

## Welcome!

This newsletter is being published as an additional information resource for UTHSC team members with buying (purchasing & contracting) and paying (accounts payable) responsibilities. Our goal is to keep you informed about policy and procedure changes, new purchasing contracts, IRIS updates, and training opportunities and to provide helpful tips and other information relating to buying and paying at UT.

We welcome your feedback or suggestions for articles. Please send to Steve Rowland at [srowland@uthsc.edu](mailto:srowland@uthsc.edu).

## Non-Competitive Justification Reminder

If you are processing a requisition that needs a Non-Competitive Justification (NCJ), do not release the requisition until you have been notified by e-mail that the NCJ has been approved. Before releasing the requisition, type the NCJ number in the header text of the requisition. Questions? Contact Vic Crutchfield at 901-448-7271.

## IRIS Training Opportunities

Training classes are offered on various topics relating to the Purchasing, Accounts Payable, and Business Contracts functions in IRIS. Refer to the Training Calendar at [www.uthsc.edu/hrtraining/](http://www.uthsc.edu/hrtraining/) for specific courses and dates offered. Help with IRIS transactions and one-on-one training is also available by calling Purchasing Services at 901-448-5594, Accounts Payable at 901-448-5570, or Business Contracts at 901-448-2072.

## New Tax Exemption Certificate

UT received a new sales tax exemption certificate from the State of Tennessee effective July 1, 2011. The certificate is available on the UT Controller's website: <http://controller.tennessee.edu/> (click Tax link). To make University purchases of tangible personal property and taxable services free of Tennessee sales tax, a completed certificate should be provided when making purchases.

## Expense G/L Account Codes & Definitions

<http://controller.tennessee.edu/general/gldef.htm>

## New Assistant Director of Payroll/AP

Please join us in welcoming Linda Crouch as the Assistant Director of Payroll/Accounts Payable in Finance & Operations.



Linda has been with UT Health Science Center over 24 years and was most recently with the Department of Ophthalmology. You can contact Linda by phone at 901-448-4815 or by email at [lcrouch@uthsc.edu](mailto:lcrouch@uthsc.edu).

## Employee Discounts from Staples

Staples, UT's official source for office supplies, extends UT contract pricing to UT employees on purchases made from any Staples retail store in the 48 contiguous states or made through StaplesAdvantage.com. Staples will soon be opening stores in Memphis. Go to the following webpage for instructions on how to buy at retail Staples stores: <https://contractservices.staples.com/CustomerSetupExtWeb/pcardReg.faces?campaignId=2242>

For additional information and to register for on-line ordering, go to the following webpage: <http://linkregistration.stapleslink.com/c/s?RegFormId=104438> Please note that there is a \$50 minimum order for personal orders at StaplesAdvantage.com (no minimum for in-store purchases). For additional information, contact Debbie Spurgeon at [debbie.spurgeon@staples.com](mailto:debbie.spurgeon@staples.com).



## We are here to help.....

The staffs in Accounts Payable, Purchasing Services, and Business Contracts are available to provide assistance or answer questions for our associates on campus. Please don't hesitate to contact us if we can be of assistance.

### Vendor Requests with W-9 and Minority Status Forms

In accordance with IRS guidelines, effective November 2, 2011, all vendor requests must have the vendor's W-9/Minority Status form scanned and attached. The form can be found at:

[http://treasurer.tennessee.edu/forms/W9\\_Minority\\_Status.pdf](http://treasurer.tennessee.edu/forms/W9_Minority_Status.pdf). This form also includes a minority status information sheet that is needed to correctly create the vendor record. This document should be scanned and attached as well.

Instructions on how to request a vendor and attach the form can be found at:

<http://rwd.tennessee.edu/nav/financial/accounts%20payable/vendor%20request/index.htm>. The first item, ZXX1 – Create Vendor Request, gives you step by step instructions on creating the request. The last item, ZXX1 – Create Attachment for Vendor Request, is an online lesson on how to attach the W-9/Minority Status form.

### Contract Processing Tips

To help expedite processing of contracts through the Business Contracts office, please review the Prohibited Provisions and Most Common Errors on Contracts Quicklinks at: [www.uthsc.edu/finance/buscontracts/](http://www.uthsc.edu/finance/buscontracts/)

### Rental Car Contracts

UT has special contract rates with National Car Rental and Enterprise Rent-A-Car. See the Treasurer's Office travel webpage: <http://treasurer.tennessee.edu/travel> for details. These companies also offer UT's rates to employees for personal travel.

### Redesigned Ledger Available

A redesigned ledger for educational & general funds (those starting with E, I, N, or R) was recently made available in IRIS. This ledger, which can only be run for completed periods, generally has all the information found on current ledgers, but in a cleaner format. It also has several new features, such as itemized payroll information, sponsor payment information, email forwarding, and enhanced selection criteria. The new ledger is located on the IRIS menu at the following path:

IRIS Reporting >> Financial >> Funds Management >> ZFM\_UT\_LEDGER – University Ledger

### Moving Allowance Policy

In an effort to streamline the method for processing moving allowances and to ensure compliance with Internal Revenue Service guidelines, the University's moving allowance policy has been amended and went into effect September 1, 2011. The new policy no longer requires a written request and a T-27 to be submitted to the Treasurer's office. Instead all of the approvals and necessary information has been combined into a new form titled "Moving Expense Allowance Request T-5". This form is located with the new moving allowance policy on our website at [www.tennessee.edu/policy](http://www.tennessee.edu/policy). It is policy number FI0450 and titled Moving Allowance. Each campus and unit may prescribe additional procedures associated with this form and its approval.

In addition to streamlining the process, applicable federal taxes will be withheld from these moving allowances. The allowance will be reported as taxable income to the employee and applicable withholding taxes will be withheld from the payment. The new T-5 form will assist departments and employees in identifying the amount that will be withheld and the net amount that will be paid to the employee. Departments will be charged the matching amount for social security and Medicare taxes. This is required by the Internal Revenue Service. Employees may be eligible to recover the income tax withheld from their allowance by filing the appropriate IRS forms with their individual tax return. IRS publication 521 should be consulted for further information and this is also referenced in the new policy.

### New Surplus Pickup Form

The new Surplus Property Transaction Form is available at: [www.uthsc.edu/purchasing/surplus-pickup.php](http://www.uthsc.edu/purchasing/surplus-pickup.php). Do not use previous versions of the form. After completion, the form should be sent via campus mail to 822 Beale, Suite 162A or scanned and sent electronically to [surplus1@uthsc.edu](mailto:surplus1@uthsc.edu). Contact Jim Randolph at 901-448-2955 or 901-301-4779 for additional information.