

Sponsored Projects A-Z

Handling Your Grant from Cradle to Grave

Presenters:

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Sponsored Projects

Administration Major Functions

- Proposal Approval
 - Award Negotiation
 - Account Set-up
 - Contract Review & Negotiation
 - Liaison with Counsel and Outside Agencies
-

FIRST STEPS

- Notify OVPR and Dean's Office of Timeline and Program Requirements- Supply PA, RFP or link to website
- Begin SPAF
- Discuss any special circumstances with College at this point

BUDGET RELATED ISSUES

- Do I need to use this funding to buyout a course?
- Will I be using Research Assistants and if so, will I need to request tuition remission?
- Will space be an issue?
- Will there be any required match or cost sharing?
- Will I need to request a reduced indirect cost rate?
- Will there be any subcontracts/Consultants?

DOCUMENTS NEEDED FOR SUBMISSION

- Signed SPAF
- Standard Agency/Foundation Forms

OVPR will review the Face page, budget and budget justification in conjunction with the SPAF.

Once approved, Dr. Soprano will sign off on the proposal and OVPR will submit.

We need at least 5 days to review submissions

Award Types

Grants

Cooperative Agreements

Contracts

Proposal is Funded

Process for Grants

Grant Process

- OVPR receives notice from Agency
- Check the terms and conditions against the SPAF for accuracy
- If everything is OK, OVPR forwards the NOGA, SPAF, Budget to Grant Accounting for a Center # assignment

Proposal is Funded

Process for Contracts

Often we find out we have the award well in advance of actually receiving a contract

The nature of some of the work makes it urgent that the work start before the contract is either received/fully executed(Advance Cost Center)

The risk is on the PI and the Dept and College.

Contract Is Received

- Process:
 - PI should review, especially SOW (Statement of Work)
 - OVPR reviews and highlights potential issue
 - Forwarded to University Counsel for final review
 - If there are problems, discussions with PI and/or agency begin

Contract is Received (con't)

- Once negotiations are complete, contract is forwarded to VP for Finance for signature
- Returned to OVPR who sends signed contract back to agency
- OVPR receives fully executed contract back from agency and forwards to PI and Grant Accounting (budget is input)

Post Award Issues

Subawards/Subcontracts

Financial Impact Statement

Subaward Agreement

Collaborative relationship with financial assistance to an eligible third party institution or organization to help carry out part of the research or program scope of work

Prime (recipient of original award) → subrecipient

The key elements of a subaward include:

- a subawardee is independently responsible for conducting a portion of the scope of work;
- the arrangement is collaborative, and
- the arrangement is generally time-intensive.
- standard “Flow downs” in these agreements are taken from the sponsor specific prime terms and conditions. (i.e. Subawardee has responsibility for adherence to applicable Federal program compliance requirements)

Subawards(continued)

- Relevant Paperwork is submitted at time of proposal submission
- (Budget, SOW, NICRA, Letter of Intent)
- Temple is awarded a grant
- OVPR will pull subawardee information from proposal and develop a subaward(contract)

Subawards(contracts)

- Subaward(contract) is forwarded to subawardee for review and signature
- Signed subaward is returned to Temple
- PI completes a FIS. This forms is attached to the subaward and forwarded to University Counsel

Subawards(contracts)

- University Counsel assigns a CC(PO) number to the subaward(contract)
- This number is forwarded to Purchasing, where a Purchase Order is issued
- The Purchase Order will be forwarded to the PI and the Subawardee.

Subawards(contracts)

- An encumbrance will be established on this cost center for the amount of the subaward Purchase Order.
 - NOTE: Master PO's will not appear as a “commitment” in FMS
- It is VERY important that this Purchase Order number be referenced on invoices for payment against this subaward.

Issues related to Subawards

- When Temple issues subcontracts we become the stewards of those funds
- The work done by the subcontractor ultimately affects the work done by the PI on his prime award
- Detailed Scope of Work is essential
- Invoices should be carefully scrutinized

Grant Accounting

by Jeanette Pastelak, Grant Accounting

Overview of Topics

Setup of Awards in Financial Management System
(FMS)

Signature Authorization/Approval of Financial
Transactions

Cash Management/Financial Reporting

Current Funding

- 112 million awarded in FY06
(not including financial aid)
Health Sciences Campus - 55 million
Main Campus - 57 million
Approximately 62% federal
- 900 active awards
- 150 clinical trials

Setup of Awards in the Financial Management System (FMS)

What is a Cost Center?

Unique nine digit number assigned to each source of funding

Comprised of three sections

XX – XXXX –XXX

- Funding source – positions 1 and 2
- Stewardship- positions 3 through 6
- Identifier positions 7 - 9

Funding Sources

24 Voluntary Health and Welfare Organizations

- 26 Industry
 - 27 Foundations
 - 29 Others
 - 30 U.S. Department of Education
 - 31 Federally funded sponsored agreements other than those using 30, 32, 33, 34, 36, or 39
 - 32 National Endowment for the Humanities
 - 33 National Science Foundation
 - 34 MOBIS agreements from any federal agency
 - 36 U.S. Department of Health and Human Services
 - 39 U.S. Department of Health and Human Services Program Projects, with multiple activities and/or principal investigators, that must be budgeted and accounted for separately
 - 40 Federal awards with a non-government pass-through entity as the primary recipient and the university as a subrecipient (see Subrecipient Monitoring Compliance)
- ## 42 Commonwealth of Pennsylvania including those with federal pass-through funding
- 43 City of Philadelphia and surrounding counties including those with federal pass-through funding
 - 44 Voluntary Health and Welfare Organizations
 - 46 Industry
 - 47 Foundations
 - 49 Other

Establishment of Cost Center

New Award

- Fully Executed Agreement/Award
 - OVPR sends SPAF, award and budget to Grant Accounting to request number

Establishment of Cost Center

New Award

- With Unexecuted Contract or Unsigned Award
 - Complete Advance Cost Center Request form
- <http://www.research.temple.edu/spa/spaforms.html>
- SPAF, Budget, and Proposal must be in OVPR office
 - OVPR will request cost center number from Grant Accounting

Establishment of Cost Center

Continuation Award

- Complete the memo requesting continuation status
- Must include “default” cost center (not another sponsored project) if agreement does not materialize

Continuation Memo

- Not expecting a continuation
- Expecting a continuation (requiring new number to be established)
- Expecting a continuation (not requiring a new number to be established)
- No cost extension

Grant Attribute Table

TEMPLE - EXTRA! Office Client

> GU GAT,800,276715101 ON GAT01

--- GRANT ATTRIBUTE MASTER ---

CORP ----->	800	GRANT CENTER >	276715101
AWARD TITLE ->	HOW TO SET UP A COST CENTER NUMBER		
AGENCY ID --->	TEMPLE UNIVERSITY		
PRIN INVEST ->	EINSTEIN, ALBERT A		
P/I SSN ----->		SPAF NUMBER ->	04050001__
ANALYST CODE >	B	DAYS DUE ---->	60
BEGIN DATE -->	01/01/2005	END DATE ---->	12/31/2005
LOCATION ---->	UX	GRANT/CONT -->	C
A21 FUNCTION >	RS	DOC NUMBER -->	3611-8598____
OH CALC CODE >	2	F & A RATE -->	50.0
CFDA CONF --->	Y	TRANSFER CTR >	_____
REPORT FREQ ->	A	PAY TRAN CODE>	__
LAST RPT DATE>	00/00/1900	ROE STATUS -->	-
AWARD AMOUNT >	104,031.61	FROE AMOUNT ->	.00
ACCOUNT PAT ->	2	CATEGORY PAT >	
C/S > _ INT > Y AUD > Y F/P > _		F/F > SUB > N/B > D/I >	
OLD CENTER -> _		(X = MILLENNIUM, M = MENU) ==>	-

0001I-ENTER UPDATE AND SUBCOMMAND
A205W-END OF LIST

0002I-OR DEPRESS ENTER TO SCROLL DATA
01/04/05 10:06:46 1 M3LL FMS

4B :00.1 20/39

Connected CAP NUM 11:17 AM

start 2 Internet Ex... EXTRA! Person... CONTRACTS PR... grant acct upgr... Microsoft Power... 11:17 AM

Why Set Up A Cost Center Number if Award Has Not Been Received?

- Contracts arrive after project period has begun
- Expenditures properly charged to correct center
- Salaries are charged correctly
- Less Cost Transfers

Establishment of a Cost Center Budget

- Grant Accounting is responsible for entering budget in FMS
- Department is responsible for submission of correct budget
- Account Codes

http://www.temple.edu/controller/general_accounting/chart.htm#account

Cost Center Issues

- What does zero award amount mean?
- What is account 7900?
- Why don't I see an account code for my line item?
- Which account codes can I use?
- Can I spend if no budget is appearing?
- Can I spend if funds have not yet been received?

Cost Center Issues

- Translating budget into FMS account codes
- How did salaries get charged to the correct center number?
- Why am I still getting a cost center after my award has ended?

Cost Center with No Budget Information

RUN FRIDAY 05/06/05 AT 02:47:38
 CENTER NAME
 PA DEPT HEALTH
 STEWARD CENTER NO.
 0910 420910131

1031
 TEMPLE UNIVERSITY
 COST CENTER SUMMARY FOR GRANTS AND CONTRACTS
 FOR PERIOD ENDING 04/30/05

PACK A; COPY 1; COST CENTER REPRINT
 PAGE 1
 REPORT: GL214
 RUN DATE: 05/05/05

INVESTIGATOR: HAUSMAN, ALICE J.
 END DATE: 05/30/05

* * BUDGET * *	* * * ACTUAL * * *	* * * * *	* * * * *	* * * * *	* * * * *	* * * * *	* * * * *	
ANNUAL	AVAIL	ACCT	DESCRIPTION	CURRENT	YEAR TO DATE	COMMITTED	TOTAL ACTUAL & COMMITTED	AVAILABLE BALANCE
		6302	GRAD/RESEARCH ASS	6,004.77	25,153.92		25,153.92	25,153.92-
		6520	TECHNICAL/PROFESS	4,333.33	27,333.31	17,199.99	44,533.30	44,533.30-
		6670	EMPLOYEE CONSULTA		16,800.00		16,800.00	16,800.00-
			SALARIES & WAGES	10,338.10	69,287.23	17,199.99	86,487.22	86,487.22-
		6990	FRINGE BENEFITS	2,263.85	14,308.22	6,363.99	20,672.21	20,672.21-
			FRINGE BENEFITS	2,263.85	14,308.22	6,363.99	20,672.21	20,672.21-
		7200	GENERAL SUPPLIES	51.79	148.79		148.79	148.79-
		7208	CLERICAL STORES		1,072.25		1,072.25	1,072.25-
			SUPPLIES	51.79	1,221.04		1,221.04	1,221.04-
		7500	TRAVEL		205.14		205.14	205.14-
			TRAVEL DOMESTIC		205.14		205.14	205.14-
		7372	ADVERTISING-RECRU	145.00	145.00		145.00	145.00-
		7432	COPY CENTER	50.00	200.00		200.00	200.00-
		7600	OTHER GENERAL EXP		306.50		306.50	306.50-
		7611	TUITION EXPENSE		13,438.50		13,438.50	13,438.50-
			OTHER 7XXX ACCTS	195.00	14,090.00		14,090.00	14,090.00-
		7623	O/H GIFTS & GRANT	1,284.88	8,567.33		8,567.33	8,567.33-
			INDIRECT COST	1,284.88	8,567.33		8,567.33	8,567.33-
			TOT DIRECT COST	12,848.74	99,111.63	23,563.98	122,675.61	122,675.61-
			TOT INDIRECT COST	1,284.88	8,567.33		8,567.33	8,567.33-
		420910131	TOTAL	14,133.62	107,678.96	23,563.98	131,242.94	131,242.94-

RUN FRIDAY 05/06/05 AT 02:47:38

880

PACK A; COPY 1; COST CENTER REPRINT

CENTER NAME
UNIV OF COLORADO (NSF)
STEWARD CENTER NO.
1818 401818141

TEMPLE UNIVERSITY
COST CENTER SUMMARY FOR GRANTS AND CONTRACTS
FOR PERIOD ENDING 04/30/05

PAGE 1
REPORT: GL214
RUN DATE: 05/05/05

INVESTIGATOR: MENNIS, JEREMY
END DATE: 09/30/05

* * BUDGET * *	* * * ACTUAL * * *							
ANNUAL	AVAIL	ACCT	DESCRIPTION	CURRENT	YEAR TO DATE	COMMITTED	TOTAL ACTUAL & COMMITTED	AVAILABLE BALANCE
7,556.00		6001	F/T FACULTY					7,556.00
7,556.00			SALARIES & WAGES					7,556.00
642.00		6990	FRINGE BENEFITS					642.00
642.00			FRINGE BENEFITS					642.00
2,970.00		7200	GENERAL SUPPLIES					2,970.00
2,970.00			SUPPLIES					2,970.00
16,305.00-		7900	YEAR END ADJUSTME					16,305.00-
16,305.00-			OTHER 7XXX ACCTS					16,305.00-
5,137.00		7623	O/H GIFTS & GRANT					5,137.00
5,137.00			INDIRECT COST					5,137.00
5,137.00-			TOT DIRECT COST					5,137.00-
5,137.00			TOT INDIRECT COST					5,137.00
		401818141	TOTAL					

RUN FRIDAY 05/06/05 AT 02:47:38
 CENTER NAME
 CFD RESEARCH CORP (NIH)
 STEWARD CENTER NO.
 2306 402305131

918
 TEMPLE UNIVERSITY
 COST CENTER SUMMARY FOR GRANTS AND CONTRACTS
 FOR PERIOD ENDING 04/30/05

PACK A; COPY 1; COST CENTER REPRINT
 PAGE 1
 REPORT: GL214
 RUN DATE: 05/05/05

INVESTIGATOR: KIANI, MOHAMMAD
 END DATE: 09/22/05

* * * BUDGET * *			* * * ACTUAL * * *				TOTAL ACTUAL & COMMITTED	AVAILABLE BALANCE
ANNUAL	AVAIL	ACCT	CURRENT	YEAR TO DATE	COMMITTED			
5,000.00		6001						5,000.00
7,658.00		6302						7,658.00
		6580		14,000.00			14,000.00	14,000.00-
-----				-----			-----	-----
12,658.00				14,000.00			14,000.00	1,342.00-
2,692.00		6990		3,360.00			3,360.00	668.00-
-----				-----			-----	-----
2,692.00				3,360.00			3,360.00	668.00-
659.00		7200						659.00
-----				-----			-----	-----
659.00								659.00
658.00		7500						658.00
-----				-----			-----	-----
658.00								658.00
8,333.00		7623		8,680.00			8,680.00	347.00-
-----				-----			-----	-----
8,333.00				8,680.00			8,680.00	347.00-
16,667.00				17,360.00			17,360.00	693.00-
8,333.00				8,680.00			8,680.00	347.00-
-----				-----			-----	-----
25,000.00		402305131		26,040.00			26,040.00	1,040.00-
=====				=====			=====	=====



Fringe Benefits

What are Fringe Benefit Rates?

- Negotiated Annually
- What is Included in the Rate?
- http://www.temple.edu/controller/general_accounting/chart.htm#account

Facilities and Administration Rates

How is F&A charged?

http://www.temple.edu/controller/grant_accounting/grantrates.htm

Signature Authorization/ Approval of Financial Transactions

Signature Authorization

Level 1

- Sponsored Projects (HSC)
- Grant and Contract Accounting/Cost Analysis and Compliance

Level 2 Personnel Transactions Only

- Business Managers
- Department Chairs

Level 3

- PIs
- Business Managers
- Other Authorized Individuals

Approvals Requiring Additional Level 1 Signature

Transactions greater than \$2,500

Tuition Remission

Personnel Actions

- Employee Requisition
- Request for Position Reevaluations
- Request for Salary Changes
- Request for Special Compensation

http://policies.temple.edu/getdoc.asp?policy_no=05.20.15

Personnel Approvals Not Requiring Additional Level 1 Signature

Transactions Do Require Level 2

- Hiring Decisions
- Terminations
- Approval of Leave Request

Cash Management

Financial Reporting

Cash Management

Draw Down of Federal Funds

Cost Reimbursable Awards

Advance Payments (i.e. AHA, Army)

Full Payment (i.e. Foundations)

Responsible for billing and insuring cash is received

Reporting

- Interim Billing
- Financial Reporting
(Interim and Final)
- Receivables

Closing Out An Award

- Project Period or Budget Period
- Work with Principal Investigator, Business Manager or designee to identify all costs of the project
- Submit timely and accurate financial report
- Follow up procedures

Hiring Process for Grant Sponsored Programs

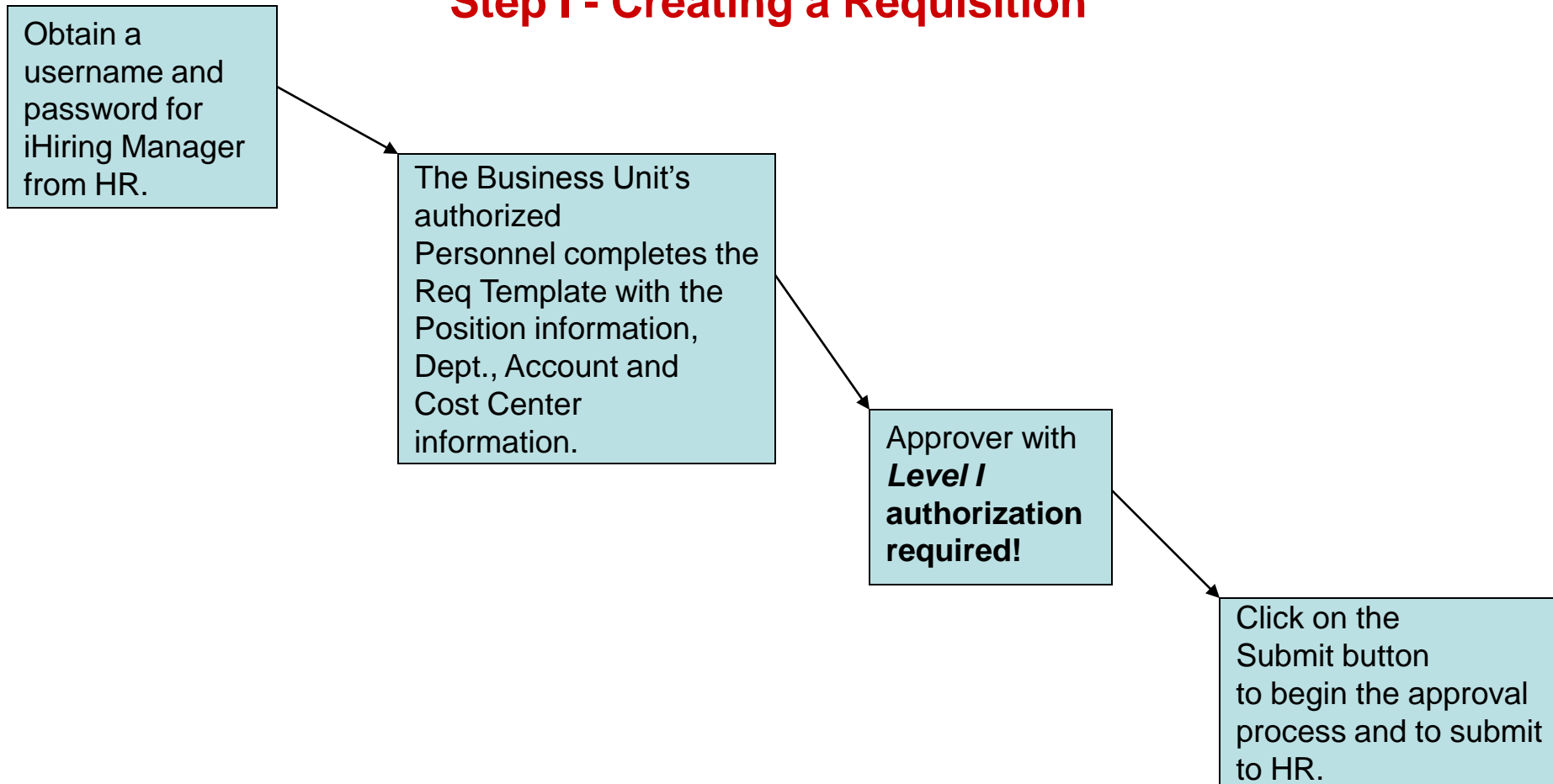
by

Lisa Stepp, Manager – Human Resources

and

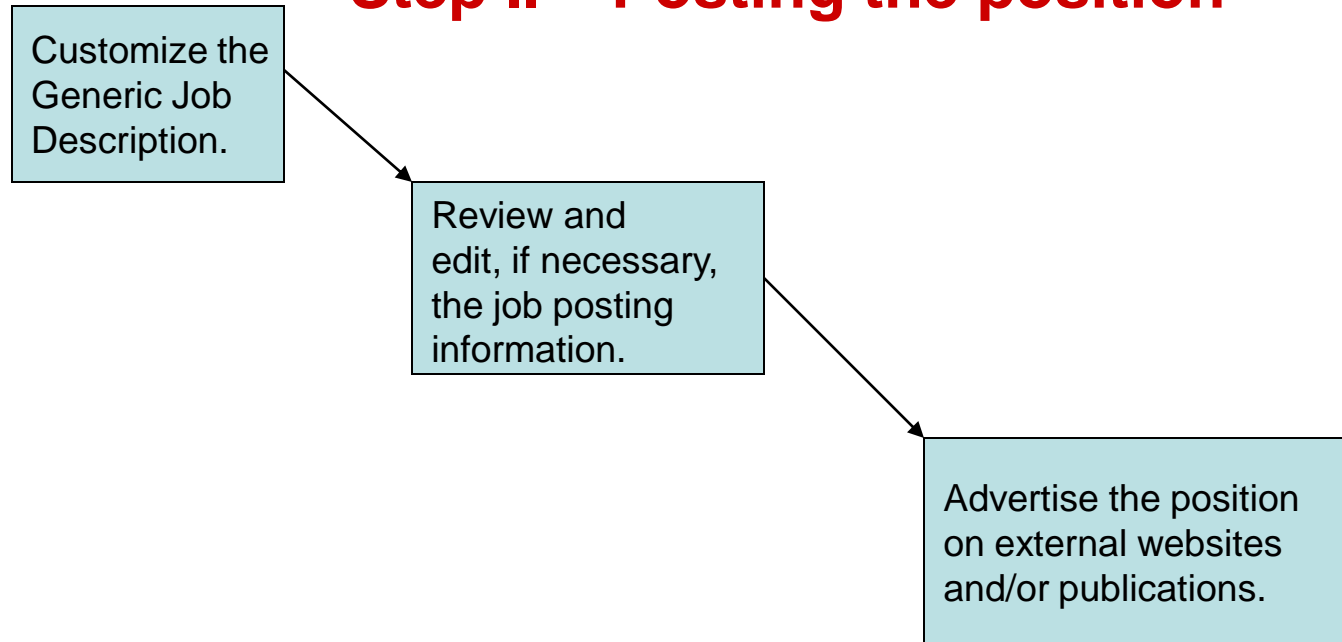
Sunaina Soares, HR Generalist

Starting the Recruitment Process Step I - Creating a Requisition



Starting the Recruitment Process

Step II – Posting the position



Starting the Recruitment Process

Step III – Interviewing Candidates

Review applications, *referred by HR*, on iHiring Manager.

Interview candidates either by phone or in-person. For in-person Interviews, obtain signatures from candidates. Keep your HR Generalist updated about the interview process.

Complete the Interview Evaluation forms, enter Comments in iHiring Manager and send to your HR Generalist.

Starting the Recruitment Process Step IV – Affirmative Action Form

Complete the Salary, Explanation of Selection, and Signature sections on the Affirmative Action Form sent by HR.

Forward the form to the required personnel for Level 1 or Level 2 signature authorization.

Send the form back to HR for final signature authorization. For positions that are T25 and below, final approval is from HR. For positions that are T26 and above, final approval is from Multicultural Affairs.

Starting the Recruitment Process

Step V – Reference Checks and other New Hire paperwork

Reference Check Forms to be completed by Hiring Manager using the standard reference check form provided by the HR Generalist.

Offer to candidate is extended by **HR only**. Offer Letter generated by HR. Copies sent to the candidate and the Hiring Manager.

Drug screening paperwork provided by HR to the candidate.

File close-out Paperwork and Reject Letters done by HR.

CONSULTANT

Independent Contractor

by -Theresa Cook, Accounts Payable

- **Who is an Independent Contractor?**

A general rule is that you, the payer, have the *right to control or direct only the result of the work* done by an independent contractor, and *not the means and methods of accomplishing the result.*

- Payment processed in Accounts Payable

- **Who is an Employee?**

A general rule is that anyone who performs services for you is your employee *if you can control what will be done and how it will be done.*

- Payment Processed in Payroll

Independent Contractor/ Contractual Agreements

Payments to Non-University personnel.

- Purchase order is required for payments with a CUMULATIVE total **OVER** \$2,000.
- Purchase Order is NOT required for payments of \$2,000 or under. These forms are submitted directly to Accounts Payable.

Independent Contractor/ Contractual Agreements

- Independent Contractor forms are located at:
<http://www.temple.edu/forms>
 - **Click on Accounts Payable**
- When requesting payment the following forms must be completed:
 - W-9, Contractual Agreement and an ICDC form is required
- Department must contact Payroll Management before contracting with Non-Resident Aliens.
- Description of services performed as well as additional supporting documentation. IE: invoices

CONSULTANT

Professional Services/Consulting Agreement

- Typically to organizations, not individuals
- Funneled through University Counsel
- Long term
- Large dollar amount

Honoraria

What is an Honoraria?

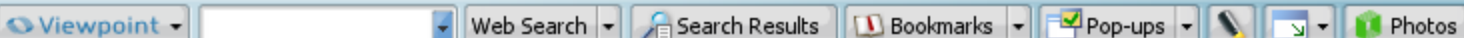
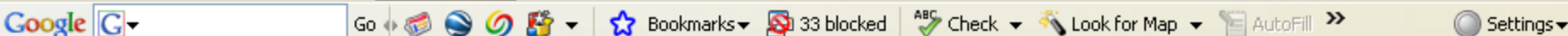
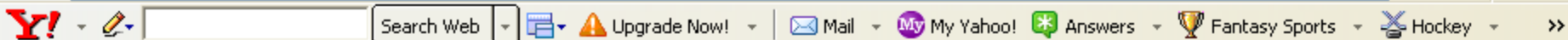
- An honorarium is a reward for voluntary services
- Reimbursement for expenses incurred
- No obligation for the payer to make payment
- How do I get an Honoraria paid?
 - Check Request
 - Supporting Documentation
 - W-9
 - No purchase order is needed

Visit the Accounts Payable Website at:

<http://www.temple.edu/controller/>

REVISITING “RECEIVERS”

- What is a receiver?
 - Needed when purchase order is over \$5000, regardless of invoice amount.
 - Validates services, receipt of goods
 - This will authorize payment to be made.
- Subcontract Payments
 - Approval is needed for every invoice regardless of the purchase order/invoice amount

Address <http://www.temple.edu/controller/> Go Links >>

FMS on the Web

Directories
FMS on the WebTreasurer's
ReportsAccounting
Departments

Grant Accounting

Cost Analysis and
Compliance

Travel

Accounts Payable

Purchasing

Controller's Home

Forms



Controller's Office

Quick Links

Go

Welcome to the Controller's Office

The Controller's Office is responsible for the development and implementation of University fiscal policies, accounting procedures, internal control mechanisms and financial systems. We prepare all official external financial reports and process all accounts payable transactions. We provide leadership and expertise as a university resource on financial information, business practices, and related regulatory issues.

- [Signature Authorization Policy](#)
- [Report2Web](#)

IMPORTANT NOTE - FMS is now available 7 days a week:
 Monday-Friday: 7 a.m. - 9 p.m. (7 a.m. - 7 p.m. on the 3rd working day of the month)
 Saturday: 9 a.m. - 8 p.m.
 Sunday: 1 p.m. - 9 p.m.



LOCATION

11th Fl. Wachman Hall
 1805 N. Broad Street
 Philadelphia, PA 19122
 (215) 204-7366

OFFICE HOURS

FMS ON THE WEB

- **What can I find on FMS on the Web?**
 - Commitments
 - Cost Center
 - Purchase Order Numbers
 - Grant Information
 - Invoices
 - Payment
 - And much more....
- **Who should I contact?**
 - Paul Amrhein 1-3125

DIRECT ONLINE ORDERING

by -Theresa Burt, Purchasing

Each College, School, Department has available to them direct online order access for the contracted commodities listed below.

- Office Supplies
- Printed Stationary: (Letterhead, Business Cards, Envelopes)
- Fisher Scientific

To apply for access, you must complete the Purchasing Online Ordering Profile Form found on the University's Employee Forms <http://webserv.adminsvc.temple.edu/employeeforms>

Purchasing (PCard) Visa Card Purchases

Non-repetitive, non-contractual transaction of **\$2000** (formerly \$1000) or less are to be made on a **Pcard**. Complete details related to Pcard processing can be found in the manual located on Purchasing's web page: www.temple.edu/purchasing

To apply for a card submit signed/authorized application all fields fully completed on the form:

- Transaction and Monthly Dollar limits are required
- Valid accounting information is required.

NOTE: Cardholder must notify Purchasing when changes are made to the grant or center numbers assigned to the card.

- Blocks restrict travel and other specified uses

Cardholders are responsible to for:

- Record keeping and verification of all items order
- PaymentNet (web based) transaction review process
- Report a lost or stolen card
- Contact Bank when you are notified of a decline before contracting Purchasing.

Electronic Workflow - Purchase Requisitioning

(became effective May 2006)

Required for Purchases > **\$2,000** (formerly \$1,000)

Most Departmental Secretaries/Administrators currently have access
License for access is required and can be obtained through Computer
Services. Application is on the workflow login page

<https://workflow.adminsvc.temple.edu/ultweb/Index.asp>

•Form completion:

- Department name
- Valid Accounting Information
- Delivery date
- Receiving person and address
- Name and phone number of requestor
- Item description and specifications
- Unit of measure
- Appropriate signatures

Requisition Processing

A feature called “incident status” is available in the workflow process for you to track the progress of your requisition as it is flows from the initiator through the approval process.

Once the approved requisition reaches Purchasing a buyer is assigned. The Buyer will then determine the appropriate bid process.

Bids are reviewed, evaluated and purchase order is assigned.

The requesting department will receive a copy of the purchase order.

The purchase order number must appear on all invoices submitted to the Accounts Payable department.

Purchase Order

Purchasing considers your request complete once the Purchase order is issued. It is then your responsibility to track the order including any changes needed for deduction or addition in costs or accounting information.

Any changes to the purchase order will require a new purchase requisition requesting a change order to the original purchase order.

Purchase order number must be referenced at all times once the order has processed.

Required changes may be but are not limited to the following:

Account number and/or Center/Grant number has changed

Quantity has increased or decreased

Open Commitment needs to be closed

Order needs to be cancelled

Accounts Payable requires a “receiver” (notice that the product or service being invoiced has been received) for orders in excess of \$5000.

Purchase order number must appear on all documentation including the invoice.

Types of Purchase Orders

Master Orders (MQ, MX, MB) are those against which departments may request materials or services directly from a supplier for repetitive purchases. These orders must be restricted to a specified period of time and an estimated dollar usage and list the names of those authorized to place orders and their per order dollar limits.

Contract Commitment (CC) Orders - University Counsel will assign a contract number to all agreements/contracts. Those contracts that commit budget monies will be assigned a "CC" number. That "CC" agreement number will become the contract purchase order number.

Independent Contractor (IC) Orders - Effective July 1, 2005 approved Independent contractor's in excess of \$1000 will be issued a purchase order for capturing of the commitment and for processing payment.

Further information is available on the Purchasing website www.temple.edu/purchasing

Questions for the Panel?