review items on the transaction register that you were not previously aware of. Confirm with Accounts Payable and/or Purchasing if necessary that these charges belong to your department.

4. File all backup documentation for items that have hit the statement of activity. Keep outstanding items in a separate file.

5. Using the statement of operations, review budgets to ensure that are sufficient. If necessary, forward a Budget Transfer Request to the Dean's Office for processing. This should be done monthly for all accounts between 0300 and 0999.

REFRESHMENTS

The Refreshment Policy can be found here:
http://www.csuohio.edu/controllers/policy_refreshments.html

It applies to only when University funds will be used to purchase food and/or non alcoholic beverages and does not replace the Meals and Incidentals expenses that travelers may be reimbursed when traveling on University related business.

With appropriate approvals, refreshments may be paid for by University funds for:

- Meetings between University employees and outside parties where the primary purpose of the meeting is to conduct University business.
- Occasional gatherings of employees if there is a valid public purpose, such as a seminar, retreat, workshop, orientation or other University function.
- Events intended to recognize the employee contributions (e.g., holiday or retirement celebrations).

Refreshments may NOT be paid for by University funds for:

- Events which are of a personal nature (e.g., birthdays, weddings, baby showers, etc.).
- Alcoholic beverages.

Before ordering or purchasing refreshments for a meeting, the following must be submitted to the Dean via the Dean's Office Administrative Coordinator (email is preferred since it can quickly be reviewed and forwarded/returned as necessary):

Date of event
Name of event
Purpose of event
Approximate number of employees in attendance
Approximate number of outside parties in attendance
Cost estimate
Source of funds

The Dean/Administrative Coordinator will review the request, obtain additional approvals and notify the Chairperson or requestor once the approvals have been obtained.

Approvals are not automatic or guaranteed and approvals sought after the fact may be denied and the employee may forfeit potential reimbursement.

Blanket approvals may be granted for specified periods in the case of standing meetings (e.g., faculty meetings, lecture series, etc.).

Payments to vendors and reimbursement requests should be submitted on a Small Order Form or Purchase Requisition and must include a copy of the approvals AND the original, itemized, paid receipt (a credit card receipt is not sufficient).

RESPONSIBLE USE OF UNIVERSITY RESOURCES AND DOWNLOADING INFORMATION FROM THE INTERNET

The CSU Interim Statement on Responsible Use of University Resources states:

> The use of university computing resources, like the use of any other university-provided resource and like any other university-related activity, is subject to the normal requirements of legal and ethical behavior within the university community. Thus, legitimate use of a computer, computer system, or network does not extend to whatever is technically possible.

In addition, all users of University computing resources must comply with all Federal, Ohio, and other applicable laws; all generally applicable university rules and policies; and all applicable contracts and licenses.

Occasionally, it may be necessary to use a program, file, music or movie that exists on the internet. However, these may prove harmful to University computer equipment or be copyrighted. In an effort to limit the University's exposure, all College faculty, staff and students will adhere to the following regarding the use of University computing resources and copyright information:

Interim Policy on Responsible Use of University Computing Resources
http://www.csuohio.edu/ist/computingpolicy.htm

Article 28.31 of the Faculty Senate Policies and Procedures
http://www.csuohio.edu/faculty_senate/patcop.html

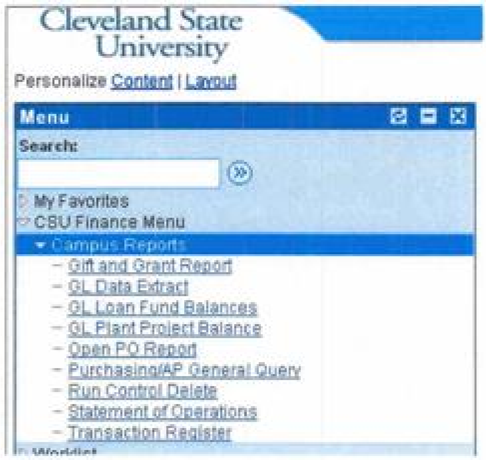
Copyright Law of the United States and Related Laws Contained in Title 17 of the United States Code
http://www.copyright.gov/title17/

Users who violate this policy may be denied access to university computing resources and may be subject to other penalties and disciplinary action, both within and outside of the university.

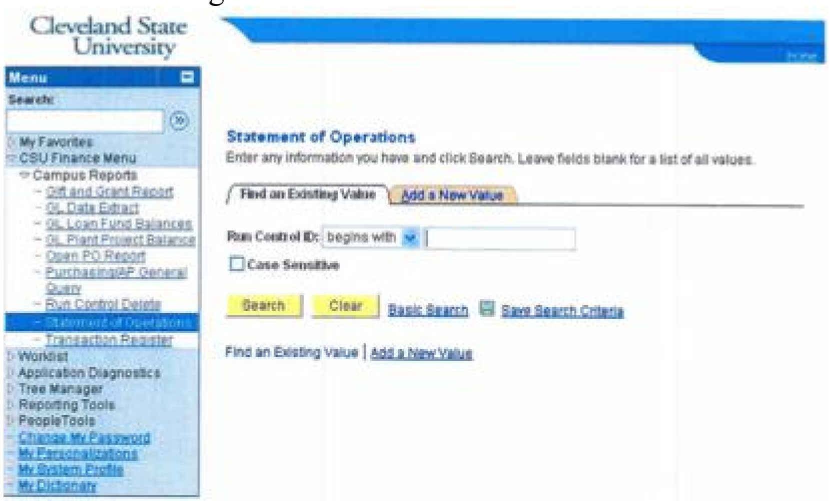
RUNNING REPORTS AND DOWNLOADING TRANSACTION REGISTER TO EXCEL

Running Reports

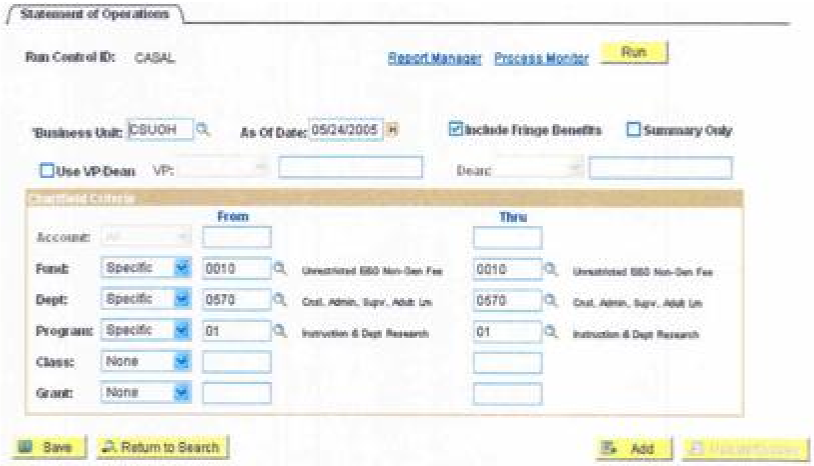
CLICK CSU Finance Menu >> Campus Reports >> Select Report



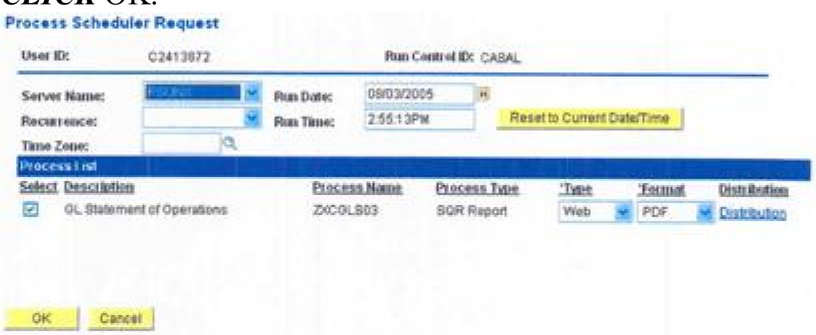
ENTER Existing Run Control ID or Add a New Value



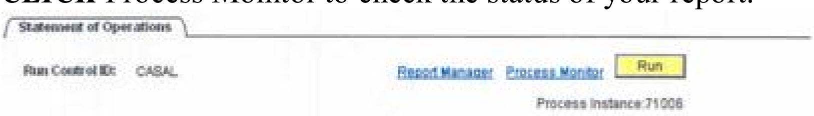
ENTER Chartfield information
CLICK RUN



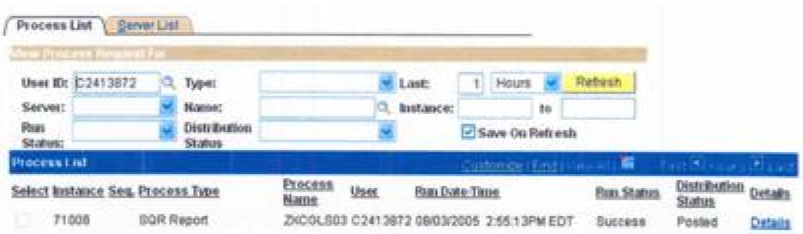
CHECK Server Name=PSUNX, Type=WEB, Format=PDF
CLICK OK.



PeopleSoft will return to the previous page and will display a “Process Instance” number.
CLICK Process Monitor to check the status of your report.

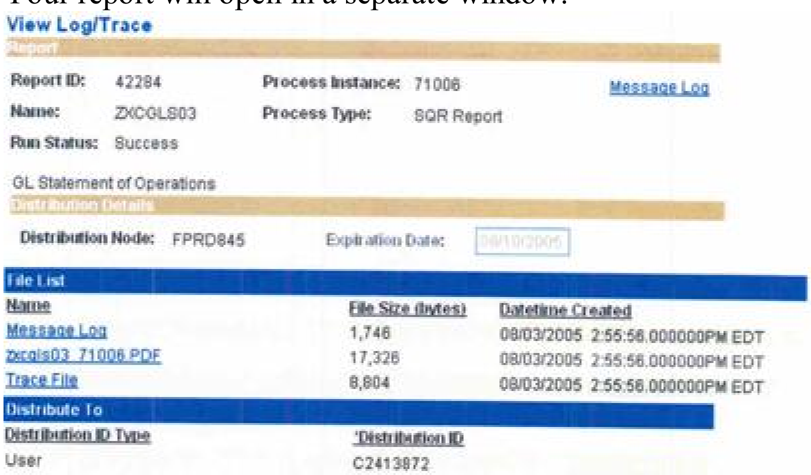


When your report is ready to be viewed, Run Status=Success, Distribution Status=Posted.
CLICK Details.

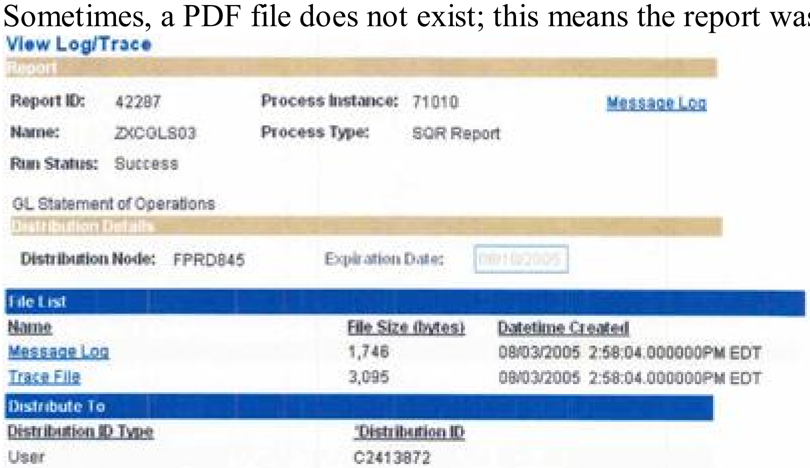


CLICK View Log/Trace.

CLICK the generated PDF file from the File List.
Your report will open in a separate window.



Sometimes, a PDF file does not exist; this means the report was unsuccessful.



All reports are generated from an input screen. If a financial report is unsuccessful, likely, it is due to the way the information was entered.

Four typical reasons why a report is unsuccessful:

1. Account, Fund, Dept, Program, Class or Grant is set to Specific, but Thru value is missing.

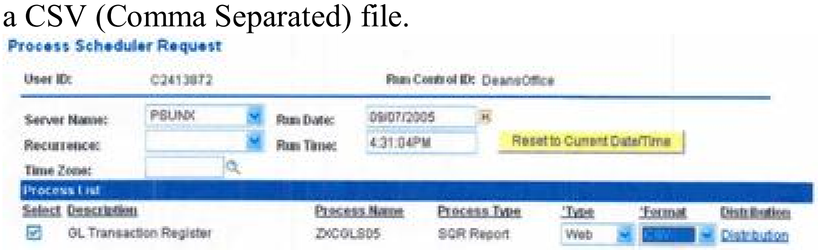
2. “Current Month Only” selected, but there were no transactions that month.

3. Account is None or is Specific with no values.

4. Date is missing.

Downloading Transaction Register to Excel

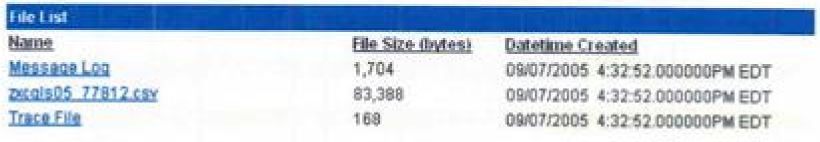
After you ***CLICK*** Run for the Transaction Register, you have the option to change the format to a CSV (Comma Separated) file.



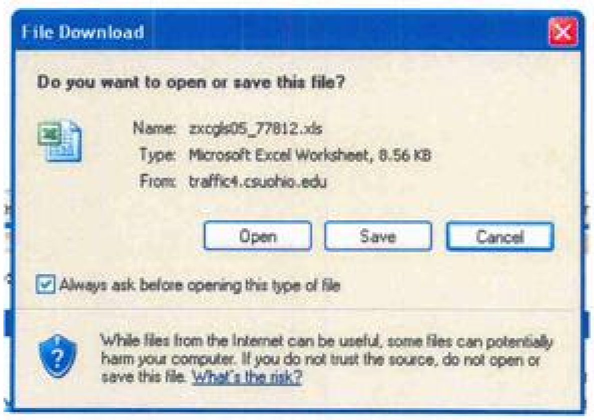
When your report is ready to be viewed, Run Status=Success, Distribution Status=Posted. ***CLICK*** Details.

CLICK View Log/Trace.

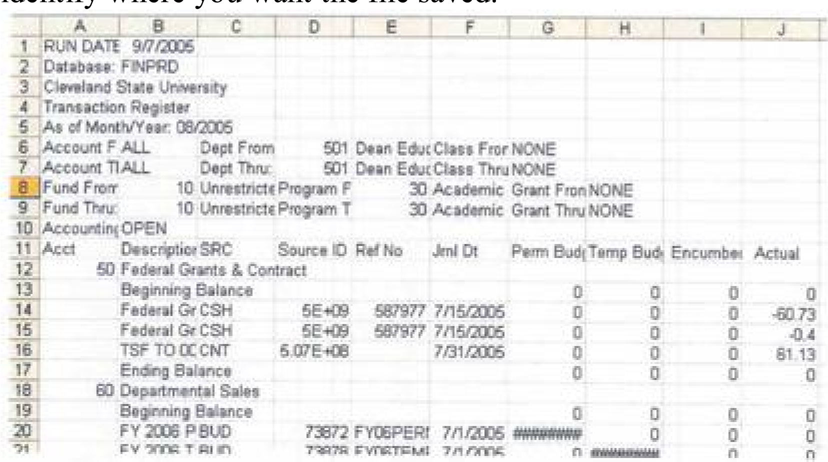
CLICK the generated CSF file from the File List.



You will get a dialog box, asking if you want to open or save the file.



CLICKing Open will open the file in a separate window. ***CLICK***ing Save will prompt you to identify where you want the file saved.



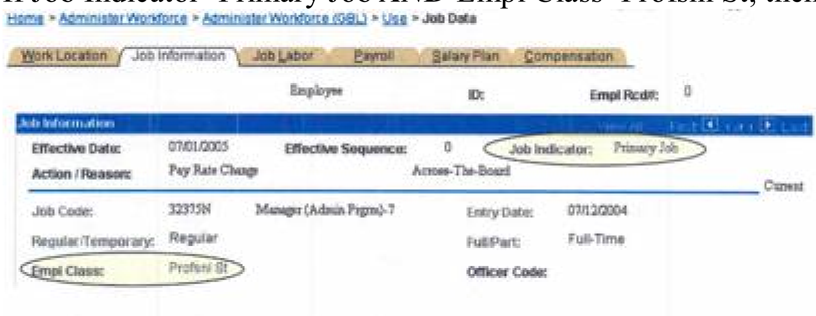
	A	B	C	D	E	F	G	H	I	J
1	RUN DATE	9/7/2006								
2	Database: FINPRD									
3	Cleveland State University									
4	Transaction Register									
5	As of Month/Year: 08/2006									
6	Account F	ALL	Dept From	501	Dean Educ	Class Fror	NONE			
7	Account Ti	ALL	Dept Thru:	501	Dean Educ	Class Thru	NONE			
8	Fund Fror	10	Unrestricte	Program F	30	Academic	Grant Fron	NONE		
9	Fund Thru:	10	Unrestricte	Program T	30	Academic	Grant Thru	NONE		
10	Accounting	OPEN								
11	Acct	Descriptior	SRC	Source ID	Ref No	Jrnl Dt	Perm Budg	Temp Bud	Encumber	Actual
12	50	Federal Grants & Contract								
13		Beginning Balance					0	0	0	0
14		Federal Gr	CSH	5E+09	587977	7/15/2006	0	0	0	-60.73
15		Federal Gr	CSH	5E+09	587977	7/15/2006	0	0	0	-0.4
16		TSF TO OC	CNT	5.07E+08		7/31/2006	0	0	0	61.13
17		Ending Balance					0	0	0	0
18	60	Departmental Sales								
19		Beginning Balance					0	0	0	0
20		FY 2006 P	BUD	73872	FY06PERI	7/1/2006	########	0	0	0
21		FY 2006 T	BUD	73878	FY06TEMI	7/1/2006	0	########	0	0

SINGLE-TERM CONTRACT APPROVALS

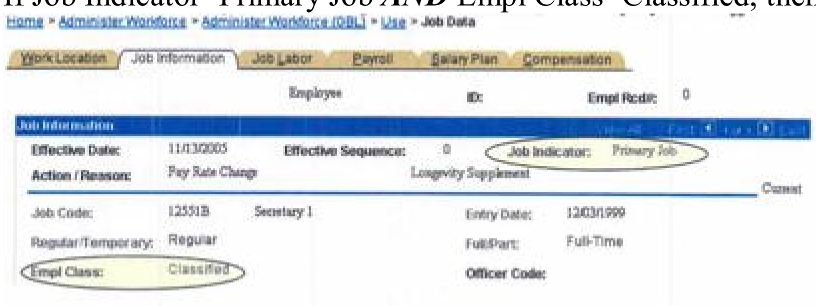
Before you issue a contract and obtain approvals, you must first know if the employee is ***staff***, ***lecturer*** or ***faculty***.

To do this, look at the "Job Information" panel in Job Data. (Note: Make sure you are looking at the person's primary job.)

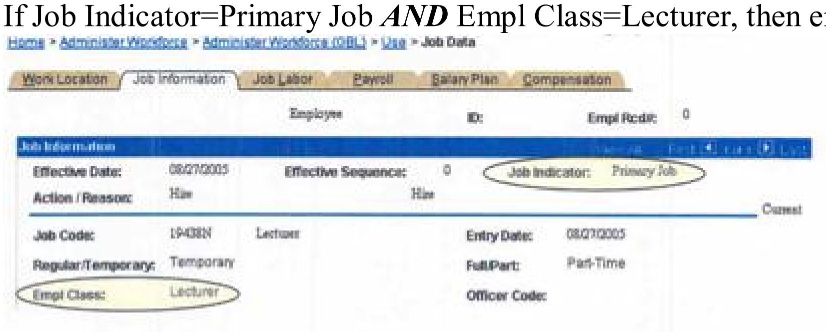
If Job Indicator=Primary Job ***AND*** Empl Class=Profsnl St, then employee is ***staff***.



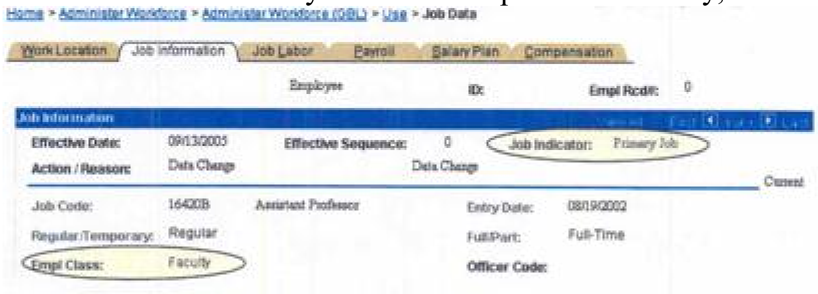
If Job Indicator=Primary Job ***AND*** Empl Class=Classified, then employee is ***staff***.



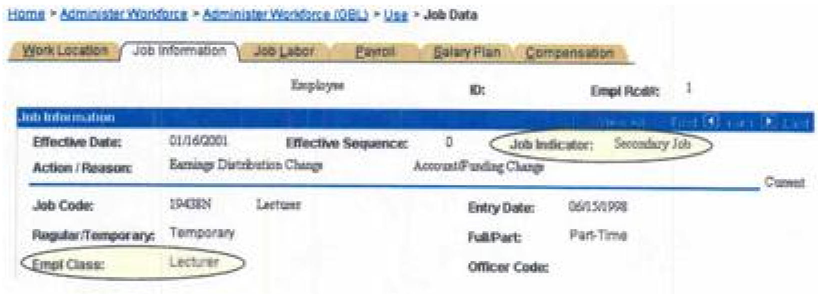
If Job Indicator=Primary Job ***AND*** Empl Class=Lecturer, then employee is ***lecturer***.



If Job Indicator=Primary Job ***AND*** Empl Class=Faculty, then employee is ***faculty***.



If Job Indicator does not =Primary Job, you cannot rely on the panel to determine if the employee is ***staff***, ***lecturer*** or ***faculty***, regardless of the Empl Class. In these cases, contact Kelly Snow for assistance.



Staff Approvals

All Part-Time Single Term Instructional and Non-Instructional Contracts issued to Staff must be approved by the Chairperson, the Staff's Supervisor, Compensation and the Dean. To expedite the process, the approvals should be obtained via email. The email can be printed and attached to the contract.

Issuing a Staff Contract

1. Chairperson or his/her designee contacts Staff regarding work assignment including proposed salary.
2. Staff (or Department on behalf of Staff) forwards work assignment and requests permission for his/her supervisor to do the work.
3. Supervisor approves.
4. Staff (or Department on behalf of Staff) forwards the response to Compensation (Maria Krasniansky/Jean McCafferty) along with the following information:
    a. Normal work schedule without additional work assignment (Ex: M-F, 8-5).
    b. Explanation as to how any time missed from normal work schedule will be made up (i.e., flex time, vacation, etc.). (Ex: Will take :30 vacation on days scheduled for additional work assignment.)
5. Compensation replies to Staff, Supervisor and Department.
6. ***Department issues contract***.
7. Chairperson signs contract.

8. Department submits the contract with approvals to the Dean's Office for review and signature.
9. Dean reviews contract, signs and returns to Department.
10. Department obtains signature of Staff and returns contract to Dean's Office.
11. Dean's Office forwards contract along with all approvals to Human Resources.

Lecturer Approvals – All Part-Time Single Term Instructional and Non-Instructional Contracts issued to Lecturers must be approved by the Chairperson and the Dean.

Issuing a Lecturer Contract

1. Department issues contract.
2. Chairperson signs contract.
3. Department submits the contract to the Dean's Office for review and signature.
4. Dean reviews, signs and returns contract to Department.
5. Department obtains signature of Lecturer and returns contract to Dean's Office
6. Dean's Office forwards contract to Human Services.

Faculty Approvals – ALL Overload Instructional and all fall and spring Part-Time Single Term Non-Instructional Contracts issued to Faculty must be approved by the Dean, Provost and, in some cases, the Office of Sponsored Research. Before issuing a contract, the Chairperson should request approval from the Dean. All other approvals, as necessary, will be obtained by the Dean's Office.

Issuing a Faculty Contract

1. Chairperson requests Dean's approval via email with the following information:
    a. Type of additional assignment (Ex: EDT 301, Facilitator for XYZ, etc.)
    b. Time period (Ex: Fall semester, April 3-6, etc.)
    c. Salary
    d. Source of Funds
2. Dean's Office reviews, approves and obtains additional approvals if necessary.
3. Dean replies to Chairperson.
4. ***Department issues contract***.
5. Chairperson signs contract.
6. Department submits contract to the Dean's Office for review and signature.
7. Dean signs and returns to the Department.
8. Department obtains signature of Faculty and returns contract to Dean's Office.
9. Dean's Office forwards contract along with approvals to the Provost's Office and/or Human Resources.

SMALL ORDER FORM

The Purchasing Policy can be found in its entirety here:
http://www.csuohio.edu/controllers/purchasing_policy.html

Specific instructions for completing the SOFs can be found on the back of the form.

The Small Order Form (SOF) is a vehicle for departments to issue payments to vendors. The dollar limit of the SOF is $1,000, regardless of the source of funds.

The practice of grouping SOFs to the same vendor for which the total sum exceeds $1,000 in an effort to get around the $1,000 limit is expressly prohibited.

Anytime a department uses a SOF to reimburse or pay for refreshments, the necessary approvals ***must*** be attached.

Departments may submit SOFs directly to Accounts Payable for processing, except when the SOF is to reimburse a Chairperson or Director. In these cases, the SOF should be submitted to the Dean's Office for a counter signature.

SPECIAL PAYMENT FORM

The Special Payment Form can be found here:
http://www.csuohio.edu/HRD/Forms/Internal/Special%20Pmt%20Form.pdf

The purpose of the form is:

1. Processing one-time payments when the amount is small and the period of time over which services are performed is short.
2. Payments exceeding $500, and multiple payments made to the same person within one calendar quarter will be reviewed by Human Resources.
3. Completion of the form does not make the individual eligible for electronic services such as email, web access, etc.

Departments should carefully review their use of this form; when making multiple payments to the same individual or when the time period is not short, a Single-Term Non-Instructional Contract may be more appropriate.

Completed forms should be routed through the Dean’s Office for review and approval.

TECHNOLOGY EQUIPMENT PURCHASE AND INVENTORY PROCEDURE

Purchase

1. All technology equipment orders/purchases funded by Engineering Tech Fees, University Tech. Fee, University House Bill Money, or the Fenn College of Engineering Dean's Operating Funds are to be made in consultation with the Dean of Engineering.
2. All Purchase Orders and Small Order Forms for technology equipment orders/purchases funded by Tech Fees, House Bill Money, or the Fenn College of Engineering Dean's Office are to be sent to the Engineering Budget Manager, who will maintain a record of all such orders and process them in accordance with University procedures.
3. All technology equipment ordered/purchased in the Fenn College of Engineering is to be delivered to the ordering Departments.

Inventory

1. The Budget Manager will maintain an inventory of all technology equipment purchased under Engineering Tech Fee, University Tech Fee, University House Bill or Fenn College of Engineering Dean's Operating Funds..
2. The college inventory of technology equipment will be maintained on a secure server.

Records of all other equipment purchases made by individual departments either grant or operating dollars, are approved by the Dean and copies housed in the individual Departments.

TECH FEES

Mandatory Tech Fees is the general term used for all fees collected by the College or department. These are the fees collected from students for taking a certain course and are typically for costs associated with maintenance of undergraduate and graduate instructional labs. Fees can only be used for the purpose for which they were first approved. These fees appear on the Transaction Register and the Statement of Operations. During Fall Semester, the Dean and Chairpersons review all fees for reasonableness and accuracy; changes are made as appropriate.

Mandatory College of Engineering Tech fees are deposited into 00XX-0010-0604-01. Expenses that meet the above criteria and are approved by the Dean are expensed from the Tech Fee fund. A record of all Tech Fees is maintained in the Budget Manager's office.

For academic departments, these fees are collected for taking a certain course and are typically for costs associated with lab supplies used in the instructional activity.

TRAVEL APPROVAL AND EXPENSE REPORT

Pre Travel Approval

All forms must be an original, red numbered form provided by CSU typed or legibly printed.

Attach to the travel form a copy of the "request to present" or Workshop/Conference information (location, times, dates, hotel availability, topics, etc.) This can generally be obtained from the sponsor's website.

Attach the prior approval email/letter from the Department Chair/Dean for a rental car to the travel form. In addition, if traveling locally, the traveler must obtain approval from Risk Management to rent a vehicle.

Copies of emails or letters from individuals (Dean, Department Chair, etc.) who are financially supporting the travel should also be attached.

Block 1: Name (alpha)

a. Must be a CSU employee or student
b. Typed or legibly printed

Block 2: CSU ID Number (numeric)

Block 3: Department Name (alpha)

Block 4: Destination: (alpha)

a. City and State
b. Use the city where the conference, workshops, and/or meetings are being held.
c. May contain more than one location if staying overnight in both locations

Block 5: Purpose (alpha)

a. Give Name of event and purpose of your attendance i.e., attend or present at and give the name of conference, workshop or organization holding the event, Mileage for Site visits or Student Supervision, etc.
b. Insufficient purposes are: Meeting, Present at Conference, Mileage, or Professional Development.

Block 6: Per Diem Rate (alpha)

a. This block is used for the Meal and Incidentals rate only.
b. Use the city where the conference, workshop or meeting is being held unless the traveler is in multiple locations during the day. Then use the city where the hotel is located. If staying at two different hotels at different times list the per diem rates for both locations.
c. The meal rates link for both domestic and foreign travel is located on the Controller's Travel Policy web page.

d. In instances where the Incidental rate is listed separately, add it to the meal rate.
e. The foreign meal rate changes more frequently than the domestic rate. Please use the rate that applies to the period in which the travel will occur as well as checking upon return to make sure it hasn't changed.

Block 7: Estimated Expenses (numeric)

a. Provide a reasonable estimate total of expenses.
b. **Do not itemize your estimate on this form.** Use a separate sheet of paper if itemization is necessary.

Block 8: Portion to be Paid by CSU (alpha or numeric)

a. If all the expenses are to be paid by CSU, either 100% or "All" is appropriate in this box.
b. If only a portion of the expenses are to be paid by CSU, use that amount.

Block 9: Dates of Travel (numeric)

a. Provide the dates of the conference.
b. If necessary the addition of one day before and after the conference for travel time is permitted.

Block 10: Requested Prepayments (numeric)

a. Do not use this section for estimating travel expenses. Use a separate sheet of paper for itemizing the estimate.
b. Airfare and registration are generally the only prepayments CSU will approve. A purchase requisition or small order form can be requested from the Department office **after** approval for travel has been obtained. A copy of the approved travel form must accompany the prepayment SOF and/or Purchase Requisition.
c. If the traveler prefers to use their credit card, the travel form will be the method of reimbursement. It is not a CSU prepayment. In almost all instances, reimbursement for personal payment of travel expenses will be made after the travel has been completed.

Block 11: Approval (alpha)

a. Prior approval and authorization for travel must be obtained from your Supervisor/Department Chair, Dean, and PI (if the travel is grant funded). This includes travel forms for local mileage reimbursement.
b. The Provost must approve all foreign travel prior to the trip taking place.

Block 12: Account(s) to be Charged (numeric)

a. Provide all of the accounts to be charged for the travel. If the account to be charged is another College or Department (including the Dean's Office), attach a copy of the email or letter authorizing the expense and amount to be charged

b. If an explanation of the accounts to be charged is needed, attach it to the travel form. Do not write in an account description if the account number or GrantID is not known. A note on a separate piece of paper should be sufficient to determine what account is to be charged.

While Traveling

Retain all receipts for reimbursement including those items prepaid.

A. Include all receipts even if the amount to be reimbursed is less than the expenses. The traveler may be eligible to claim the un-reimbursed business expense portion on their Federal Income Tax Return. (Consult with a tax person before claiming.)

B. Airline (including CSU prepaid tickets)
- Airfare receipt showing the amount paid for the ticket. This should include
  - The booking receipt from Travel Agency or
  - The printed internet confirmation of ticket purchase showing cost and method used for payment when using such websites as Orbitz, Continental, etc.
- All Seating tickets.
- It is not necessary to include the envelope(s) given out at the airport.

C. Rental car receipt.

D. Hotel receipt.

E. Airport parking receipt.

F. Conference/worksheet registration receipt.

G. Taxi, train, trolley or shuttle bus receipts

H. Conference schedule

I. No meal receipts are necessary as CSU uses per diem for reimbursement (please also refer to Block 20 for pre-approved business lunches).

J. If driving to and from the conference, workshop or meeting, a print out of Map Quest.
- If leaving from home, show mileage to/from destination and mileage from your home to CSU
- If leaving from CSU, show mileage to/from destination.

If in doubt, keep the receipt.

Completing the Travel Form

The cleaner the travel form, the faster it can be reviewed and sent for reimbursement. The travel form must be submitted after completion of travel unless prepayment of registration by CSU is the only expense incurred. The Travel form should be completed and filed with the appropriate supervisor within two weeks of the travel completion date.

Receipts should be attached securely to the back of the travel form in such a manner that they can easily be read by the reviewer or auditor. Preferably, they should all face the same direction with numerous small receipts taped to blank pieces of paper (mounted in the same direction) and attached to the back of the travel form.

Note: CSU will reimburse business expenses only.

Block 10: Requested Prepayments (Numeric)

a. Enter in the Common Carrier line the dollar amount of the prepayment. To the left of the line indicate the SOF or Purchase Requisition number drawing an arrow to the related prepayment.
b. Follow the above procedure for prepaid registration.
c. These amounts will be totaled and carried to the "Less Prepayments" line in Block 26.

Block 13: Date (Date)

a. Each day of travel in date format should be listed on a separate line in consecutive order.
b. If necessary lines can be split horizontally to allow for additional space for additional days of travel.

Block 14: Time Depart/Return (Numeric)

a. Times are important as they regulate the meal per diem.
b. Record time started and arrived at location i.e., left home/office, arrived home/office.
c. Reasonableness is required.

Block 15: Travel Point (Alpha)

a. The first day of travel (first line) would normally be From Cleveland To (name of destination.) Unless the travel is overnight, On the last travel date line state the place of departure to Cleveland.
b. If you are staying overnight in another city or destination, on the date lines please indicate from and to on both dates of travel.

Example:	7/31/06	From Cleveland to Phoenix
	8/3/06	From Phoenix to Santa Fe
	8/5/06	From Santa Fe to Phoenix
	8/8/06	From Phoenix to Cleveland.

Block 16: Transportation/Common Carrier/Explanation

a. On the first line, first day of travel, under Common Carrier enter the total amount of the airfare, bus fare (if long distance), or train fare. In the Transportation/Explanation column, same line, state whether it is airfare, bus fare or train fare.
b. This column is not for mileage or cab fare.

Block 17: Transportation/Amount/Explanation

a. The dollar amount being claimed for personal auto mileage or rental car expense is recorded in the Transportation/Amount Column.
b. The personal auto mileage to and from the travel destination should line up with the date(s) in Block 13 and travel point in Block 15.
c. In the Transportation/Explanation, Block 18 column, insert the number of miles driven on that day and the mileage rate used to determine the reimbursement amount in Block 17.

Block 17: Transportation/Amount/Explanation

a. The rental car expense and explanation should be listed on the day the car is returned and the invoice is paid.
b. Rental Car expense is to be recorded in the Transportation/Amount and the description "Rental Car" in the Transportation/Explanation column. The approval for the rental car must be attached to the back of the form.
c. Mileage will be reimbursed for personal auto in lieu of airfare when the airfare of all persons traveling in the car is greater than the mileage. If the combined airfare is less than the mileage, the airfare amount will be reimbursed.
d. Per the Controller's Travel Policy "Mileage while commuting to and from work will not be reimbursed. Mileage while commuting from home to an off-campus location may be reimbursed, but only to the extent that it exceeds mileage from the employee's home to CSU's campus."
e. The current mileage rate is located within the Controller's Policy web pages.

Block 19: Lodging (Numeric)

a. An itemized, paid hotel bill is needed.
b. When calculating the amount spent on lodgings list only the daily room charge and associated tax.
c. List each daily charge on each of the appropriate "date" lines. Do not record the lump sum total for all days.
d. Do not request reimbursement from CSU for room service, in-room meals, the spa, gym, etc.
e. When sharing a room <u>and</u> sharing the hotel bill with non CSU person, note this in Block 28 i.e. "shared room with non CSU person(s)" and indicate how the hotel bill was split in Block 28.
f. If the hotel room and bill is split between you and a CSU employee(s), please list the other CSU travel form number(s) and how the expense split was determined in Block 28.

g. If you have paid for another CSU traveler's room, include the entire amount of the hotel charge on your travel form and indicate the other person's Name and Travel Form Number.
h. If someone else pays for your lodging, indicate such in Block 28 include their name and travel form number.

Block 20: Meals

a. The traveler will be reimbursed for meals and incidental expenses according to the Federal Standard Meal Allowance (FSMA) then in effect.
b. Allowable reimbursements vary by city. Rates for most major cities can be accessed from the University's web site.
c. Generally, there will be no reimbursement for meals unless the traveler is away from home over night. However, with supervisory approval, when the traveler is away from home for more than 12 hours and lunch is not provided, the traveler may be reimbursed for the lunch portion of the applicable FSMA (indicate times of departure and return on the Travel Approval and Expense Report).
d. Reimbursement for the day of departure and the day of return is equal to 75% of the FSMA.
e. If the travel is to more than one location in one day, use the FSMA for the city where the traveler has overnight accommodations.
f. There will be no reimbursement for alcoholic beverages.
g. Tips and gratuities are included in the FSMA.
h. Actual and reasonable expenses for a qualified business meal may be claimed for the traveler and non-university guest(s). The traveler must submit an original itemized receipt along with an explanation of the business purpose of the expense. An overnight stay is not required.
i. Do not include meal receipts with your travel form unless:
    1) You have taken others to a business lunch or dinner <u>and</u>
    2) You have written prior approval for the expenditure. The written prior approval must be attached to the travel form.
    3) The receipt must be itemized to ascertain that no alcohol has been served.

Block 21: Miscellaneous Amount (numeric)

a. Enter amounts for business expenses not listed elsewhere for which you have receipts.
b. This can include business (not personal) telephone calls, internet access, parking fees, conference registration, and cab fare.

Block 22: Miscellaneous Explanation (alpha)

a. Enter description of expenses listed in Block 21.
b. Enter meals provided by conference or others.

Block 23: Total all columns (numeric)

Block 24: Total across all column totals to a grand total.

Block 25: Total to be Paid by CSU

a. This includes all items that are to be paid by CSU including the prepaid items.
b. This is to be the total CSU is reimbursing you and may not be the total of your expenses. Example: Total expenses = $1,500. Your travel allowance $1,000. Enter $1,000.

Block 26: This is the total amount of your prepayments. Include your prepaid registration and airfare as they have been recorded on your travel form and thus in your total expenses and should be deducted.

Block 27: This is the balance to be reimbursed to the traveler; Block 25 minus Block 26. Carry the Balance Due Employee to the account lines reimbursing the travel.

Block 28: See Block 19. Can also be used to explain why per diem or lodging is not being taken i.e., "stayed with family," "all meals provided by conference", "airfare provided by . . .", "registration not required, presented and lead discussion groups," etc.

Block 29: The Traveler must sign the Traveler's Approval and Expense Report.

Block 30: Approvals are required from the traveler's supervisor(s) and individual(s) paying any portion of the reimbursement (Grant PI, Dean, etc.).

When completed, it is recommended you make a copy for your records. Turn the travel form into your Department Chair.

The form will be reviewed, signed and sent to the Dean's Office for further review.

At any time during the process the travel form may be returned for missing information, documentation or corrections. If the travel form is correct, it will be submitted for the Dean's signature and forwarded to Accounts Payable for processing.

Applicable Web Pages

CSU Travel Policy
http://www.csuohio.edu/controllers/policy_travel.pdf

Mapquest Driving/Mileage
http://www.mapquest.com/directions/

Domestic Per Diem Rates
http://www.gsa.gov/perdiem

Foreign Per Diem Rates
http://www.state.gov/m/a/als/prdm/

Foreign Conversion rates
http://www.oanda.com/convert/classic

CSU Driving and Motor Vehicle Policy
http://www.csuohio.edu/riskmanagement/driving.html

CSU Cleveland State University

TRAVEL APPROVAL AND EXPENSE REPORT

TRAVEL APPROVAL (To be completed prior to travel)

Name 1	CSU ID Number 2	Department Name 3
Destination 4	Purpose 5	Per Diem Rate $ 6
Estimated Expenses $ 7	Portion to be Paid by CSU $ 8	Dates of Travel From To 9
Requested Prepayment(s) 10	Common Carrier $ Registration $ 26 Lodging (students only) $	Approval 11 Date Approval Date

TRAVEL EXPENSES (To be completed after travel is completed)

Date	Time Depart/ Return	Travel Point	Transportation: Common Carrier	Transportation: Other: Amount	Transportation: Other: Explanation	Lodging	Meals	Miscellaneous: Amount	Miscellaneous: Explanation
13	14	15	16	17	18	19	20	21	22
		Totals	23	23	[redacted]	23	23	23	Total Expenses $ 24

Other Employees Traveling in Same Car/Other Comments 28	Total to be Paid by CSU	$ 25
	Less Prepayment(s)	$ 26
	Balance Due Employee	$ 27

Traveler's Certificate:
I certify that all statements made hereon are true, that all expenses are for official University business, and, if traveling by personal car, I carry auto liability insurance pursuant to ORC Section 4509.51.

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Signature Date

Account(s) to be Charged:

	Account	Fund	Org	Prog	Subclass	BY	Grant	
1)		12						$ 27
2)								$
3)								$

Approval 30 Date

Approval Date

Form Issued July 1, 1998

USE OF STUDENT INFORMATION

The use and/or publication of any and all manuscripts, clinical reports, case studies, and other materials that contain personally-identifiable student information, require the prior, written consent of the student. Such consent must be obtained from the student, in writing, by having the student complete and sign the attached Consent Form or by other written documentation which clearly states the extent of the consent granted and includes the student's signature. Consent can be obtained via email provided the student's email transmission can be authenticated.

A student's consent is not required if all personally-identifiable information has been redacted from the material.

To ensure compliance with this policy:

- For all accreditation or showcase purposes, the appropriate Department Chair will review the material(s) that contain personally-identifiable student information prior to publication and/or exhibition.

- For all other publications or exhibitions, the specific faculty member responsible will review the material(s) that contain personally-identifiable student information prior to publication and/or exhibition.

Fenn College of Engineering
Consent Form

I, ________________________________, a student and Cleveland State University, by my signature below, give my consent to the College of Engineering to publish or exhibit my ________________________________. I understand that the document identified above contains my name and/or other information which is personally-identifiable to me. I also give consent to the College of Engineering to publish or exhibit a manuscript, clinical report, case study, or other material that contains my name, likeness, and/or other information that is personally identifiable to me.

____ ________________________
Signature of Student Date