The OK Corral is coming soon!
The OSU and A&M Systems’ e-Procurement solution, the OK Corral, will be here soon. The implementation team has been working diligently for the last several months to be ready for the pilot team to begin using the system on December 5, 2011. In February, 2012, everyone will begin using OK Corral for all of your purchasing needs. Stay tuned for more updates concerning training and features of the new system.

FINANCIAL INFORMATION MANAGEMENT

Tips for using the OSU Document Imaging System

The document imaging system can be accessed via this link: https://docimage.okstate.edu.

Once you are at the log in screen and you want to use the full text search, please remember to mark the box under the password “Request Full Text Search Support”.

For easy document retrieval, use the asterisk (*) as a wildcard. For example: if you are looking for a 5 digit file that starts with the numbers 13, type in 13*. This will bring up all files that start with 13. Or if you are looking for a long report name like Oklahoma State Regents Report, you can use *Regents Rep*. This will bring up all reports that have something before the word Regents Rep and something after it. You can have more than one index value with wildcards.

On the right side of index search there is a calendar icon for date indexes.

Range (Expression) Query – On the right side of index search use search range icon

Expression Syntax

<table>
<thead>
<tr>
<th>Expression</th>
<th>Symbol</th>
<th>Correct Syntax Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Between</td>
<td>[ , ]</td>
<td>['1', '2']</td>
</tr>
<tr>
<td>Greater than</td>
<td>&gt;</td>
<td>&gt;2222.00</td>
</tr>
<tr>
<td>Greater than or equal to</td>
<td>&gt;=</td>
<td>&gt;=2222.00</td>
</tr>
<tr>
<td>Less than</td>
<td>&lt;</td>
<td>&lt;2222.00</td>
</tr>
<tr>
<td>Less than or equal to</td>
<td>&lt;=</td>
<td>&lt;=2222.00</td>
</tr>
<tr>
<td>Not Equal to</td>
<td>&lt;&gt;</td>
<td>&lt;&gt;2222.00</td>
</tr>
</tbody>
</table>

If you have any questions regarding Imaging, please contact us at university.imaging@okstate.edu.

Fiscally Fit News from the Controller

September 2011

Associate Vice President & Controller - 207 Whitehurst, Stillwater, Oklahoma 74078 - (405) 744-4188
**BURSAR**

**Bursar News**

The first bursar billing statement email notifications for the Fall semester generated September 1 and included some new direct links to view billing statements and pay online.

In efforts to assist our students in meeting financial obligations, Oklahoma State University offers an in-house administered payment option plan (POP) as an alternative to the traditional lump-sum payment method. This plan provides an opportunity for families and students to pay University-billed expenses in regular monthly payments either by the semester or annually. No finance charges nor enrollment holds are associated with the payment option plan if payments are made as promised.

Visit our website link for the POP application: [http://bursar.okstate.edu/forms/osupop.pdf](http://bursar.okstate.edu/forms/osupop.pdf)

Also available online is the handbook describing bursar information. Check it out: [http://bursar.okstate.edu/forms/2010/Bursar_Catalog_2010.pdf](http://bursar.okstate.edu/forms/2010/Bursar_Catalog_2010.pdf)

**OSU Enrollment Policy**

Enrollment at Oklahoma State University incurs a financial obligation and responsibility of the student to pay all amounts owed in a timely manner. In order to remain in favorable financial standing with the University, and thereby continue to participate in its educational programs, services, and benefits, a student must meet all financial obligations incurred at the University on or before the due date. Any outstanding balance could delay registration for the spring semester. The first spring enrollment holds were placed September 16th and email notifications were sent.


Check enrollment holds by logging into SIS at [http://prodosu.okstate.edu/](http://prodosu.okstate.edu/).

Spring registration begins October 19, 2011.

**Bursar Optional Charge Monitoring Policy**

Optional charges are monitored closely to reduce the bad debt risk to the University, to reduce student/employee exposure to unmanageable bursar balances, and to help students maintain continuous enrollment at OSU by keeping bursar bills low enough to be paid off each semester per University policy.

Automatic holds are placed on accounts with past due balances and email notifications are sent. In order to reinstate charging privileges on campus, the account must be brought current. A message for individuals that should no longer be allowed to charge can be viewed on SIS screen 448 with reason code 0H “Charging Privileges Revoked – Current Term”.

A visit with our financial counselor located in 113 Student Union may re-instate charging privileges if there are extenuating circumstances, or documentation provided for scholarships or financial assistance that are not yet processed for the current semester.

The following is emailed to the bursar account holder:

**OPTIONAL CHARGING NOTIFICATION**

Oklahoma State University extends bursar optional charging privileges to students in order to facilitate use of campus based services. You have recently charged a substantial amount to your bursar account. In order to maintain charging privileges with the University, a payment to cover these charges must be received by our office within 5 business days or your charging privileges will be revoked.

Payments are accepted at 113 Student Union by cash, check, cashier’s check, or money order. Payments may also be mailed to P.O. Box 1583, Stillwater, OK 74076. For your convenience, credit card payments and electronic checks are accepted at [http://prodosu.okstate.edu/](http://prodosu.okstate.edu/).

If there are extenuating circumstances or you have documentation of scholarships or financial assistance for the current semester that have not been applied to your account, please contact our office to visit with a financial counselor by calling 405-744-6472 or visit our office in 113 Student Union.

This is the only notice you will receive pertaining to your charging privileges; therefore, not responding will result in you no longer being allowed to charge optional items/services to your bursar account.

**FISCAL & ADMINISTRATIVE COMPLIANCE**

**Reporting Fraudulent Activity**

ALL fraudulent financial activity or suspicion of fraudulent financial activity is to be reported directly to the Fiscal and Administrative Compliance section of the Office of the Associate Vice President & Controller or confidentially through EthicsPoint. A report can be filed through the EthicsPoint website or by calling toll-free 866-294-8692. The website can be found at: [https://secure.ethicspoint.com/domain/en/report_custom.asp?clientid=10933](https://secure.ethicspoint.com/domain/en/report_custom.asp?clientid=10933)

Associate Vice President & Controller - 207 Whitehurst, Stillwater, Oklahoma 74078 - (405) 744-4188
**RISK & PROPERTY MANAGEMENT**

**Property Damage and Inventory Records**

During the last fiscal year numerous OSU buildings received damage due to a variety of reasons. Contributing factors were record low temperatures, ice, straight-line winds, tornados, lightning, inadequate maintenance, construction design/practices, and human error. Some of these were preventable; some were not. Damage in some cases was negligible because of fire sprinklers and quick response from emergency responders. In other cases complete buildings were lost.

Fortunately, no severe personal injuries were reported but in most cases equipment and supply damage was reported. Insurance companies expect their clients to prepare a detailed list of equipment and supplies destroyed in an incident. One of the best methods of documenting the loss of equipment valued over $5,000 is the University Moveable Equipment Inventory. Each department should continually monitor movement of equipment and immediately report changes to OSU Budget & Asset Management.

There are numerous reasons why equipment moves from room to room and even building to building. With the amount of new construction, renovation, and sharing of equipment it is difficult to keep track. However, if these changes are not kept current on a daily basis, departments could find themselves uninsured for high dollar items such as an x-ray machine or an electron microscope. Replacement funds don’t typically exist in normal operating budgets. Unfortunately, it is almost impossible for OSU Risk Management to convince the insurance company to reimburse OSU for items not listed on a building inventory because premiums were paid based upon those listings. Please place a high priority on keeping departmental inventories accurate.

**What New Employees Need to Hear From You**

As you go over lists of job duties, office rules, and policies with your new employees, here are some important instructions that carry a lot of weight when spoken by a supervisor or department head.

“**Work safely**—if something is too high to reach, use the step stool or ladder; don’t stand on a chair or box. If you need to lift or move something that is too heavy, use the cart or ask one of us to help—we will gladly help you.”

“It’s important that you do your job correctly and in a timely manner, but don’t take shortcuts—it’s not worth it if you get injured in the process or you have to make corrections later on. If you are injured during working hours, tell me or your supervisor right away. Also let us know if you begin to notice any aches or pains while doing your work. We want you to be safe. Let someone know if you feel anything is unsafe.”

“You have the right to know the hazards of any substances you either work with or may come into contact with while you are on the job. Our department has Material Safety Data Sheets (MSDS) for all of our hazardous products and you can find them right here. We will give you more training on how to read and understand this information tomorrow. Our entire department receives this training (called Hazard Communication) once each year.”

“Four times a year we will have safety training on a topic that is relevant to our jobs. Hazard Communication is often one of them. Your attendance at these training sessions is required.”

“If there is a fire alarm, we all leave the building and meet across the street at the east end of the parking lot. That’s our way of making sure no one gets left behind in a potentially dangerous situation. Also, if you happen to notice something on fire in the building and it hasn’t caused a fire alarm, go ahead and pull the alarm—it’s located in the hallway near the entrance.”

(For more information on job safety, hazard communication, quarterly safety training, fire alarms, and other topics.)

**PAYROLL**

**Online W-2**

Please share this information with all your employees.

Oklahoma State University is required by law to furnish a Form W-2 to any employee who has worked for OSU during any calendar year. The Form W-2 itemizes the employee’s taxable compensation and tax withholding amounts and is used to complete the employee’s individual tax returns. Other tax-related information, such as amounts contributed for dependent care, the taxable cost of group-term life insurance over $50,000, and elective deferrals, is also reported on the Form W-2.

Starting in calendar year 2008, OSU employees could elect to receive their Form W-2 online (no paper copy) through the Web for Employees portal. If an employee does not elect to receive the online version of the Form W-2, a paper Form W-2 will still be provided.

Employees interested in the online version of the W-2 can go to http://www.vpaf.okstate.edu/PayrollServices/Documents/FY11/Online_Form_W-2_Notification_3.doc for more information regarding the advantages of the online W-2 and how to sign up.

For additional questions, contact Payroll Services at 405-744-6372.
UNIVERSITY ACCOUNTING

Master Real Property Lease Program

The Master Real Property Lease Program (MRPL) permits University colleges and departments to finance the acquisition, construction, and/or renovation of real property including land and buildings. Refinancing of outstanding obligations for real property is also obtainable. The next MRPL is arranged to begin the approval process in November with funding expected to be available in late July or August, 2012. If interested in participating in the MRPL, please contact Michelle Tidwell, 405-744-5671, or Susan Rackley, 405-744-5886, as soon as possible for more details.

PURCHASING

Important Dates

Board Dates:
• Requisitions requiring Board of Regents approval (greater than $150,000) are due in Purchasing October 5, 2011, 5:00pm, for the October 28, 2011, Board Meeting.

Purchasing Seminars:
• Policies and Procedures and Procedures, October 4, 2011, 10:00-12:00 AM, 106B Whitehurst
• Ethics in Purchasing, October 19, 2011, 9:00-11:00 AM, 106B Whitehurst

You may register for either of these sessions by calling Human Resources at 405-744-5374, on the Human Resources web site at http://hr.okstate.edu/hr/training/training.php, or by Email: osu-trng@okstate.edu.

Purchasing can be contacted at:
Phone: 405-744-5984
Fax: 405-744-5187
Email: purchase@okstate.edu
Website: www.purchasing.okstate.edu

GRANTS & CONTRACTS

HHS Conflict of Interest Rules Changes

The Department of Health and Human Services (HHS) has recently published rules for reporting financial conflicts of interest (FCOIs) for principal investigators (PI). The rules require institutions receiving Public Health Service (PHS) funding, including funding from the National Institutes of Health (NIH), to comply by August 24, 2012. One of the most significant changes is the lowering of the threshold for reporting significant financial interests (SFIs) from $10,000 to $5,000. The rules also require PI’s to disclose to their institutions all of their SFIs related to their institutional responsibilities. The 1995 rules defined “investigator” as the Principal Investigator and any other person who is responsible for the design, conduct, or reporting of research (or, in the case of PHS contracts, a research project) funded by PHS, or proposed for such funding.

Institutions will have to report information on FCOI and how they are being managed. FCOI dollar amounts can be reported as a range, rather than a specific dollar amount. Permissible ranges, as stated in the rules, are $0-4,999; $5,000-9,999; and $10,000-19,999. Increments of $20,000 may be used for amounts between $20,000 and $100,000, and $50,000 increments for those above $100,000.

Additionally, the new rules require institutions to make certain information concerning financial conflicts of interest involving key personnel public either via website or, in the case of a requestor, by a written response within five business days.

A list of changes can be found at:
http://grants.nih.gov/grants/policy/coi/

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Email: bursar@okstate.edu

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Fax: 405.744.7872
Website: www.fim.okstate.edu
Email: fim@okstate.edu

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405-744-8408 (PCard Administration)
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