**Resource Guide**

Department of Chemistry—UNC-Chapel Hill

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***Chemistry Intranet Site***

[*This site*](http://intranet.chem.unc.edu/) *is designed to be a guide to current procedures of the department and the university, and is also where you will find links for the forms and policies listed throughout this document. Please consult this site regularly.*

*Throughout the rest of this document “PA,” a PI’s Assistant, refers to the support person assigned to the Professor in whose lab you are conducting research. A list of PA’s and their support assignments can be found on our* [*intranet site*](mailto:http://intranet.chem.unc.edu/index.html%3Fdisplay=people_search%26content=support_assignments)*.***General Information**

The Chemistry Department’s administration include three general areas:

1. Human Resources

2. Laboratory Management/Technical Support

3. Administrative Support/Accounting/Sponsored Research

This document will address the specific responsibilities of each of these, but there are some general guidelines that should be followed when working with any of them.

• Keep the Department informed.

• Both the Human Resources division and the PA must always have your current home mailing address, home phone, lab phone and email.

• You must maintain your email address on at least one divisional listserv. The listserv is the primary means of contact used by laboratory management and safety personnel.

• Departmental staff is your first resource for answers.

• If you have a question, PLEASE direct it to the appropriate staff member. If you do not know whom the appropriate staff member may be, see the PA.

• Stay in contact with your staff members and respond promptly to their queries.

**Human Resources**

Human Resources Facilitator, HRF

Nancy Ray

Ke B232A

919-962-2174

nray@email.unc.edu

Student Services Payroll Coordinator, SSPC

Karen Gilliam

Ke B232B

919-843-3452

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The Student Services Payroll Coordinator, SSPC is the primary contact for payroll, insurance and fellowship concerns for new graduate students. The Human Resources Facilitator, HRF, is the primary contact for payroll, insurance and fellowship concerns for post doctorate fellows. New students must check in with the SSPC or HRF immediately to ensure that they are entered into the payroll system and can start receiving paychecks.

Both the Chemistry Human Resources (HRF/SSPC) and the PA must be informed of any fellowships that you are applying for. You must contact the PA early in the application process of any fellowship to ensure proper documentation is in place at the Office of Sponsored Research, and you must notify the PA and HRF/SSPC when a fellowship is awarded. Failure to follow this procedure will result in an inaccurate paycheck and in some cases suspension of health insurance and/or tuition not being paid.

Finally, the HRF/SSPC manages health insurance for those graduate students who request it. However, the ultimate origin of such a request is the graduate student. It is mandatory that all graduate students who want health insurance sign up for it on a yearly basis. The deadline for requesting health insurance is generally around the end of August.

**Laboratory Management and Technical Support**

**1 - Laboratory Safety**

[Best Practices Guide](http://imageserve.chem.unc.edu/resources/intranet/safety/Best_Safety_Practices.pps) is a list of UNC Chemistry Department Best Safety Practices, which has been compiled and approved by the Chemistry Department Faculty, C.A.S.H. and Department Safety Committee.

As was covered when you attended your grad student orientation in August, the University, the Chemistry Department, and your research advisor all want to make sure that you and others are able to carry out all of your research investigations with the highest regard to safety and with all necessary safety equipment and precautions in place.

• Always wear appropriate Personal Protective Equipment, PPE. For example, the appropriate PPE for handling chemical liquids in less than 1 L quantities, hazardous to skin, face, and eyes, are safety glasses with side shields, proper lab gloves, and lab coat. Do not wear PPE in common areas such as elevators, stairwells, corridors and conference rooms. Consult your PI’s Laboratory Safety Plan.

• Always use secondary container when moving chemicals

• Consult others for proper operation of all equipment that you are not familiar with.

• Check the literature and EH&S Laboratory Safety Manual for information regarding handling, reactivity, and disposal of all chemicals that you need to use.

• Use exhaust hoods with proper ventilation for handling of hazardous chemicals and all reactions. Use gas traps and other special precautions to limit the escape of noxious or smelly chemicals into the open air. When actively using hood, make sure it is operating at the proper face velocity, at the correct sash height as indicated by “at arrows,” and that alarms are on and functioning. Close hoods when not in use.

• Let your research colleagues know about the hazards of the chemicals with which you are working.

If you have a serious accident that requires medical attention, call 911 in addition to letting your PI know and follow the [Department’s Accident Reporting Procedure](http://intranet.chem.unc.edu/index.html?display=safety___emergency&content=safety___emergency). This procedure is also posted in Research Laboratories and the corridors of Caudill and Kenan Laboratories.

**2 - Laboratory Management Services - Building Maintenance & Repair**

Facilities and Planning Manager

Randy Simmons

Ke C040

336-266-0949

chemmaint@listserv.unc.edu

The Department’s Laboratory Management group, headed by Randy Simmons handles most of the normal laboratory and building maintenance, and many small renovation projects that may be required in your research space. In order to prevent duplicate work orders through the physical plant, please email non-emergency maintenance needs to chemmaint@listserv.unc.edu and emergency needs to [rlsimmon@email.unc.edu](mailto:rlsimmon@email.unc.edu).

If you have a small renovation project or installation that your PI has asked you to coordinate, please discuss with Randy so that he can assess the full scope of the request, and give you an estimate of timing and cost. For most research-related modifications, such as adding plumbing to accommodate a water-cooled laser or a water purifier, adding new electric service to run new instruments, etc. **This is very important; before you order a new instrument, make sure that there will be no compatibility issues.** Your PI’s research grant will be charged for materials and labor. There is no charge for routine maintenance and building repair items.

**3 - Building Access**

Per UNC policy, exterior door keys will no longer be issued. Access to exterior doors in Caudill Labs, Kenan Labs, Murray Hall, and Chapman Hall are controlled electronically. All exterior doors open at 7 AM and lock at 7 PM on non-holiday weekdays. At all other times, access is gained by swiping UNC ONECARDS at doors where readers have been attached. Please submit [Chemistry Department Research Labs ONECARD Access Form and Key Request](http://imageserve.chem.unc.edu/resources/intranet/policies_procedures/chemlabs_access_form.pdf) for exterior doors, Fisher Chemical Storeroom and other interior doors. There is a $5.00 per key deposit required for each interior door key issued to graduate students or post-doctoral fellows. Keys and door access will not be granted to undergraduate students. Payment must be made using your UNC ONECARD; cash, checks and other credit cards are not acceptable. The deposit will be refunded to your ONECARD upon returning the keys at time of graduation or leaving UNC. **Please return keys to Laboratory Management before you leave the Chemistry Department.**

**4 - Handling Assets and Equipment**

Although all office and laboratory furniture and equipment in the Chemistry Department is the property of the University of North Carolina – Chapel Hill and the State of North Carolina, the Chemistry Department is held responsible for accounting for each item. Therefore, for questions regarding assets and equipment, do not contact UNC Asset Management directly. Please follow the [on-line instructions](http://imageserve.chem.unc.edu/resources/intranet/policies_procedures/procedure_for_handling_assets.pdf) for appropriate handling of assets whether tagged by UNC-CH or not.

**5 - Telephone and Network Line Requests**

Requests for changes or additional lines are submitted electronically using the following electronic submission request. Telephone repair is requested by calling the Help desk at 962-HELP (919-962-4357). Use [this form](http://intranet.chem.unc.edu/forms/phone_request.html) for change or additional line requests only.

**6 - Service Center Facilities**

This University has numerous first class facilities to assist in your research.

|  |  |
| --- | --- |
| RESEARCH FACILITES | SUPPORTING FACILITIES |
| Chemistry Library | Electronics Facility |
| NMR Facility | Glass Shop |
| Mass Spectrometry Facility | Poster Board & Easel Loan (Dept. Only) |
| X-Ray Facility |  |
| Shared Core Facilities at UNC-CH |  |
| Department of Genetics Core Facilities |  |
|  |  |
| BIOMOLECULAR ANALYSIS FACILITES |  |
| Biomolecular NMR Analysis |  |
| Biomolecular X-Ray Analysis |  |

More information [here](http://www.chem.unc.edu/facilities/).

**7 - Housekeeping**

Email Randy Simmons at [chemmaint@listserv.unc.edu](mailto:chemmaint@unc.edu), with housekeeping issues or requests.

**Purchasing**

**1 – General Information**

One of the most frequent contacts between graduate students and the PAs will be in the area of purchasing lab supplies for research. There are 5 main types of purchases: E-commerce purchases, P-Card orders, Vouchers, Purchase Requests and purchases made in the Fisher Chemistry Storeroom.

The University is tax-exempt; the exemption number is 400028. A [copy of the tax-exempt letter](http://imageserve.chem.unc.edu/resources/intranet/policies_procedures/tax_exempt_letter.pdf) is available on the intranet site.

**Any purchase made with funds from a sponsored research project need to meet the criteria of allowable costs to be considered a research expense. Lab supplies can more easily be tied into a specific research project but it is not so easy with office supplies. If an office supply will be used only with that research project (such as a lab notebook to record research results) then the office supply can be charged to that specific research project and you can place the order. If the needed office supply is for general use in the lab then it must be purchased as follows:**

Email [chemsupplies@unc.edu](mailto:chemsupplies@unc.edu) and provide the following information

1) Staples catalog number

2) Quantity needed

3) Lab room number and PI’s name

4) What the item will be used for

5) A phone number to be called when the order is in.

Orders are placed to Staples each Thursday and are subject to department approval. Orders are generally delivered to the front office on Friday and you will receive a phone call to pick up your order.

Approved Staples Office Supplies, those that the Department will pay for, are listed [here](http://imageserve.chem.unc.edu/resources/intranet/policies_procedures/staples_inventory.pdf). If the item is not on this list you will need to be very specific as to why the item is needed and/or how it will be used.

A completed [Supply/Purchase/Repair](http://imageserve.chem.unc.edu/resources/intranet/policies_procedures/supply_purchase_and_repair_form.xlsx) form, must be submitted to the PA for Vouchers and Purchase Requests. Failure to supply accurate, complete information may delay acquisition of the requested item(s). The form can be electronically filled out and emailed to your PA or printed and turned in with appropriate supporting documentation. See your PA to determine what additional documents are needed

**Use the appropriate University purchasing system to purchase items for your laboratory. Personal reimbursements for lab purchases are reviewed on a case-by-case basis; they are considered exceptions and should rarely occur. If a university purchasing system is available for that item, the personal reimbursement will probably be denied. The procurement systems currently in place at the university are designed to meet your needs and the e-procurement system is expanding all the time to include more vendors. To request a reimbursement see your PA for details on how to obtain an exception.**

Another potential pitfall in the ordering process is providing the vendor with improper shipping and billing information. The street addresses for the 3 labs are:

Caudill Labs: 131 South Road

Kenan Labs: 125 South Road

New Venable and Murray Labs: 123 South Road

Be sure to include your PI’s name and room number for delivery

Our mailing address for billing purposes is:

Department of Chemistry

CB #3290

University of North Carolina

Chapel Hill, NC 27599-3290

Proper use of these addresses will ensure that you receive the order in a timely fashion and that invoice and billing information is properly routed to the PA for payment.

**Chartfields**

All purchases are funded (paid for) by the use of chartfields. Treat this number as you would your personal credit card number – enter carefully and accurately. Your PI and sometimes the Account Monitor will let you know what chartfield to use, and this will change over time. Generally you will be given a 7-digit Project ID, ex 50XXXXX or 51XXXXX. When you are asked for a full chartfield, you will need to include the Department number-318300 if the funds are administered by Chemistry otherwise the dept# used will be where the funds reside, the Source, the Fund, and the Account in addition to the Project ID And/Or Program Code & Cost Code .

EX) Fund XXXXX Source XXXXX Account XXXXXX Dept XXXXXX ProgramID# XXXXXX Program Code XXXX Cost Code XXXXXXXXXX

**2 - E-Procurement Purchases**

Another method of purchasing at UNC is via the University’s [e-procurement process](http://finance.unc.edu/procurement/purchasing-services/eprocurement/). This is the preferred method of purchasing. Currently the vendors available in this system are: Staples, Airgas/National Welders, Bio-Rad Science, Fisher Scientific, Life Technologies, PerkinElmer, Roche Scientific, Sigma-Aldrich, VWR International, Apple Computers, CDW-G, Dell, Lenova CCI, Grainger, MSC Industrial Supply, Fastenal, Graybar, Mayer Electric, DHL and Fed-Ex. Vendors are continually being added so check here often. Using these sites will use your PI’s funds wisely by taking advantage of educational discounts, special pricing and no tax. To use these sites, you must first register as a UNC affiliate with the vendor in question. Sigma-Aldrich customers will order through their group ID.

Please note that e-commerce purchases result in an immediate charge directly to the PI’s project so it is very important to enter the chartfield correctly. Keep in mind that the user default chartfield number entered in the profile will be used for the purchase unless you specifically change it. For proper payment, verify the chartfield you have entered and saved in the document. Instructions for changing your default chartfield can be found [here](http://ccinfo.unc.edu/files/2014/05/ePro-Vendor-Catalog.pdf). The information you need starts on page 40.

**3 - P-Card Usage**

Most PI’s have a P-Card (Purchasing card/credit card), that they may use to order research lab and office supplies only when the charge will go on the PI’s Chemistry Or Other University Department’s research account. If you are not sure where the chartfield string you want the charge posted to is managed thru – please see the PA before placing the order. P-Cards can greatly streamline the purchasing process, but there are some specific procedures that must be followed in their use.

• P-Card purchases may NOT exceed $2500 per order and in most cases not greater than $5,000 can be purchased per month and this includes shipping costs. Issued P-Cards have a transaction and monthly credit limit.

• Purchases with Chemistry issued P-Cards CANNOT be paid for by Non-Chemistry administered accounts.

There are individual(s) (aka operator) assigned in each lab to track and enter the required data for the P-Card purchases into the Purchasing Card System. Please review these [instructions on how to use the Purchasing Card](http://www.unc.edu/finance/fd/ct/traindocs/pcard_manual.pdf) system in Finance Central. If the radio button is set to Approve do NOT click on the submit button at the bottom of the approvals page as instructed on page 14 of this manual. This role is for accounting only. You do need to use the approve button if you need to save any changes to the default chartfield string (verify that the radio button is on SAVE). The PA will need ALL supporting documentation (invoices, receipts, on line receipts, emails, order confirmations and packing slips) from your P-Card purchases to attach to the Bank Statement each month. Forward these documents to the PA as soon as you receive them based on the routine set up in your lab.

• There are certain items that may NOT be purchased with a P-Card. These include, but are not limited to: research gases, printing, travel, conferences, restaurants, alcohol, services of any kind (including repairs), radioactive materials, purchases from overseas vendors, products stocked in university storerooms, membership dues, tobacco, registration fees. Purchase of any of these items can result in the suspension of the PI’s purchasing card privileges.

For more information please read the [P-Card Handbook](http://financepolicy.sites.unc.edu/files/2012/04/1252_1rd-Purchasing-Card-Program-Handbook1.pdf).

**4 – Vouchers**

There are 4 general cases in which you would use a voucher .

**NOTE:** Vouchers CANNOT be used with vendors that are available on epro

(1) Your PI does not have a P-Card

(2) The vendor does not accept credit cards

(3) The total of the items ordered, including tax and shipping or other fees, exceed the $2500 limit placed on P-Card purchases but is less than $5,000. In this case, see the PA first for final determination as to what purchasing system to use.

(4) Payment for repair and service of equipment and/or maintenance. In these cases, after consulting with your PI, fill out a Purchase/Payment/Order and turn it in to the PA. The PA will let you know if any other documentation is needed and will then give your request an 8 digit number which is the voucher ID. . The turn-around time for a voucher # isgenerally 2 business days. You will be given the voucher ID e.g. 5018857, so that you can call the vendor directly and place the order. In this case the voucher is treated as a PO# (Purchase Order Number) by the vendor.

Payment is made after the receipt of the product or the service has been completed and the PA has received the invoice.

A print out of the voucher can also be given to you by the PA if the vendor wants a document faxed to them when you place the order.

• The [Supply/Purchase/Repair](http://imageserve.chem.unc.edu/resources/intranet/policies_procedures/supply_purchase_and_repair_form.xlsx) must include the correct REMITTANCE (where the payment is sent to) address.

**5 - Purchase Requests**

Purchase Requests generate PO#s - purchase order numbers

Typical examples of Purchase Orders are items that exceed $5000 in cost, or when a single item in the order is over $2,500. Service maintenance agreements, radioactive materials, and research gases are all processed with a purchase request. Additional supporting documentation is usually required for these purchases such as quotes and sole source/brand specific justification and a [Waiver of Competition Form](http://imageserve.chem.unc.edu/resources/intranet/policies_procedures/sole_source.pdf).Should you need a purchase request fill out a Purchase/Payment/Order Form and turn into the PA with the required documentation and the PA will route the purchase request.

**Never directly order an item being processed on a purchase requisition**, **purchasing department will place the order.**

**7 - Chemistry Storeroom**

The Chemistry Storeroom is operated by Fisher Scientific for the Department. The main storeroom, Ke A109, carries common laboratory equipment, and lab supplies, in particular serving the needs of the undergraduate laboratory program in Morehead and our research laboratories. This storeroom is open Monday – Friday from 8:00 AM to 4:30 PM, closed for lunch from 11:30 AM – 12:30 PM, and also when the University is closed.

Items carried in the storeroom can be purchased using your PI’s Project ID that is provided by the PA, with the specifics of who does the purchasing for your research group, using what Project ID, where you should turn in the invoice copy, etc., varying between each research group. Consult with your group’s PA or a senior member in your group to get the “house rules”.

Chemicals, solvents, liquid nitrogen, and dry ice stocked in Ke A104, are available on a 24/7 basis, so that you don’t need to stock large volumes of solvents in your laboratory. Purchase of items from this storeroom is on an honor system basis. There is a barcode scanner on the small table next to the dry ice storage locker. Directions for its use are posted; see storeroom personnel in Ke A109 for training and assistance. When granted access to Ke A104 the ONECARD reader requires swiping for entry; make sure to bring & use only your ID card. For purchases from sponsored projects, enter the project ID. For purchases on faculty startup funds, enter all zeros. A log of the accesses & swipe’s are kept within the department. Inventory of items stocked may be found on the laptop in Ke A104, which is also used to log liquid nitrogen purchases.

**Reimbursements**

**Important:**

Use the appropriate University purchasing system to purchase items for your laboratory. Reimbursement for purchases made outside of the University systems for use in the laboratory can no longer be guaranteed due to more stringent audit regulations. Simply put – you may not be reimbursed for out-of-pocket purchases. If for some reason you do require a reimbursement see your PA for information as to how to request an exception.

**For hosting visitors**

You may be asked to take a visiting seminar speaker to lunch. Please fill out the [Request For Chemistry Reimbursement of Entertainment Expenses](http://imageserve.chem.unc.edu/resources/intranet/policies_procedures/entertainment_expense.pdf) form and submit it with a detailed receipt to the PA. Before taking the guest out to dinner be sure to read and understand the reimbursement policy, which includes dollar and number of people limits. This reimbursement does include tip.

**Travel**

**Travel Advance**

The PA is responsible for processing travel advances and reimbursements. To obtain a travel advance, submit the advance request form 4-6 weeks before the trip begins. Graduate students may receive advances for lodging, registration and meal per diem. The [advance form](http://imageserve.chem.unc.edu/resources/intranet/policies_procedures/Travel_Exp_Affiliate.xlsx) must be filled out completely and correctly in order for the request to be processed in a timely manner.

Registration can also be paid directly from the PIs fund that is supporting your trip **IF** you provide the needed information and documentation to the PA 4-6 weeks prior to the registration deadline. Registration will no longer be reimbursed prior to the trip unless there is documentation on the registration or conference website that registration cannot be made by check.

**Airline Purchases**

Reimbursement for purchase of airline tickets is not available as part of the travel advance. In order to avoid carrying the airline expense until after the trip you must fill out the [Airfare Request](http://imageserve.chem.unc.edu/resources/intranet/policies_procedures/Travel_Exp_Affiliate.xlsx), formerly known as CABS.

**Travel Expense**

Within a week of your return you should submit all original receipts with your [reimbursement form](http://imageserve.chem.unc.edu/resources/intranet/policies_procedures/Travel_Exp_Affiliate.xlsx) to the PA. This form must be turned in if you requested an advance even if you are not requesting any additional reimbursement. Required receipts include but are not limited to, hotel, airfare and registration form/badge. Note that receipts for food are not required since per diem rates determine the amount to be reimbursed for food. Registration prior to the trip is no longer a reimbursement if payable by check. If payable by check the traveler should see his/her PA 4 weeks prior to the registration deadline and if not payable by check proof from the registration website needs to be turned in.

**Some hints and FYI:**

1) Meals that are included part of the registration are not reimbursable in the per diem section.

2) Rental cars need justification and may not be reimbursable if you flew to the conference and the hotel room is close to where the conference is being held.

3) Use of the personal car needs a specific justification. Depending on the circumstances the mileage reimbursement will likely be at the lower “convenience” rate

4) Payment for airfare cannot be reimbursed until after the trip (see CABS for better option)

5) If you make your own airline reservation outside of CABS be aware that agent fees are not reimbursable.

6) On international flights, US Flag Carriers must be used whenever available or the flight will not be reimbursable.

7) Membership dues are not reimbursable even if included in the registration.

**Fellowships**

All fellowship applications whether electronic or hard copy submission must be routed through chemistry and the university BEFOREsubmission to the agency; see Laura Condie for assistance.

[condie@email.unc.edu](mailto:condie@email.unc.edu)

919-966-5433

**Scheduling Department Resources**

Department Resources include conference rooms, digital camera, and digital projectors. Instructions on how to reserve these resources can be found [here](http://imageserve.chem.unc.edu/resources/intranet/grads/calendars.pdf).

**Campus Personal Use Policy**

Personal use of University telephones, fax machines, mail services, and vehicles is prohibited. University policies can be found at [this link](http://financepolicy.unc.edu/policy-procedure/105-personal-use-policy/).