



**MIDWESTERN**  
STATE UNIVERSITY

# Account Managers Group

[mwsu.edu](http://mwsu.edu)



# Account Managers Group

**Welcome**

**Steve Shelley**

MIDWESTERN  
STATE UNIVERSITY

# PURCHASING



## WAREHOUSE RECEIVING & DELIVERY

- **How do items arrive at MSU?**
  - They arrive via local delivery, motor freight, or post office. Post Office will deliver to central receiving is between 2-3 PM daily.
  - Receiving personnel will process thru proper receiving policy. Once processed, end user will be notified via email/telephone that items have been received and are ready for pick up/delivery to you.
  - Let receiving personnel know how you want delivered.

# PURCHASING



- **How do items arrive at MSU? (*cont.*)**
  - If items delivered are computer/software in nature, Information Technology department will be notified of arrival and will be responsible for delivering to you, the end user.
    - NOTE: The IT department has to approve all computer/software items to be purchased. Please get your quote from them before sending a requisition to purchasing.



# PURCHASING



- **Who tags assets?**
  - Central receiving tags all assets.
    - High theft items that costs >\$500.
    - All equipment >\$5,000.

# PURCHASING



- **Question was asked about Copier/Printer expenditures being a big part of M&O budgets and pointers on how to save:**
  - MSU spends ~\$70,000 to \$80,000 per year on toner/ink cartridges.
  - Toner cartridge costs are built into the monthly payment of the copier and is not a part of the above \$'s.
  - The biggest expense to you is when you use the printer on your desk and have to buy toner/ink replacement. We suggest you use the copier for your printing needs instead of your desk printer.

# PURCHASING



## CENTRAL RECEIVING/WAREHOUSE HOURS OF OPERATION:

10 AM to 12 PM

1 PM to 3 PM

Contact Mr. Clint Loggins for  
receiving/warehouse questions.

Extension #4697

[clinton.loggins@mwsu.edu](mailto:clinton.loggins@mwsu.edu)

# Account Managers Group

## 2016 Budget Update

Valarie Maxwell

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# 2016 Budget Update

- Budget Presentations
- Budget work papers distributed
  - Reallocation of current budget
  - Spreadsheet for additional requests
  - Due back March 18th
- Student Service Fee budget presentations date - March 27<sup>th</sup>
- HEAF requests due May 1<sup>st</sup>
- Tuition and fee rates set at Board of Regents May meeting
- Staff compensation study complete May 31<sup>st</sup>
- Board of Regents approves at August meeting
- Legislative update

# Account Managers Group

Contractor (DPV) vs Employee (EPAF)

Valarie Maxwell

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# Contractor vs Employee



Why important?

- Can result in significant fines and penalties.

What determines this?

- 3 areas defined by the IRS:
  - Behavioral Control
  - Financial Control
  - Relationship

# Contractor vs Employee



IRS has a 20 point checklist to determine employee status.

- If the worker should be considered an employee, payments for services are done through an EPAF. (If he/she has never worked at MSU before or recently, the worker must first go to HR and Payroll.)
- If the worker should be considered a contractor, payments for services can be done with a DPV or Purchase Requisition. (Review DPV guidelines.)

\*If the employee is already an MSU employee, any payment for services must run through Payroll.

## Internal Revenue Service 20 point Checklist for Independent Contractor

Mistakenly classifying an employee as an independent contractor can result in significant fines and penalties. There are 20 factors used by the IRS to determine whether you have enough control over a worker to be an employer. Though these rules are intended only as a guide-the IRS says the importance of each factor depends on the individual circumstances-they should be helpful in determining whether you wield enough control to show an employer-employee relationship. If you answer "Yes" to all of the first four questions, you're probably dealing with an independent contractor; "Yes" to any of questions 5 through 20 means your worker is probably an employee.

- 1. Profit or loss.** Can the worker make a profit or suffer a loss as a result of the work, aside from the money earned from the project? (This should involve real economic risk-not just the risk of not getting paid.)
- 2. Investment.** Does the worker have an investment in the equipment and facilities used to do the work? (The greater the investment, the more likely independent contractor status.)
- 3. Works for more than one firm.** Does the person work for more than one company at a time? (This tends to indicate independent contractor status, but isn't conclusive since employees can also work for more than one employer.)
- 4. Services offered to the general public.** Does the worker offer services to the general public?
- 5. Instructions.** Do you have the right to give the worker instructions about when, where, and how to work? (This shows control over the worker.)

6. **Training.** Do you train the worker to do the job in a particular way? (Independent contractors are already trained.)

7. **Integration.** Are the worker's services so important to your business that they have become a necessary part of the business? (This may show that the worker is subject to your control.)

8. **Services rendered personally.** Must the worker provide the services personally, as opposed to delegating tasks to someone else? (This indicates that you are interested in the methods employed, and not just the results.)

9. **Hiring assistants.** Do you hire, supervise, and pay the worker's assistants? (Independent contractors hire and pay their own staff.)

10. **Continuing relationship.** Is there an ongoing relationship between the worker and yourself? (A relationship can be considered ongoing if services are performed frequently, but irregularly.)

11. **Work hours.** Do you set the worker's hours? (Independent contractors are masters of their own time.)

12. **Full-time work.** Must the worker spend all of his or her time on your job? (Independent contractors choose when and where they will work.)

13. **Work done on premises.** Must the individual work on your premises, or do you control the route or location where the work must be performed? (Answering no doesn't by itself mean independent contractor status.)



14. **Sequence.** Do you have the right to determine the order in which services are performed?  
(This shows control over the worker)

15. **Reports.** Must the worker give you reports accounting for his or her actions? (This may show lack of independence)

16. **Pay Schedules.** Do you pay the worker by hour, week, or month? (Independent contractors are generally paid by the job or commission, although by industry practice, some are paid by the hour.)

17. **Expenses.** Do you pay the worker's business or travel costs? (This tends to show control.)

18. **Tools and materials.** Do you provide the worker with equipment, tools, or materials?  
(Independent contractors generally supply the materials for the job and use their own tools and equipment.)

19. **Right to fire.** Can you fire the worker? (An independent contractor can't be fired without subjecting you to the risk of breach of contract lawsuit.)

20. **Worker's right to quit.** Can the worker quit at any time, without incurring liability? (An independent contractor has a legal obligation to complete the contract)

# Account Managers Group

International Student Employees

Web Time Entry Update

Kathy Rice

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# Hiring International Student Employees



- ❑ When a department would like to hire an international student, they should FIRST contact the International Services Office (ISO) to ensure employment eligibility.
  - ❑ With ISO approval, the [New Employee Instructions](#) form must be completed and issued to the student with direction to go first to the International Services Office and then the Human Resources Department/Payroll Department
  - ❑ The ISO will verify the student's credentials, issue an On-Campus Work Authorization form, and a Full-Time Enrollment Validation form.
  - ❑ Next, the student must go to the Human Resources Department to complete the Form I-9, required employment paperwork, and to obtain an Employment Verification letter.
  - ❑ The student must next go to Payroll to complete essential tax documents and elect a payroll method.
  - ❑ If the international student has not been issued a Social Security number, he/she will take both the letter issued from the ISO and HR to the Social Security office to apply for the Social Security number.
  - ❑ When the student receives the Social Security card in the mail (up to 2 weeks processing), he/she must bring the card to the Human Resources Department to complete employment processing. At this time an EPAF may be submitted by the department.
  - ❑ Hours worked prior to receipt of the Social Security card will be paid on the next available payroll cycle.
- Per federal regulations, international student employees may work up to 20 hours per week during the fall and spring semesters. With an exception request, international student employees may work up to 29 hours during the semester break and the summer *only*.
- [Student Employment Policy](#)
  - <http://www.mwsu.edu/humanresources/hiring-foreign>
  - <http://www.mwsu.edu/student-life/international/types-of-employment>
  - <http://www.mwsu.edu/student-life/international/social-security-information> .

# Time and Leave Reporting

Select the link under a date to enter hours or days. Select Next or Previous to navigate through the dates within the period.

**Time Sheet**

**Title and Number:** Payroll Assistant II -- CD0498-00  
**Department and Number:** Payroll Supervisor -- 3500  
**Time Sheet Period:** Feb 01, 2015 to Feb 28, 2015  
**Submit By Date:** Mar 04, 2015 by 05:00 PM

Earning	Shift	Default Hours or Units	Total Hours	Total Units	Sunday Feb 01, 2015	Monday Feb 02, 2015	Tuesday Feb 03, 2015	Wednesday Feb 04, 2015	Thursday Feb 05, 2015	Friday Feb 06, 2015	Saturday Feb 07, 2015
Regular Monthly	1	160	136		Enter Hours	8	8	8	0	8	Enter Hours
Federal Comp Earned	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
State Comp Earned	1	0	16		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Holiday Pay	1	0	16		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Sick Leave	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
FMLA	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Vacation Pay	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Campus Closed	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Birthday Leave	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Bereavement	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Jury Duty Pay	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Wellness Leave	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Leave - Other	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Federal Comp Used	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
State Comp Used	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Federal OT Paid	1	0	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
State OT Paid	1	0	0	0	Enter Units	Enter Units	Enter Units	Enter Units	Enter Units	Enter Units	Enter Units
<b>Total Hours:</b>			168		0	8	8	8	0	8	0
<b>Total Units:</b>				0	0	0	0	0	0	0	0

**Submitted for Approval By:**

# Account Managers Group

## Software Tips of the Month

### Excel



- Conditional Formatting
- Auto Fill
- Text Wrapping

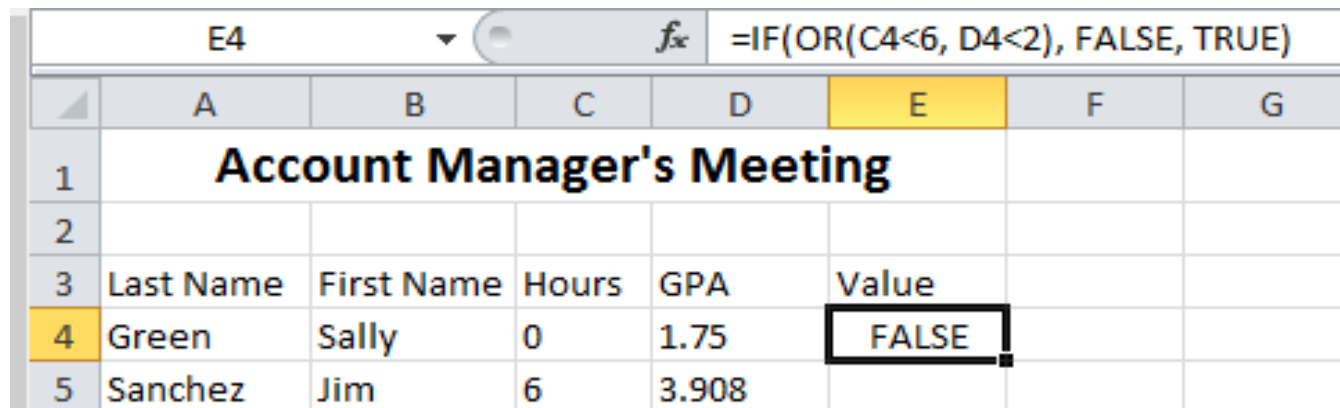
Terry Ortiz

# Formula

Example:

Alert me if my **Hours** column is less than six hours or if **GPA** column is less than 2.0 with a “false” value.

=if(or(C4<6, D4<2), false, true)



	A	B	C	D	E	F	G
1	<b>Account Manager's Meeting</b>						
2							
3	Last Name	First Name	Hours	GPA	Value		
4	Green	Sally	0	1.75	FALSE		
5	Sanchez	Jim	6	3.908			



# Account Managers Group

## Next meetings:



- ✓ April 30, 2015 – Dillard 189
- ✓ June 25, 2015 – Dillard 189

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Open For  
Questions and Answers



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Thank you!

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