

Faculty/Staff/Student Frequently Asked Questions (FAQ)

Gift, Grant, or Contract?

Q: What is the difference between a gift, a grant and a contract?

A: A *gift* is a voluntary donation of money or assets given without expecting anything in return. Gifts are often provided to support a particular cause, program or project, but they can also be unrestricted, allowing the organization flexibility in how to use the funds. Employees should work with their [finance liaison](#) prior to seeking or receiving gifts.

A *grant* is financial support given for a specific project, purpose or area of work. Grants often come with a statement of work, which outlines the goals, timeline and activities that the receiving organization must follow to fulfill the terms of the grant. Grants are vital for funding specific initiatives, like research or program development. However, they come with specific expectations and reporting requirements. Employees should work with the [Research Office](#) prior to seeking or receiving grants.

A *contract* is a formal, legally binding agreement in which an organization agrees to complete specific work or deliverables outlined in a written document. In contrast to gifts or grants, contracts are strictly managed and have little to no flexibility. Employees are not authorized to sign contracts, including clickwraps (electronic agreements to site or vendor terms and agreements). Employees should work with their [finance liaison](#) for contract review and processing.

Q: Where can I find information on the contracts/agreements process?

A: The college contracts policy is on the Financial Services website, within the Resources for Faculty, Staff, and Students section, within the Purchasing resources.

Hosting an Event and/or Conference

Q: How does one proceed with an event or conference initiative? A: Employees should work with their [finance liaison](#) during the planning stage.

Independent Contractor or Employee?

Q: What is the difference between an Independent Contractor and an Employee?

A: Our university [Procurement Office](#) has crafted this checklist to assist the campus in determining if a person should be classified as an employee or an independent contractor and provided it on their website.

Mobile Communication Device (MCD) Allowance

Q. Can I receive a Mobile Communication Device (MCD) stipend?

A: No. The College of Humanities and Social Sciences only permits mobile device allowances for Development Office staff. Members of the Development Office should work with their supervisor to explore eligibility.

Office Maintenance

*Q: Is there a policy on faculty/staff **hanging items** on the wall?*

A: The university [Facilities Office](#) manages maintenance of campus spaces and the college works with that unit to maintain the aesthetics of our spaces. A [state regulation](#) provides specific guidelines for external signage on external spaces, and items mounted in common spaces (such as along highways) require university approval. Employees should work with their unit leader to discuss available options for their interior office spaces. Large or heavy items may require professional mounting by the campus carpentry shop, with installation costs billed to the unit requesting the service.

*Q: Is there a policy on faculty/staff **painting offices**?*

A: The university [Facilities Office](#) manages maintenance of campus spaces and the college works with that unit to maintain the aesthetics of our spaces. Offices are state property and should not be significantly altered without consultation with the Facilities Office. Employees should work with their unit leader to discuss available options.

Payments to International Visitors

Q: What is the process to make a payment to a Foreign National?

A: There are restrictions related to issuing payments to foreign nationals. Employees should work with their [finance liaison](#) during the planning stage.

Purchasing

*Q. What is an **eStore**?*

A. An eStore is an electronic market used to offer goods and services. An eStore may allow owners to more easily manage and grow events, conferences, and miscellaneous sales via the internet, by accepting credit card payments online. As a public institution, we cannot compete with the private sector in the pursuit of profits; there are many regulations related to how we offer goods and services. Employees should work with their unit leader to discuss ideas and plans.

*Q: How can **ETF funds** be used?*

A: These [funds can support](#) specialized instructional supplies and services, information technology, and other equipment and services that are important to maintaining the academic experience for our students, but are not covered by appropriated funds. These funds can also embrace emerging opportunities that differentiate the learning experience beyond what tuition provides.

*Q: Where can I find a list of **unallowable state-funded purchases**?*

A: A comprehensive list of unallowable purchases is not available. Refer to the [state spending guidelines](#), pages 5, 6, and 16. Employees should work with their [finance liaison](#) when considering making purchases as there are many nuances to state spending regulations.

*Q: Can I purchase **promotional items** on state funds?*

A: Possibly; explore our guidance on [Purchasing Promotional Items](#)

*Q: Why should I use **Marketplace** if other vendors outside Marketplace are less expensive?*

A: Although a specific item may be more expensive through Marketplace, Marketplace suppliers provide the university with significant pricing discounts across their product offerings. Additionally, due to the expedited payment process established for Marketplace, suppliers and the university experience reduced administrative costs related to order and payment processing. Therefore, it is a university policy that all [supply purchases below \\$2,500](#) are made via the Marketplace or paid for with a [PCard](#); reimbursement may not be permitted.

*Q: Will **June PCard purchases** be posted this fiscal year?*

A: When PCard purchases post to our system is determined by when the vendor transmits the charges. Therefore, June charges after the college closing date may be posted in this fiscal year or the next fiscal year. All receipts should be provided immediately as all transmitted charges must be reconciled immediately.

*Q: What is the policy on purchasing **software or computer equipment**?*

A: Employees should work with their [finance liaison](#) when considering making purchases and, if necessary, CHASS IT. Only approved software should be installed on university computers.

*Q: What is the process to purchase **Online, Historical or Used Goods**?*

A: Although the college has established [best practices](#) for purchasing online, historical, or used goods, employees should work with their [finance liaison](#) when considering making purchases.

Purchasing/Serving Alcoholic Beverages

As a state institution, the university has strict guidelines regarding serving and purchasing alcoholic beverages, which include requirements for additional levels of pre-approval. *SPECIAL NOTE: Alcohol cannot be purchased and stored prior to an event or after an event.* For events on NC State property, additional pre-approval requirements are: 1) Approval to serve alcohol, and 2) Approval to purchase alcohol, if any source of university funds are being used. For events outside of NC State property, additional pre-approval requirements are: 1) Approval to purchase alcohol, if any source of university funds are being used.

Q: What source of funds must be used for alcohol purchases?

A: Discretionary funds must be used. State-appropriated or Federal funds may not be used to purchase alcohol.

Q: When should the Request Permission to Serve Alcohol form be submitted?

A: The completed form should be [submitted to the Dean's Office](#) at least three weeks prior to the event, as the form requires signature from the Dean or Provost. Employees should work with their [finance liaison](#) when considering making purchases. Reference: [NC State Alcohol Regulation 04.20.01](#)

Q: When should the Request Permission to Purchase Alcohol form be submitted?

A: Pre-approval to purchase alcoholic beverages is a separate approval process for which you should use the *Authorization for Alcohol Purchase* form. The individual responsible for the event should be familiar with the

university's alcohol regulation and policy. The completed form should be submitted to the Dean's Office at least three weeks prior to the event, as the form requires signature from the Dean or Provost.

If you pay for alcohol as part of a meal (perhaps for a university guest) for which you did not gain prior approval, you may not be reimbursed for the expense. However, if extenuating circumstances prevented you from receiving approval prior to your purchase, you can attempt to get the Dean's approval prior to submitting receipts or reimbursement requests. Alcoholic beverages at meals or events, served as part of entertainment expenses, must be limited to meetings with university guests or other external individuals. Employees should work with their [finance liaison](#) when considering making purchases. Reference: [NC State Alcohol Regulation 04.20.01](#)

Scholarships

Q: Can I use state funds to provide a student scholarship?

A: Only legislatively approved and budgeted scholarship programs may be paid from state funds. (Spending Guidelines, page 20)

System Access Requests (SAR)

Q: How do I adjust the financial system features I can access?

A: Each department/unit has a financial services liaison who can assist with financial matters. Please work with your [unit's liaison](#) to assess your needs and facilitate any access adjustments.

Travel

*Q: Who qualifies for a **cash advance** for travel?*

A: Travel Advances issued from non-state funds, are available to permanent and temporary employees, visitors, and students when a university PCard cannot be used and one of the following conditions exists: • Trip exceeds 30 days; • Trip is for out-of-country travel; • A visitor, student, or volunteer whose documented travel needs exceed \$50; and/or Group / team travel. Please note: It is not general college practice to request a cash advance for non-employees. Travel advances are subject to all [University travel policies](#). The college has no responsibility for this process; the process is included in the [university travel manual](#).

*Q: What is the policy on **prepaying expenses for state-funded travel** that starts prior to June 30th but ends after June 30th, thereby involving two fiscal years?*

A: A traveler may pay for allowable travel expenses prior to the travel dates (prepaid expenses). There is no time constraint on prepaying travel expenses **except** when travel begins prior to June 30th and ends after June 30th, thereby crossing from one fiscal-year into another. If the **domestic** travel is crossing fiscal years, the travel must be completed by July 31st for expenses to be **prepaid**. If the **international** travel is crossing fiscal years, the travel must be completed by Aug 31st for expenses to be **prepaid**. The following chart may be helpful:

When is the Event Registration Due?	Domestic/Int'l/Both	Event Date	When can it be Paid?
Due current fiscal year, 06/30 or prior	Both	Any	Current Fiscal Year
Early Bird discount if paid by 06/30	Both	Any	Current Fiscal Year
Due next fiscal year, on or after 07/01	Domestic	07/01-07/31	Current Fiscal Year
Due next fiscal year, on or after 07/01	Domestic	08/01 and after	Next Fiscal Year
Due next fiscal year, on or after 07/01	Int'l	07/01-08/31	Current Fiscal Year
Due next fiscal year, on or after 07/01	Int'l	09/01 and after	Next Fiscal Year

Reimbursement of prepaid expenses may always be included on a Travel Reimbursement Request submitted after travel has been completed. Employees should work with their [finance liaison](#) when considering making purchases.

*Q: When should a **Travel Authorization** (TA) be submitted for travel?*

A: The TA should be submitted a minimum of 2 weeks in advance of travel. Reference the [university travel manual](#).

*Q: How far in advance can you **purchase airline tickets** for domestic or international travel?*

A: Airline tickets can be purchased with an approved Travel Authorization. The timing of the purchase is determined by the department approving the travel.

*Q: Can I **book a third-party location** before I make my request?*

A: No. You must wait until your Travel Authorization (TA) is approved before booking the property.

*Q. What if my **location is not available** when my Travel Authorization is approved and I am able to book? Can I enter another request?*

A. You may Edit the Third-Party Lodging request on your travel authorization (TA) by deleting that property and adding another property. You must still provide documentation for each property for review. You may Add Another Property at the time of your initial request to list multiple properties, but all must have supporting documentation.

*Q: If a traveler refuses to fly, **what are their choices?***

A: They can choose to drive. If they drive, they will need to rent a vehicle using the state term contract. If they do not rent a vehicle using the state term contract and the mileage is over 500 miles roundtrip, they would need a business justification for not renting along with department head approval. If they do not have a business justification or approval, the reimbursement would be capped at 500 miles roundtrip.

*Q: What is the preferred company we use for **calculating conversion rates** for international travel?*

A: [Oanda](#) is a frequently used currency conversion resource. Travelers should submit currency conversion documentation with their travel reimbursement request.