



Faculty Guide

Presenting Arts Conferences, Institutes, Special Projects and Events

Document Table of Contents

* Frequently Asked Questions (Page 3-5)

I. Introduction (Page 6)

II. Proposal (Pages 6-7)

III. Planning (Pages 7-9)

IV. Execution (Pages 10-13)

V. Contracts (Page 13)

VI. Marketing and Promotion (Page 14-16)

VII. Financials (Pages 17-29)

Process Diagram (Page 17)

Payment of Expenses (Pages 18-19)

Cash Handling Policies (Page 19)

Hiring Process (Pages 19-25)

Background Checks (Page 20)

Independent Contractors (Pages 20-21)

Recurring Temporary Employee (Page 21)

USM Student Workers (Page 21)

USM Employees (Page 22)

PERS Employees (Page 22)

Retired USM Faculty/Staff/PERS Employees (Page 22-23)

Honoraria (Pages 23-24)

International Guests (Page 25)

Visa Issues (Page 25)

Collaborative Projects with Outside Organizations (Page 25)

Reimbursements (Pages 25-26)

Payments and Accounts: (Pages 27-28)

Setting up a DE Account (Page 27)

Agency Accounts (Pages 27-28)

Off-Campus Accounts (Page 29)

Payments to Individuals (Page 29)
Paying expenses from Grants (Page 29)

VIII. Participant Registration and CEUs (Page 30)

IX. Southern Miss Ticket Office (Page 31)

X. Reservation of Facilities (Page 32)

XI. Housing: On Campus and Off Campus (Page 33)

XII. Meals (Page 34)

XIII. Travel/Transportation (Pages 34-37)

 Permission to Travel (Page 34)

 Guest Travel Reimbursements (Page 35)

 Renting Vehicles or Vans (Page 36)

 Group Travel with Students (Pages 36-37)

XIV. Parking Management (Page 37)

XV. Use of USM Foundation (Pages 38-39)

XVI. Appendices (Pages 40-41)

FAQ's

1. Do I need approval to present an event, conference, camp, or other special project?

Yes, all projects need to be approved by the School Director. Depending on the size and scope of the project, it may be necessary to get approvals above the School level, i.e., the Dean, Provost, and even President. If it is a project for which a grant is being sought, there is an official process for approval provided by the [Office of Research Administration \(ORA\)](#).

2. What office can directly help me with my camp, institute, or program?

Conference Services, housed under the umbrella of Event and Conference Services, serves as liaison to several departments in order to coordinate some facilities and spaces across campus. It offers a variety of services to create a “One-Stop-Shop” experience. Services include: Facility scheduling, Dining/Catering, On Campus Housing, On campus recreation, and more. For assistance contact conferencerservices@usm.edu or call 601.266.5292.

3. Do I need to follow any guidelines when including participants under the age of 18?

If your camp/program will have minors (participants under the age of 18), you must follow The University of Southern Mississippi rules and guidelines as they pertain to this policy. [Minors on Campus Policy](#)

4. Who can execute a contract regarding my event?

All questions about contracts should be addressed to Mr. Steve Ballew, Director of the Department of Procurement and Contract Services at 601.266.4131. All contracts of any type must be approved and signed by an approved contract signature authority. Contract signature authorities include the President, Provost, Vice President for Finance & Administration (CFO), and the Director of Procurement. If a contract of any type is involved, this office must be notified in order for the contract to be executed.

5. Can I accept online payments for online participant registrations?

If the event is hosted at a facility managed by Event Services, they can provide support with the online payment gateway and logistics. Keep in mind that online payments are accepted for the final invoice balance through a University of Southern Mississippi service called CashNet. The University charges a percentage fee for MasterCard/Visa usage, online payments, and auxiliary revenue collection. Please be advised that these fees may be in return charged to the organizer as well. If an administrative fee is applied to the final invoice, the fees are absorbed within that fee. If you are not using Event Services and want to accept credit cards as a form of payment. [Review the payment card procedures and complete the forms.](#)

6. What are the policies or procedures for offering CEU credits?

For CEU information contact Dr. Irene Dearman at the USM Regional Service Center at 601.266.6777. The Regional Service Center, in collaboration with [S-RESA](#), may offer registration services, presenters, planning, CEUs, and/or facilitation. The minimum number of hours for CEU credit is 5 hours, and that will earn 0.5 CEUs, 6 hours = 0.6 CEU, so on. When offering CEU credits for a workshop, do not count the maximum number of hours of the workshop, because emergencies may happen and the maximum may not be able to be met. The participants will need to sign in and out of every session. S-RESA will provide you a sign-in sheet for the sessions and an evaluation at the end. [CEU Request form](#).

7. Do I need to perform background checks for guest speakers, presenters and other individuals?

Background checks are not required for temporary guest speakers, presenters and other individuals who have no direct contact with program participants other than short term activities supervised by Program Staff and are not being paid through the Human Resources office. However, all Program Staff/Authorized Adults, whether paid, unpaid or affiliated with the University, are required to have a current background check on record with the University before being hired or allowed to engage with minors. According to the Minors on Campus Policy, these background checks must be completed every year. Background Checks are available through Human Resources and must be initiated by the hiring department. [Background Check Request Form](#) | [Background Check Information Sheet](#)

8. Who do I need to contact if I want to hire a non-us citizen/international guest to participate in my conference or event?

- The Office of International Student and Scholar Services: usm.edu/international-services
- The Office of the Controller: usm.edu/controller
- Human Resources (Only if they are being hired for pay): usm.edu/hr

9. Can I hire someone currently working in the PERS system to do temporary work?

Yes, it is possible to hire someone currently working in the PERS system to do temporary work without it affecting their PERS status. If the person is employed with a PERS agency full-time then payments made to them could be subject to PERS contributions from both the employee and employer. Hiring Forms needed: PAF and the PERS retiree form.

10. How do I hire a recurring temporary employee? If a person is going to work for you, and is not a current benefitted employee with the university, he or she can be hired as a temporary employee. For an individual to be considered Temporary Staff, they will have to work less than 20 hours a week and cannot be working anywhere else on campus. If the person is employed with a PERS agency payments made to them could be subject to PERS contributions from both the employee and employer. [Please refer to the temporary staff hiring process](#)

11. What if I have questions regarding tax implications?

Call tax compliance in the controller's office at 601.266.4084. You should contact the Tax Compliance Officer before any special event takes place to discuss any potential tax liability surrounding the forthcoming events and the required information to be submitted after the event (including the deadline for submission). Especially if you are fundraising, selling admission tickets, selling meals/drinks or any other tangible products and/or bringing in outside vendors to sell items, etc.

12. Can University Facilities be used for Private/Personal/Non-USM Projects?

If an individual faculty member wants to present an event on campus that is a personal/non-USM project, it must be approved through the Office of the School Director and the Office of the Dean.

13. Does the University have an official policy document regarding off-campus travel with students? No, but there are several travel forms, developed in conjunction with the Office of Compliance and Ethics, as a guide for travel, including: 1) [Travel Checklist](#): This covers general topics on policy related travel concerns as well as documentation to gather for any student related travel. 2) [Emergency Contact form](#): A suggested form to be used to document emergency contact information for those traveling on the trip including insurance information. 3) [Student Group Travel Release form](#): A suggested form to gather information on the student traveling including any known medical conditions or drug allergies as well as a liability release section.**14. Does USM offer any compliance seminars for those who travel with student groups?**

The Office of Leadership and Student Involvement in partnership with the Title IX Office and the Office of Compliance and Ethics hosts a Legal Issues Seminar for student organization advisors. Those who travel with student groups who might not be a organization advisor are welcome to attend. Please email LSI@usm.edu for additional information and dates on when the seminar will be held.

15. Have any questions regarding any of the processes?

Contact Sally Downey, email Sally.L.Downey@usm.edu or call 601.266.4886.

I. Introduction

From time to time all faculty members find themselves needing to invite a professional guest to campus, put on a one-day seminar, create a multi-day conference, or even something far more extensive. These are all things that can bring a great deal of attention to the faculty member, school, college, and university. There are also a lot of details involved with doing any of these things that can make any event, no matter how small, very complicated.

This document is meant to be a guide to help faculty members with various aspects of the process, inform them of the necessary steps in creating and presenting events, and help them find out where to find answers to their questions.

There are a variety of things that go into creating and producing any event that must be done in order to make that event a success. Sometimes one does not find out about some details until they are in the middle of the event, or worse, after the event is over.

Every aspect is important for making events a success, but of particular importance are the areas of hiring people (especially international guests), how to receive and account for revenue, and how to properly handle expenses, insurance, and safety.

This document will not contain all the answers, but hopefully you will find this a helpful resource for creating and presenting events.

II. Proposal

From Creation to Completion: How to Plan and Execute Events and Conferences

First comes the idea. Next comes the work. It is important to set a framework for the event. Think through all of the details, no matter how small. If the event is going to be successful, all the details must be thought through, including how you will accomplish various tasks and who is going to handle them.

Is There a Need for the Event?

In order for an event to be impactful, there must be a need for it. Ask yourself: Will it add value and be attractive to others? How will it add value? Just because someone feels that an event is important does not necessarily mean that others feel the same way. Therefore, it is important to establish the need for an event. An event worth doing must be able to make an impact on a particular group of people and result in a bonafide benefit for those individuals. It is helpful to discuss the event with

others who might feel a need for such an event and confirm that such an event is needed and will provide value.

Necessary Approvals

It is always necessary to get the proper approval from one's supervisor. In all cases a discussion with one's School Director is necessary. It is important to prepare a proposal that simply states:

1. The purpose of the project
2. The cost of the project
3. The identified and anticipated source(s) of funding for the project
4. The benefit to the program, school, and university

Depending on the size and scope of the project, it may be necessary to get approvals above the School level, i.e., the Dean, Provost, and even President. This is especially true if the project may have a large impact on the general public. It is important to keep the appropriate administrators informed about all phases of the project.

III. Planning

Three essential elements to successful event planning are: 1) Plan the event with ample lead time 2) accomplish all tasks in a timely manner and 3) Communication: Determine which offices need to be involved and what their various roles are and communicate regularly with them.

Whenever one is trying to create an event, no matter the scale, one of the first things that must be considered is the budget. Determining the cost for the event is vital, as it ensures that you have the resources to make it a success.

Here are 6 steps to help you get started with the planning process:

1. Determine a breakdown of all of your expenses
 - a. Develop a Budget Spreadsheet
 - b. Include all purchases and rentals necessary for your event
 - c. Learn Payment Procedures
 - d. Follow State Procurement Laws
2. Determining your possible sources of funding (on and off campus)
 - a. When you approach others for financial support you must prepare a succinct proposal that essentially says
 - i. What you want to do

- ii. Why you want to do it
 - iii. What it is going to cost
 - iv. How it is going to be paid for
 - v. And what you need from that person/office/organization/etc.
3. Determine your personnel needs
- a. On-campus personnel
 - i. Ways to compensate on-campus personnel (faculty and staff) for additional duties
 - b. Off-campus personnel
 - i. Hiring procedures and approvals
 - 1. Independent contractors
 - 2. Job Postings in Cornerstone
 - 3. Hiring people who are already in the PERS system
 - 4. Hiring International guests
 - a. Necessary Visas - Contact Tax Compliance and International Services
4. Identify Your Audience
- a. Who are you trying to attract to the event?
 - b. By what method are you going to reach them?
 - i. Electronic media (television and radio)
 - ii. Digital Marketing
 - 1. Ads: Social Media
 - 2. Organic Posts on Social Media
 - iii. Print Media
 - iv. Direct Mail
 - 1. Mailing lists
 - vi. Personal visits and speaking engagements
5. Executing the Event
- a. Create an Event Logistical Outline with Planning Timelines
 - i. Every task has multiple parts
 - 1. Each task must be assigned to a person or an office
 - 2. Each task needs a deadline
 - b. Create a detailed schedule of events
 - c. Set regular meetings with the event staff
 - d. Communication is vitally important on every level, with participants, staff, and all offices that are involved. Many events fail because the director fails to communicate!

6. Post-Event

- a. No event is over until every bill has been paid and every piece of equipment is back in its place.
- b. No matter how much assistance one has with an event, the director of the event is ultimately responsible for making sure that everything has been done properly.
- c. Make sure that you communicate with all offices post-event to assure that they have everything that they need and any issues that arise have been resolved.

Working Within the University Framework

1. Project Approval

As mentioned above, no matter what project a faculty member wants to do, it needs to be approved by the appropriate administrator. If it is a project for which a grant is being sought, there is an official process for approval by the [Office of Research Administration](#) (ORA).

2. Informing other Offices about the Project

There are offices and/or specific people in each School, College, and the University who need to be made aware of events and projects. These offices and/or specific people can be invaluable if they know about the event/project and are kept in the loop as the planning and execution are carried out. They have knowledge of procedures and skills that faculty members do not. Too often such offices are uninformed until there is an emergency requiring them to drop what they are doing to resolve the issue. Lack of communication and coordination brings undue stress to uninformed offices making the outcome less positive than it could have been.

A sample of such offices and/or specific people are:

- College and/or School Budget Officer
- University Communications
- Controller's Office - Tax Compliance
- Business Services Office
- Office of Research Administration (ORA)
- Event Services
- Conference Services
- Physical Plant
- Parking Management
- iTech

IV. Execution

Here are some offices that can help and/or advise with the execution:

The Arts Institute of Miss (AIM), College of Arts & Sciences | usm.edu/arts | 601.266. 5922

The Arts Institute of Mississippi can help advise Arts faculty who want to host events, specifically in the areas of Marketing and Social Media, as well as the planning and logistics.

Event Services | usm.edu/event-services | 601.266.4399

If your event is primarily in: Thad Cochran Center, R. C. Cook University Union, Trent Lott National Center, Danforth Chapel, Outdoor spaces, work with Southern Miss Event Services.

Event and Conference Services | usm.edu/conference-services | 601.266.5292

If your event is NOT primarily in one of these facilities, including off-campus, work with Event and Conference Services Office.

Conference Services Office Procedures | usm.edu/conference-services

Conference Services is housed under the umbrella of Event and Conference Services. Conference Services serves as liaison to several departments in order to coordinate facilities and spaces across campus. It offers a variety of services to create a “One-Stop-Shop” experience. Services include:

- Facility scheduling
- Dining/Catering
- On Campus Housing
- On campus recreation

*Event and Conference Services also maintains a list of preferred hotels and vendors. This list can be provided upon request.

Event and Conference Services also provide marketing services through its Sales and Marketing team. Organizers can promote programs through Eagle Vision or select a package that fits their needs. As the Event and Conference Services office evolves, the desire is to provide clients/guests with additional services to enhance the experience as well as make the process easier for participants attending programs. Currently, there is not an online registration process.

The Process when working with Conference Services

Step 1: For events open to the public, if you are selling admission tickets, meals/drinks or any other tangible products and/or bringing in outside vendors to sell items, etc., please contact [tax compliance](#) in the planning stages to discuss the process to plan for any tax payments for the event.

Step 2: Contact Conference Services to inquire about a camp, conference, or program. You may email conferencerservices@usm.edu or call 601.266.5292.

Step 3: You will, in return, receive an application: “Application for Summer Camp/Program.” This document will request pertinent information needed for its team to get a general understanding of what you are requesting and how it can best serve you. Please provide as much information as possible including a draft or outline of a proposed schedule.

Step 4: Submit application. A representative will follow up about your application once it has been reviewed. Be prepared to provide more information if questions come up.

Step 5: After review of application, Conference Services will discuss the dates requested and provide pricing information. This is NOT a contract.

Step 6: Date and Pricing confirmation.

Step 7: Compliance Checklist. The University of Southern Mississippi has a strict Minors on Campus Policy. Please review this policy well in advance. If your camp/program will have minors (participants under the age of 18), you must follow the University of Southern Mississippi rules and guidelines as they pertain to this policy. Background checks are required!

Step 8: During the process and closer to event date, Conference Services will reach out to verify information such as participant numbers for housing or meals, etc.

Step 9: Hard numbers and guarantees for dining are due 10 days prior to camp start date.

Step 10: Check-In and Check-Out

Step 11: Payment Process- see below for details.

Budget Overview: Conference Services operates as a facilitator and incubator to serve a variety of on campus (internal) and off campus (external) customers. They are a true auxiliary unit and no funds generated are designated to the department in any way. The revenue collected from groups is primarily utilized to maintain conference operations (student staff wages, maintenance supplies for the summer, advertisement mailings, etc.) as well as used to distribute to the entities for which funds have been collected. For example, all revenue collected related to dining charges is paid to Eagle Dining to cover expenses billed to the Conference Services budget; Payne Center fees are distributed to Campus Recreation; etc. Interdepartmental invoices are distributed to the departments involved at the end of the conference season.

Common Expenditures: Common expenditures associated with the conference operation include, but are not limited to, housing, meals, facilities, and extra services. All groups (internal and external) are billed a one-time administrative fee* that covers expenses such as maintenance supplies, housekeeping, telephone and long distance charges, Wi-Fi and electronic usage charges, laundry (for linens), transfers out specific to camps and conferences, wages for conference assistants and miscellaneous physical plant charges. *Internal rates and external rates vary.

Billing: Billing for each camp and program will take place within two weeks at the conclusion of the event. Expenses such as housing and dining will be billed as quoted prior to camp. Payment should generally be processed no later than 30 days after the invoiced date. All payments from conference groups should be received no later than the agreed upon date. On campus departments may pay by interdepartmental invoice or check. Please indicate to Conference Services at the time of booking how the payment will be processed.

Interdepartmental Invoices (II): Payment by Interdepartmental Invoice is acceptable in most cases for on campus camp organizers. Since Conference Services staff manage most billing directly with conference constituents, it is the responsibility of the primary contact or camp organizer to provide prompt payment once the final invoice is received. Conference Services is billed directly by Eagle Dining and other departments so costs must be recuperated as soon as possible. All interdepartmental invoices should be submitted back to the Conference Services Office or to the Office of the Controller within 10 days after the event. Interdepartmental invoices related to a specific camp will be sent or billed to the organizer no later than two weeks after that event has concluded.

Checks can be made payable to The University of Southern Mississippi; attention: Conference Services. Please deliver directly to CS office in Union 229 or campus mail Box 5102.

Online Payments: Conference Services has limited online payment services. Online payments are accepted for the final invoice balance through a University of Southern Mississippi service called CashNet. The University charges a % fee for MasterCard/Visa usage, online payments, and auxiliary

revenue collection. Please be advised that these fees may be in return charged to the organizer as well. If an administrative fee is applied to the final invoice, the fees are absorbed within that fee.

Minors on Campus Policy

1. Please review the [Minors on Campus website and university policy](#).
2. It is extremely important to follow this policy when working with minors.
3. Contact Paul Walters, Director of Compliance, regarding training for working with minors on campus.
4. Please note the forms needed to comply with the minors on campus policy:
 - a. Annual Background Check
 - b. Acknowledgement Form
 - c. Volunteer Form, if applicable
5. Documented pick up/drop off procedure
 - a. Sign in/out sheet with a list of approved guardians

Ages	Day Camps (Non-residential)	Overnight Camps (Residential)
6 - 8	1:8	1:6 (<i>age 8 only</i>)
9 - 14	1:10	1:8
15 - 17	1:12	1:10

V. Contracts

All questions about contracts should be addressed to the [Department of Procurement and Contract Services](#). All contracts of any type must be approved and signed by the appropriate signature authority in the Office of Procurement. If a contract of any type is involved, this office must be notified in order for the contract to be reviewed and executed.

NOTE: Often performing artists may have a contract AND a rider (a list of things they require in order to perform, etc.). Ask if they have a rider. If so, get a copy and READ IT! Be aware that some requests may require additional preparation, funding, staffing, and might be something the university will not allow or cannot do. Be certain that the contract includes a rider and that all necessary preparations are made.

VI. Marketing and Promotions

It is recommended that this process begins the moment the event takes shape and is officially part of the approved school calendar, if possible, a minimum of 50 days prior to the start of event. Ensure that the contract has been approved by both parties prior to promoting the event.

1. Information - Gather complete and accurate information in a word document and a file of images BEFORE starting the process. Include:
 - a. WHAT: Title of event
 - i. Consider audience: to WHOM this is targeted?
 - ii. Is it self-explanatory? Does it need a tagline? Is that too long?
 - b. WHEN: Date(s) of event(s)
 - c. WHERE: CONFIRMED venue(s) or location(s)
 - d. WHO is involved: Performers, teachers, clinicians, etc.
 - e. WHAT: Description of event that explains WHO it is for? WHY it's happening?
WHAT makes it special?
 - f. IMAGES: HIGH RESOLUTION digital representative images, including art, presenters, generic advertising shots, any and all photos that will be needed should be put in a digital folder.
 - g. LOGOS: Sponsor logos, names, titles and specific verbiage that MUST be included.

Working with University Communications | usm.edu/university-communications

University Communications (UC) will work with you to create communications materials that are both professional and visually effective. Whether you require printed pieces or electronic materials, UC can help you complete your projects from concept development to product delivery.

Think ahead: Will you need printed pieces? What kind? Only images for electronic use? How will you promote the event? How will it be paid? Consider website banners, Facebook covers, social media squares, website imagery and logos.

1. Style Guide: The University Style Guide has been developed to assist communicators in developing materials that present a strong, consistent message about The University of Southern Mississippi and promote the institution in a positive and comprehensive way.

2. Approval: Communications materials representing the institution should be approved through University Communications and will be reviewed according to the guidelines presented in both the [Graphic Standards](#) and [Style Guide](#).

3. Approval from University Communications is required by Procurement Services in order to process payment for any printed materials, advertising or promotional items being paid for with university funds. If your communications materials require approval, email universitycommunications@usm.edu.

4. Promotions: All plans for external promotions must go through the school-level Marketing manager and then, through him or her, to the College of Arts and Sciences.

Arts PR/Marketing

1. Social Media

- Facebook: A Facebook event from the appropriate hosting organization should be set up with imagery designed as soon as it is available. The College and/or School should be tagged as a co-host. The event should then be shared to as many related pages as possible.
- Faculty, students and staff should be invited and encouraged to invite relevant friends to attend.
- If funds are available, the event may be sponsored to achieve more reach.
- Instagram: Instagram posts that feature event art and other relevant images are encouraged if the area has an Instagram account or art may be provided to college and/or school to share on their accounts. If an Instagram account is tied to Facebook, be judicious in posting repeated information.
- Social video: Simple to complex video is encouraged with quick interviews, images or other promotional media to promote the event. In general, these should be no longer than 30 seconds and, in rare cases, 1 minute.

2. Website development: The new university website is in development, so this area may face changes. However, all information prepared above should be sufficient to provide content for front-facing (public) webpages and calendars.

- Any registration links, links to social media, and event imagery SHOULD be found as part of this calendar link. It is unclear at this time if event pages will expand to include more detailed descriptions, bios, etc., though plans should be made to have a place to incorporate extended information and redundant links.

The actual development of a website may fall into the hands of talented faculty, staff or students or with assistance from the on-campus student design group, [Rise Creative](#). This should only be undertaken for events that will have a multi-year life, otherwise, a simple landing page with necessary information should be sufficient.

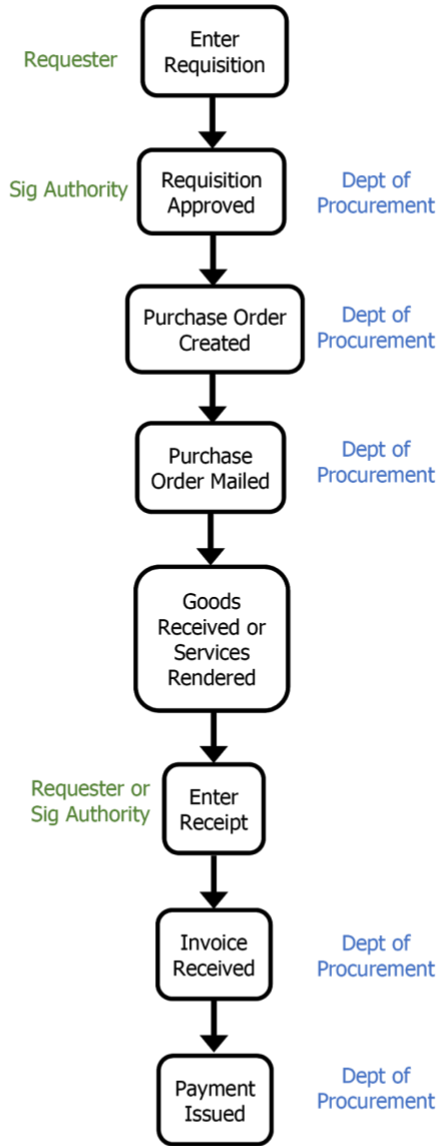
3. Public Advertising: All advertising is handled at the request of the School Director, Marketing Manager for the School to College of Arts and Sciences PR/Marketing. Major, front-facing events are the focus of external promotions with specific emphasis given to program promotions and recruiting-potential. These should be part of the annual calendar-planning process and include:

- Press release that will be circulated to local and relevant media
- Inclusion in the Arts Insider
- School/Area website header
- College website header
- LAB video monitors
- College/School Facebook header
- Social media posts to College (and School where applicable)
- Media advisories

VII. Financials

Process Diagram:

Purchase Order Process



Payment of Expenses (Before, During and After the Event): Overview for Beginners

Purchases from external vendors using University funds can be made with three different purchasing processes: 1) procurement card, 2) purchase order, or 3) remittance voucher.

When preparing to make a purchase, first determine which process is appropriate:

1. Can I use a procurement card? Is the purchase allowable and will the vendor accept it?
2. If you cannot use the procurement card, then a purchase order must be obtained BEFORE making the purchase.
3. Remittance vouchers should be used only when other payment methods are not more appropriate. Please contact Accounts Payable or visit the [Accounts Payable website](#) for more information about remittance vouchers and general payment policies.

Definitions to remember:

- Quote: a document from the vendor that specifies the pricing for specific goods or services. Quotes are required for certain purchases and above certain dollar amounts.
- Requisition: a request for a PO for the purchase of goods or services.
- Purchase Order (PO): the official approved order from the Department of Procurement & Contract Services for the purchase of goods or services.
- Invoice: a document from the vendor specifying the prices for the goods and services that have been received. Cannot include tax.
- Payment: the payment by Accounts Payable for goods and services after they have been received.

How Do You Make a Purchase?

- Procurement Card: can be used wherever VISA is accepted. The vendor accepting the Procurement Card cannot charge sales tax.
- Requisition/Purchase Order: must be approved by the Department of Procurement and Contract Services before purchasing.
- Remittance Voucher: used only for a few select purchases.

If using a Procurement card for paying expenses up front keep in mind that it CANNOT be used for the following:

- Purchases totaling more than \$5,000 (NO splitting to avoid the transaction limit) Equipment or inventory items (see listing on next page)
- Fuel
- Printing or novelty items with custom logos
- Back ordered items (items must be readily available at the time of order)

- Travel related expenses, including conference registration fees, the only exception is vehicle rental through the state contract agency (please see Travel website). You can pay conference registration fees with the procurement card. You need to have a signed PTT back from Travel before you pay for the registration fee and you will have to upload that signed PTT with the receipt when reconciling the transaction in SoarFIN. A better example might be individual airline tickets.

Cash Handling Policies and Procedures | [Cash Handling Policy](#)

Required Authorization to Collect Money: Departments must receive authorization from the Controller's Office before beginning a new cash handling operation. Once authorization has been received, the department should contact Business Services to demonstrate how activity will be accounted for and information on deposits being made.

- **Cash Handling Units:** Business Services is the central location for identifying and working with all cash handling units. Any department that receives cash payments is referred to as a cash handling unit. These departments are responsible for making their own deposits to Business Services (located on the first floor of Forrest County Hall). Each deposit should contain the required forms and information to correctly identify the funds being deposited. Business Services will, in return, coordinate daily bank deposits made via University police escort.
- **Segregation of Duties:** A separation of duties is required between the person receiving cash and the party responsible for accounting records (e.g. University General Ledger, department billing, and Accounts Receivable). Monthly reconciliation of cash receipts to the departmental budgets should be done by an independent party not involved in the cash handling or recording functions.

Hiring Processes

If you have a person that you want to hire for the conference or event there are a variety of ways to pay them depending on whether or not they are (a) independent contractors, (b) outside vendors, (c) in the PERS system, (d) USM faculty or staff, (e) retired faculty or staff, or other.

There are a variety of forms to use for this process depending on their category. Some are:

- Remittance Voucher
- Personal Service Agreement
- Professional Contract
- Personnel Action Form (PAF)

Background Checks

All Program Staff/Authorized Adults, whether paid or unpaid or affiliated with the University or not, are required to have a current background check (i.e. within the prior three years) on record with the University before being hired or allowed to engage with minors.

However, background checks are not required for temporary guest speakers, presenters and other individuals who have no direct contact with program participants other than short term activities supervised by Program Staff.

- [FAQ about Background Checks](#)
- [Background Check Form](#)

Independent contractors

Paying for Personal or Professional Services

An independent contractor's payment should be processed if you answer "yes" to one of these questions:

1. Is the service provider a business, LLC, C-Corporation or partnership?
2. Was the payment amount negotiated between the university and the individual?
3. Is there a written contractual agreement?
4. Are the individual's services recurring? (ex: weekly, biweekly, monthly, bimonthly. This does not apply to once a year.)
5. Did the individual set the price?

If you answered yes to one of five questions, then you are paying for some type of personal service contract.

Processing Payment:

1. Have the individual complete the following two forms (found on the Office of the Controller's website under Tax Compliance):
 - a. Federal Tax Form W-9 Instructions or a W-8 for International contractors
 - b. New Vendor – Vendor ID Request Form

Complete and attach the Independent Contractor Determination Form and attach the contract/PSA. In the case of International guests, this process should start much earlier as the paperwork is extensive and the tax implications vary from country to country. The tax liabilities can be as much

as 30% and this should be investigated early on to see if your guest and your budget will be impacted.

2. Submit to tax compliance for review and approval
3. Tax Compliance will submit the approved request to the next appropriate location for review and approval or processing
4. International guests will need to visit the office of ISSS.

Examples for paying an independent contract:

1. Individual working independently translating documents
2. Consultant drafting requirements for a specialized software system

Hiring a Recurring Temporary Employee

If a person is going to work for you, and is not a current benefitted employee with the university, he or she can be hired as a temporary employee. For an individual to be considered Temporary Staff, they will have to work less than 20 hours a week and cannot be working anywhere else on campus. If the person is employed with a PERS agency payments made to them could be subject to PERS contributions from both the employee and employer. [Please refer to the temporary staff hiring process.](#)

When hiring a temporary employee, make sure the following items are on file with HR:

1. Cleared background check
2. Up-to-date tax paperwork and a valid I-9
3. Personnel Action Form

Please note:

- If they will work for you throughout the fiscal year and they are hired for a one year period the job posting/approval process will not be necessary each time only for initial hiring.
- The employee (or proxy) will need to enter the time worked every two weeks, even if the pay period has “no hours worked.”
- Camp positions do not have to be posted in Cornerstone.

Examples of recurring temporary employees:

1. Accompanists (Frequency)
2. Technicians/Specialist
3. Extra musicians to be hired on occasion for more than one event in a fiscal year.

Hiring a USM Student

In order to hire someone as a student worker, they must be enrolled in at least 12 hours and not currently at their max amount of working hours with another department. Student workers are allowed to work up to 20 hours per week. [Please refer to the hiring student worker process.](#)

Hiring a USM employee

If you have an on-campus employee (i.e. benefitted staff or faculty member) to whom you are going to pay a fee to participate in an event, direct, teach, or perform, the form to use is a **PAF for Additional Payment**. [Please refer to the paying an employee for a second job process.](#)

Please note:

- If this “extra” work is during their regular scheduled work day they have to take personal leave time, so it is better for the employee if the “extra” work is done outside of normal work hours.
- Benefitted employees cannot work over 20 additional hours a week.

PERS Employees

It is possible to hire someone currently working in the PERS system to do temporary work without it affecting their PERS status. If the person is employed with a PERS agency full-time then payments made to them could be subject to PERS contributions from both the employee and employer.

Hiring Forms needed: PAF and the PERS retiree form.

Retired Faculty/Staff with PERS

In order to hire a person who is retired and receiving a monthly check from PERS, [please follow the hiring process for retirees.](#)

When hiring a retiree the department is responsible for paying the employer contributions to PERS at the current PERS rate. This must be paid as part of fringe benefits.

Paying an existing employee or student employee

In order to pay an existing employee or student employee, the task must be outside of their normal assigned job duties for their current position.

For Bi-weekly Employees:

Complete a PAF and be sure to include:

- a. An hourly rate of pay
- b. Estimated number of hours to complete the assignment
- c. Actual dates of the assignment
- d. Short description in the “Remarks” section describing the assignment

Once work is completed, enter the number of hours in the biweekly time system.

For Monthly Employees:

Complete a PAF and be sure to include:

- a. The total rate of pay for the assignment
- b. Actual dates of the assignment
- c. Short description in the “Remarks” section describing the assignment

**Outside People who are in the PERS System and currently working, and
Payments to State employees that are non-USM employees**

All payments must be processed through Human Resources. Have Hiring Questions?
Contact HR Partner for assistance - 601.266.4050

Honoraria

Honoraria are gratuitous payments given to professional persons for services for which fees are not legally or traditionally required and no invoice is presented for payment. Essentially, an honorarium is a form of gratitude shown toward an individual (non-USM employee) in return for that individual’s willingness to visit the University and participate in a University event of short duration.

The recipient understands that the honorarium does not represent compensation equal to what the recipient normally receives, nor should the intent be to cover all the costs associated with the individual’s participation in the University event. If the individual provides a service, it will generally not be considered an honorarium. An example would be a speaker that leads a workshop.

The reason for the honorarium, the name of the event, the date, and location must be referenced on a Remittance Voucher, as well as supporting documentation. An honorarium that exceeds \$600 must be reviewed and approved by the Director of Procurement. It is important for campus departments thinking of offering an honorarium to check with Procurement, or the Tax Compliance Office PRIOR to making such a promise in order to avoid having to rescind such an offer in the event an honorarium is found to be inappropriate for the given situation.

1. Honoraria should not be charged to restricted funds.
2. A signed original W-9 must be on file in Accounts Payable before payment is made.
3. A 1099-MISC is issued on all dollar amounts of \$600 or more. A permanent address must be provided for mailing of the 1099-MISC Form.
4. Original Documentation is required for all expenses being reimbursed, see Reimbursement to non-employees for travel expenses.
5. See the Tax Compliance website for more guidance and for issues dealing with nonresident aliens.
6. Forms Needed: Remittance Voucher and W9 (if not already on file) as located on the A/P Forms page.
7. Contact the Office of Research Administration should you have any questions.

Paying an Honorarium

An honorarium should be paid if you answer “no” to all of these questions:

1. Is the individual a business, corporation or partnership?
2. Was the payment amount negotiated between the university and the individual?
3. Is there a written contractual agreement?
4. Are the individual’s services recurring? (ex: weekly, biweekly, monthly, bimonthly. This does not apply to once a year.)
5. Is the individual an employee or student employee?
6. Did the individual set the price?

Processing Payment:

1. Have the individual complete the following two forms (found on the Department of Procurement & Contract Services website):
 - a. New Vendor – Vendor ID Request Form
 - b. Federal Tax Form W-9 Instructions
2. Complete a Remittance Voucher using account code 605122 “Honorariums”
3. Submit to Accounts Payable for processing

Example for paying an honorarium:

A guest artist/speaker participates in an event. However, the event would still happen with or without their participation. If the event is contingent upon their involvement, then please follow “Paying for Personal or Professional Services.”

Things to consider:

The amount given should be reasonable for the individual's expertise and experience, though we are not paying for that expertise or experience.

An honorarium is more of a “token of appreciation” or “thank you” and not a payment, nor does the individual expect any payment.

Any payments over \$600 is subject to taxation and the individual will receive a 1099 from USM.

International Guests

If you have a non-us citizen/international artist participating in your conference or event you MUST notify:

- [The Office of International Student and Scholar Services](#)
- [The Office of the Controller](#)
- [Human Resources](#) (Only if they are being hired for pay):

Visa Issues

There can be serious issues with trying to pay international guests. Check with these two offices far in advance (at least six months) to make sure that the person/people that you hire possess the correct type of visa. Some visas will not allow payment.

Collaborative Projects with Outside Organizations

Collaborative projects with outside organizations and individuals are welcome. If the event or conference is being produced by the University with an outside organization expenses can be paid by those outside organizations. In order to determine the appropriate ways to do this one must check with Steve Ballew in the Office of Procurement and Contract Services.

Reimbursements

Employee Reimbursement Voucher

All Purchases should be made on a Purchase Order or Procurement Card. If the Vendor will not accept a PO or Procurement Card as a payment option and the Employee must use personal funds, an Employee Reimbursement Voucher with the original itemized receipts must be submitted for reimbursement.

Please keep in mind that purchases for equipment, services, and state contract items must be paid from a purchase order. If an Employee Reimbursement Voucher is submitted for purchases of equipment or state contract items, the request will be denied and the form will be returned to the employee. Any items purchased by an employee that should have been processed on a PO will be returned by the employee or department requesting the reimbursement.

Once an Employee Reimbursement Voucher has been received, they are audited thoroughly for obvious errors and problems such as chartfield strings, signature approvals, original invoices, etc. Once an Employee Reimbursement Voucher has been audited and is deemed an allowable expense, it will be processed. One payer processes all the Remittance Vouchers and Employee Reimbursement Vouchers; allow at least two weeks for processing of Remittance Vouchers. Should there be extenuating circumstances that require the check to be issued sooner, reference the date needed in special instructions and hand deliver to the Accounts Payable Manager. Employees CANNOT approve their own reimbursements. Approval must be acquired from the next higher signature authority.

Forms: Employee Reimbursement Voucher as located on the A/P Forms page.

Note: A business related expense form must be completed for the purchase of any food, meals or entertainment related expense that a reimbursement is being requested for.

Reimbursement: Non-Employee

Reimbursements for Independent Contractors, Honorariums, Stipends, Athletic Umpires, Internationals individuals:

- All original documentation is required. When documentation is required for reimbursement it may include the following items:

Airline ticket documentation must be one of the following:

- The original passenger receipt that accompanies the hard copy of an E-Ticket or a ticket issued by a travel agency
- An e-mail or computer printout that reference the amount of the ticket, form of payment and that it is a non-refundable ticket - It will usually be called the Passenger Receipt and Itinerary page
- Copy of credit card statement reflecting payment:
 - Original itemized receipts
 - Copies of canceled check (front and back), or bank statements that provide details of paid checks
 - Credit card slips or statements
 - Consult A/P for questions on other forms of documentation that may be approved Form

Need: Remittance Voucher as located on the A/P Forms page

Payments and Accounts

Budget Officer will advise all Faculty members on how to properly use E&G Funds and DE Funds, as well as take checks or cash and deposit to offset expenditures from any events.

Set-up a Designated Fund budget (DE account)

Designated Funds are resources received by the University that have no limitations or stipulations placed on them by external agencies or donors but are internally restricted by the university for a specific purpose. [Click here to set-up a DE account.](#)

Agency Accounts

Purpose: An Agency Fund is a fund established by Controller's Office to record the administration of monies for which the University acts as fiscal agent and provides services to an outside principal. Agency funds are assigned within the 50XXX fund code. Moreover, these funds are not considered University monies or charitable contributions to the University.

A. Establishing an Agency Fund

1. Agency funds may be established for outside activities that support or enhance the mission of the University and where there is mutual benefit in the University acting as fiscal agent for the principal. The activities must directly or indirectly provide services or benefits to the University's programs or to its students, staff, or faculty.
2. All agency funds must have a UNIVERSITY sponsor who assumes responsibility for the proper administration of the agency fund on behalf of the principal and in conformity with University policies and federal, state, and local laws.
3. Examples of appropriate agency funds include a fund established for a professional journal when a UNIVERSITY faculty member is an editor of the journal, or for professional training, continuing education, or conferences offered by an outside professional organization and administered by UNIVERSITY, or employee, student, or alumni organizations or clubs sanctioned by the University. The University's responsibility to a principal under this policy is limited to acting as the principal's fiscal agent.
4. Fund establishment requires the following approvals on the [Request for Agency Fund Form](#).
 - a. The Principal (or authorized employee of the principal);
 - b. The UNIVERSITY sponsor;

- c. School Director/Dean;
- d. Tax Compliance Officer;
- e. Controller's Office

B. Agency Funds Services

Services provided by the University under the agency arrangement include the following:

1. Cash receipting through the Business Office;
2. Use of campus service departments at established rates;
3. Accounts payable;
4. Purchasing services;

C. Terms and Conditions of Agency Funds

1. Monies accepted for deposit in agency funds are not considered tax-deductible gifts to the University. Tax-deductible monies and or gifts are maintained by the USM Foundation. Prior to receiving gifts and tax-deductible donations, the Principal, the Sponsor, and or the Signatory must discuss with the USM Foundation's CFO regarding whether or not the transaction(s) should take place and how the anticipated transaction(s) should be handled.
2. Agency funds must have a positive cash balance at all times unless a necessary exception has been deemed appropriate surrounding the positive cash balance requirement. The Controller's Office and or the Procurement Office may enforce this provision by not processing a disbursement that will create or increase an overdraft.
3. Checks for deposit to the agency fund must be made payable to The University and deposited at the Business Office, in account 405500 "Agency Deposits" where 50XXX is the fund code assigned to the specific agency program code. The UNIVERSITY's expenditures account codes found on the University's chart of accounts should be used appropriately to track activity and record expenditures.
4. The Principal, the Sponsor, and or the Signatory must adhere to all applicable federal, state, and local laws. As such, special events and fundraisers held by the Principal may be subject to sales tax. The Principal Officers and or the Sponsor have an obligation to contact the UNIVERSITY's Tax Compliance Officer before the event takes place to discuss any potential tax liability surrounding the forthcoming special events and fundraisers and the required information to be submitted after the event (including the deadline for submission).
5. Signature Authorization Forms bearing the appropriate signatures of the sponsor and authorized signatory for the agency fund must be filed with the Controller's Office.
6. All disbursements require the appropriate purchasing authorization. The accounts payable department will issue University checks against the agency fund based on a documented Request Form or a vendor invoice that cites the agency fund number and bears the payment approval signature of the sponsor or signatory for the account.

Third Party Account On-Campus Agency Funds Benefits:

1. You get to use the USM Tax exempt status
2. Protection of the University

Proper use of Off-Campus Accounts

1. Student Organizations can have an off campus account, but the money can only be used for student activities, not educational purposes.
2. They must not use USM's tax ID number.
3. The money that is going into the account is not USM money.
4. Appropriate purposes for use of this money from an off-campus account are:
 - a. non-university activity
 - b. IMAGE has an Agency Fund - not an off campus checking account.
 - c.

Inappropriate uses for an off-campus account:

- a. Going on a university-sponsored trip
- b. Anything that is related to a USM sponsored/led USM activity

Payments to individuals:

- a. Guest Speakers: Honorarium payments through a Remittance Voucher if there is not an agreed upon fee. It will need to be paid through a Personal Services Agreement, if there is an agreed upon fee.
- b. Counselor/Advisor: PAF through Human Resources (these positions will need to be posted in Cornerstone)
- c. Teacher/Coordinator: PAF through Human Resources (these positions will need to be posted in Cornerstone)

Paying expenses from Grants

There are two set of guidelines:

1. You have to follow the university guidelines
2. You have to follow the granting agency guidelines

VIII. Participant Registration and CEUs

Online Registration/Online Payments - To allow online registration and payments:

- **Option 1:** If the event is hosted at a facility managed by Event Services, they can support with the online payment gateway and logistics. Keep in mind that online payments are accepted for the final invoice balance through a University of Southern Mississippi service called CashNet. The University charges a % fee for MasterCard/Visa usage, online payments, and auxiliary revenue collection. Please be advised that these fees may be in returned charged to the organizer as well. If an administrative fee is applied to the final invoice, the fees are absorbed within that fee.
- **Option 2:** If you are not using Event Services and want to accept credit cards as a form of payment, you must open a Merchant Account. [Review the Payment Card procedures policy and complete the form.](#)

Mail in: Create a mail-in check or purchase order form with all the details, including address, refund and cancellation policy. The mail-in should be sent to the Administrative Specialist supporting the Conference. Also, provide w-9 for those who wish to set-up USM as a vendor. Please refer to the [Cash Handling Policy](#).

In Person: Checks should be made payable to The University of Southern Mississippi (USM). All checks must be from a U.S. Bank in U.S. Dollars.

- No stale dated (older than 90 days) or future dated checks accepted.
- Check must be signed.
- Checks must be immediately restrictively endorsed with bank deposit stamp.
- Must include “For Deposit Only, The University of Southern Mississippi (USM)”
- Must be endorsed in the correct space located on the back side of the check.

Returned Check Procedures

- All returned checks will be returned to Business Services.
- Business Services will notify the originating department of the returned check and it will be the department’s responsibility to contact the payee listed on the check to collect funds along with the \$30 returned check fee.
- Business Services will notify the Controller’s Office to debit the original entry for the amount of the returned check. It is University policy to require restitution to be paid in the form of currency, money order, cashier’s check or certified check. Students who have had a returned check are not allowed to pay by check for the next calendar year.

Methods of Payment

Cash, Check, Credit Cards, Purchase Orders, etc.

For registration, cash, checks, credit cards, and purchase orders are accepted.

- If one needs to get USM set up as a vendor, provide a link to USM's w-9.
- Offices involved: Business services, Itech (to set-up CashNet), Purchasing (Purchase Orders)

CEU credits: If you have any questions contact Dr. Irene Dearman at the USM Regional Service Center at 601.266.6777. The Regional Service Center, in collaboration with [S-RESA](#), may offer registration services, presenters, planning, CEUs, and/or facilitation. The minimum number of hours for CEU credit is 5 hours, and that will earn 0.5 CEUs, 6 hours = 0.6 CEU, so on. When offering CEU credits for a workshop, do not count the maximum number of hours of the workshop, because emergencies may happen and the maximum may not be able to be met. The participants will need to sign in and out of every session. S-RESA will provide you a sign-in sheet for the sessions and an evaluation at the end. [CEU Request form](#).

IX. Southern Miss Ticket Office (SMTO) – The SMTO can help you set up events, create and sell tickets and manage sales on site. You may reach them to set up a meeting at 601.266.5418.

Before you go, be certain to have the following information:

- a. WHAT - Title of event
- b. WHEN – date(s) of event
- c. WHERE – CONFIRMED venue or location
- d. WHO – is involved performers, teachers, clinicians, etc.
- e. LOGOS –sponsor logos, names, titles and specific verbiage that **MUST** be included on ticket.

As you plan your budget, when you determine ticket price, you should also consider how to handle ticket office fees (pay them or pass on to customer) for ticket stock, personnel (if any), etc.

The Southern Miss Ticket Office can transfer ticket monies to the office organizing the conference via designated account.

X. Reservation of Facilities

For events in these facilities, visit usm.edu/music/facilities and fill out the appropriate reservation request. All information regarding seating, policies, etc. are included at the link as well as contact information.

- Facilities in the School of Music include: 1) Bennett Auditorium 2) Mannoni Performing Arts Center 3) Marsh Auditorium 4) Intermezzo @ Woods Gallery
- All other campus venues should be reserved through [event services](#).

Before you apply or meet with venue staff, be certain to have the following information:

- a. WHAT – What do you need from your facility? Chairs, tables, tech, catering, etc.
- b. WHEN – What date(s) of event – including load in and load out? Alternate dates if not available?
- c. BUDGET – What is your total max budget? Ask representative to be VERY specific on ALL costs to meet your needs or how things might be adapted to fit your budget.

NOTE: Often performing artists may have a contract AND a rider (a list of things they require to perform, etc.). In some instances you might have to ask for the rider. Be aware that some requests may require additional preparation, funding, staffing, and might be something the university will not allow or cannot do. Be certain that the contract includes a rider and that all necessary preparations are made as it affects facility needs.

Use of University Facilities for Private/Personal/Non-USM Projects

If an individual faculty member wants to present an event on campus that is a personal/non-USM project, it must be approved through the Office of the School Director and the Office of the Dean.

Example: If a student is paying to attend an event on the USM campus that is being directed/taught by a USM faculty member, it is assumed that the event is a university event. However, if it is an event that a student is attending, but the registration and funds are not going through the university, it is not considered to be a university event. Therefore, the faculty member in charge of the event could be held personally responsible for anything that could happen to a student while on campus (injury, sexual assault, etc.). Doing events in this manner is not a good idea because of this reason. Once again, if an individual faculty member wants to present an event on campus that is a personal/non-USM project, it must be approved by the Office of the School Director and the Office of the Dean.

XI. Housing

On-Campus: On-campus housing should be arranged with event services at usm.edu/event-services. Again, before you apply or meet with venue staff, be certain to have the following information:

- a. WHAT – What do you need from your facility? Will attendees bring their own linens and residency items?
- b. WHEN – What date(s) of event – including check in and check out? Alternate dates if not available?
- c. BUDGET – What is your total max budget? Who pays for this? How is it handled? Ask representative to be VERY specific on ALL costs to meet your needs or how things might be adapted to fit your budget.

Off-Campus: Off campus housing is possible in many of our local hotels. For the latest list of hotels and updated contact information, visit visithburg.org/stay. Before you apply or meet with hotel staff, be certain to have the following information:

- a. WHAT – What do you need from your facility?
- b. WHEN – What date(s) of event – including check in and check out? Alternate dates if not available?
- c. PAYMENTS – Be certain to discuss necessary paperwork to ensure timely payment. The hotel will need to be a vendor in the procurement system, quotes, purchase orders and other items may be necessary.

For conferences and conventions, the hotels might create a conference code to offer your attendees a special rate. Be certain to ask if any other amenities might be included in the package, early/late check in/out, breakfast, etc.

XII. Meals

Meals should be arranged with event services at usm.edu/event-services. If you ONLY have catering needs, you may visit [Southern Miss Catering](#). Remember, all catering on campus must be handled by Southern Miss Catering. There are some snack exceptions that may be found by in the [Institutional Policies](#).

Before you apply or meet with catering staff, be certain to have the following information:

- a. WHAT – What meals do you want provided? Breakfast? Lunch? Dinner? Snacks? Other?
- b. WHEN – What days and what times do you need food to be set up (ALLOW EXTRA TIME)? What time does it need to be removed (if necessary)?
- c. WHERE – Where does the catering need to be delivered and/or set up need to occur? Be VERY specific and be certain the facility can support needs that catering may not provide.
- d. MENU – Be certain to take into account special dietary needs. While budget may not allow much flexibility, a vegetarian option is standard. You may have to poll attendees for other special dietary needs. Also consider clinician or facilitator needs that may differ from attendees.

XIII. Transportation

All Travel must be processed through the Travel Department. There are a variety of transportation issues to deal with ranging from personal and guest reimbursements to policies regarding student travel. This is a very important section to read, especially when it comes to transporting students (USM as well as non-USM) for any reason.

To find answers to questions about transportation, [please refer to the travel policies and procedures](#).

[Do's and Don'ts of Student Transportation](#): The faculty or staff member in charge of the group should always complete a PTT and attach a list of the students attending the trip (Student Group Travel Workbook). The students should fill out the Student Group Travel Release Form. This is used in the event of an accident and should be kept with the person in charge of the group. It contains personal information, do not send it to travel.

[Permission to Travel](#): A Permission to Travel (PTT) is required sometimes by signature authorities for any trip their employee takes. Some use them as a method of keeping up with professional time. Travel requires them and additional information for specific purposes (identified by the purpose of

travel dropdown). All travel forms (Permission to Travel and Travel Reimbursements) must be sent to the Dean's Office for approval, prior to being submitted to the Travel Office.

[Guest travel reimbursements](#): Travel reimbursements for non-employees are handled through Accounts Payable.

Useful Travel Forms:

- [Employee forms](#)
- [Non-Employee forms](#)
- [Other Information and Forms](#)

At least two flight comparisons are required when an employee decides to fly, unless booking through a state contract travel agency. They need to prove they chose the lowest flight available for their route. The employee has the option of booking flights online if they can save money. If reservations are made over the internet or by other methods, a receipt and itinerary must accompany the request for reimbursement.

For all flights which are not booked through one of the contract travel agencies (Pro Travel, CH Travel), the state agency (USM) must maintain in its files a cost comparison showing a minimum of two (2) fares. This cost comparison must show the fare and any issuance cost and must show a savings, and shall be submitted along with the employee's Travel Voucher. Neither of these quotes should be through a travel agency if they will not be used. The least expensive routing shall be used. If the employee must book a flight at a price in excess of the lowest rate on the cost comparison, an e-Waiver request is required to justify using that fare and must be attached to the travel voucher.

Group airfare with undergraduate students (4 or more) can be arranged by PO using ProTravel to book the flights.

Travel advance can be obtained if the faculty or staff would like to cover all expense for the group. There are deadlines for requesting an advance so it would be done far in advance.

Graduate Students must comply with the same requirements as faculty and staff.

Renting Vehicles or Vans

Determine who will rent the vehicle for the trip. If the employee is a PCard holder the card may be used for the rental. If the employee is not the PCard holder then a personal credit card will be required for the rental. If the trip requires a Permission to Travel based upon the "Purpose of Travel" submit one to the travel office along with any required information in the required time frame. On the Permission to Travel, estimate the expenses for your trip. If your rental will be paid with the

Pcard, do not include the “rental amount” in your estimate. Submit the signed form three weeks prior to travel. A copy of the rental receipt if the rental was charged on the Pcard is needed to be reimbursed for fuel. Use a Travel Voucher for your rental car fuel reimbursement.

Useful Vehicle Rental links:

- [Quick Tips for Renting Vehicles](#)
- [All Vehicle Rental Information](#)
- [Van Rental](#)

Group Travel with Students

The university and its’ personnel have liability when it comes to group travel with students off campus. While the university does not have an official policy document on off-campus travel with students, several areas on campus can provide guidance when personnel are traveling with students.

The Office of Leadership and Student Involvement oversees the 200 or so active campus student organizations. They provide resources to organization leadership and their advisors each year. For advisor resources, [check out this link](#).

On the page, several travel forms are linked which were developed in conjunction with the Office of Compliance and Ethics as a guide for travel.

Travel Checklist: This covers general topics on policy related travel concerns as well as documentation to gather for any student related travel. [Travel Checklist](#)

Emergency Contact form: A suggested form to be used to document emergency contact information for those traveling on the trip including insurance information. [Emergency Contact Form](#)

Student Group Travel Release form: A suggested form to gather information on the student traveling including any known medical conditions or drug allergies as well as a liability release section. [Student Group Travel Release Form](#)

Annually, the Office of Leadership and Student Involvement in partnership with the Title IX Office and the Office of Compliance and Ethics hosts a Legal Issues Seminar for student organization advisors. Those who travel with student groups who might not be a organization advisor are welcome to attend. Please email LSI@usm.edu for additional information and dates on when the seminar will be held.

Contact Information for Related Travel Offices:

Travel Office | Jo Berry, Travel Coordinator, 601.266.4038

Office of Compliance and Ethics | Paul Walters, Director, 601.266.4346

Title IX Office | Dr. Becky Malley, Title IX Coordinator, 601.266.4466

Office of Leadership and Student Involvement | Emily Holmes, Director, 601.266.4403

Compiled by: Emily Holmes, Director, Leadership and Student Involvement

XIV. Parking | usm.edu/parking

All parking on campus, whether individual or group must be approved by the Office of Parking and Transit Services.

[Requests for Special Event Parking Request.](#)

Be aware that:

1. All guests (presenters and attendees) are required to have a permit to park on campus.
2. Passes do not work for parking meters, handicapped spaces, or service zones, as Violators will be ticketed and/or towed.
3. There is always a charge for any special parking requests.

XV. Use of the USM Foundation | usmfoundation.com/campuscommunity Process for Paying Expenses from the Foundation

Withdrawal Requests

The USM Foundation has specific policies governing the procedures and circumstances for which it will issue checks. Please ensure all withdrawal requests submitted to the Foundation comply with these policies and that the expense meets the purpose of the fund as detailed in the fund agreement. Foundation management reserves the right to return the withdrawal request for additional information or to reject any requested expenditure deemed inconsistent with the stated purpose of the fund. In addition, the Foundation has a Withdrawal Request Form to be used to request disbursements from Foundation funds. Please allow two weeks for checks to be processed. All Foundation Withdrawal Request forms should come to the Dean's Office for review and approval before submission to the USM Foundation.

When making payment from a USM Foundation Fund, please keep in mind that payments that are not in accordance with the specific purpose of the fund will not be made.

- **Supplies:** Purchases or reimbursements for supplies must include a detailed description of the supplies and how the supplies will be used to benefit the University. For example, if the supplies are to be used for research, please describe the research project for which the supplies will be used.
- **Guest Speakers/Artists:** Documentation required to process payments to guest speakers or artists includes either an invoice from the guest speaker or a signed Personal Services Contract listing the amount they have agreed to be paid along with the dates of the performance. Under no circumstance shall the department create an invoice for the vendor. Most guest lecturers and artists are new vendors to the Foundation, and thus, a W-9 Form will need to be completed and submitted with the Withdrawal Request.
- **Honorariums:** Documentation required to process payments for honorariums includes a flyer, program or email with details of the event and the W-9 Form.
- The USM Foundation is required to pay sales tax to the State of Mississippi on all purchases for which sales tax applies. If the Foundation makes a payment directly to a vendor, even if it is on behalf of the University, the payment must include Mississippi sales tax, if applicable. If sales tax is applicable but is not included on the invoice, you will be required to obtain a new invoice with sales tax. If the vendor does not have a Mississippi Sales Tax Identification Number, the Foundation is required to remit use tax to the State of Mississippi. Please note that the fund from which the payment is being made will be charged for the applicable use tax. If this occurs, you will be notified via email. The University is exempt from paying sales and use tax in the State of Mississippi. Tax-free purchases made through a University account may be reimbursed by the Foundation through normal withdrawal request procedures.

Funds may be transferred from the Foundation to reimburse departmental accounts at the University for expenses that have been incurred. The documentation required for the most common transfers is listed below.

- **Procurement card purchases:** Documentation required is the procurement card statement, copies of all invoices and receipts that were charged to the card and the Monthly Detail Report.
- **Reimbursement of Salary and Wages:** Documentation required to reimburse an account for salary, wages or fringe benefits paid during a recent prior payroll period is the Payroll Distribution Report.
 - If this was a payment made for additional services provided in excess of normal salaries and wages, please provide a copy of the University form submitted to initiate the payment to the individual along with the Payroll Distribution Report.
- **Reimbursement for Various Purchases:** Documentation required is a copy of the invoice/receipt and the Monthly Detail Report showing the purchase.
- **Reimbursement for Travel:** Documentation required is a copy of the Travel Voucher submitted to USM, copies of all receipts and the Monthly Detail Report showing the expenses.

XVI. Appendices

Quick Links to Offices That Can Be of Assistance:

The Arts Institute of Mississippi (AIM) Office- College of Arts & Sciences | usm.edu/arts

Business Services | usm.edu/business-services

Event and Conference Services | usm.edu/conference-services

Event Services | usm.edu/event-services

Office of Compliance and Ethics | usm.edu/compliance-ethics

Office of Human Resources | usm.edu/employment-hr | Contact HR Partner for assistance

Office of Leadership and Student Involvement | usm.edu/leadership-student-involvement

Parking Management | usm.edu/parking

Procurement and Contract Services | usm.edu/procurement-contract-services

Rise Creative | risecreative.co

Tax Compliance | usm.edu/controller

The Office of International Student and Scholar Services | usm.edu/international-services

Travel Office | usm.edu/procurement-contract-services/travel-policies-and-procedures

Title IX Office | usm.edu/sexual-misconduct/title-ix-usm

The Office of the Controller | usm.edu/controller

The Regional Service Center | S-RESA

University Communications | usm.edu/university-communications

USM Foundation | usmfoundation.com

Quick Links to Policies and/or Forms

[Agency Funds Policy](#)
[Background Check Form](#)
[FAQ - Background Checks](#)
[Cash Handling Policy](#)
[CEU Request form](#)
[Emergency Contact Form](#)
[Hiring student worker process](#)
[Hiring process for retirees](#)
[Minors on Campus Policy](#)
[Payment Card Procedures](#)
[PCard Vehicle Rental Policy](#)
[Paying an employee for a second job process](#)
[Procurement Forms](#)
[Request for Agency Fund Form](#)
[Set-up a DE account](#)
[Student Group Travel Release Form](#)
[Temporary staff hiring process](#)
[Travel Checklist](#)
[USM Foundation](#)
[Vehicle Rentals Info](#)
[Van Rental](#)

University Communications:

[Graphic Standards](#)
[Style Guide](#)