

Administrative Professionals Forum – July 24, 2008
Smith Conference Room 11:30 AM to 1:00 PM
Notetakers: Judy Fenwick, Sheila Hurst

Sheri DiRosa & Dina DiCarlo – Cutting Down on Postage Costs

A fact sheet was distributed with hints on ways to save money on postage, especially on bulk mailings or media mail. The fact sheet is available on the web at:
<http://www.who.edu/services/facilities/internal/LargeMailings.doc>

Penny Hilliard & Maeve Thurston – Overview of Property Office Web Site

- The Property Office reviews purchase orders on a daily basis in order to track equipment. Equipment over \$5K is tagged in the property system. Tag numbers and serial numbers are written into the PO in the itemization area. This information is also available on the packing slip.
- For a project that is expiring, leftover equipment must be transferred to another related award or another federally funded project if there isn't a related project.
- If the equipment is obsolete, a disposal request should be filled out and the equipment will be picked up.
- The fabricated equipment form needs to be filled out whenever anything is built that will have a value of more than \$5K. This is not needed if it's a component, but it is needed if it functions on its own. The form should be filled out when the award comes in or as soon as the information is available. Once the form is filled out, the equipment will be tagged and tracked. This is an auditing issue.
- Other equipment forms available on the Property Office web site: transfer request (transferring equipment from one custodian to another), requesting used equipment, loaning equipment to another institution, home use request, lost or damaged equipment report.
- Auditors are now doing floor-to-record checks. This means that they will check the property tag records in the property office and then look for the equipment to see if the recorded location matches the actual location.

Deb Hamel – MEDEX and World Risk (AIG Assist) Coverage

- WHOI business travelers can use either MEDEX or World Risk for insurance coverage while traveling.
- Travelers should cut out the cards that are printed on the forms and have them laminated so that they'll have easy access to the policy numbers and phone numbers in case of emergency.
- Available services include worldwide medical and dental referrals, replacement of prescription medications or corrective lenses, coordination of medical records transfer, emergency medical evacuations, and coordination of transportation for family to join a hospitalized member.

- A comparison chart is available at:
http://www.who.edu/administration/FandA/internal/Insurance%20Cards/AIG_%20Assist_MEDEX_Comparison.pdf

Mary Ann White – Reminders for Travel Forms

- Travel authorizations are not needed for day trips.
- Travel vouchers must be for one person/trip but a group travel authorization is ok for a workshop or cruise if individuals are named and traveling on the same dates.
- When a traveler takes out a cash advance with a WHOI corporate card, those expenses need to be itemized on the travel voucher with receipts attached. If the traveler took out cash that wasn't used on the trip, the traveler needs to pay that amount back to VISA. The cash advance fee charged by the WHOI corporate card is diverted from the corporate card so there's no need to include that on the voucher. ATM fees may be itemized as an expense on the travel voucher.
- If the travel authorization is sent in before the travel expense voucher, please send a copy of the travel authorization along with the travel expense voucher.
- If the travel voucher is a pre-pay (sent in for reimbursement before the trip occurs), please include the travel authorization with the expense voucher.
- Stamp or note "original" and have the traveler sign underneath for any copies or faxes that are to be considered originals.
- Remember to separate out the Massachusetts sales tax and add the amount to the last line on an RFP since MA sales tax can not be charged to government projects.

Supplementary Notes:

- RTS is creating a "cheat sheet" with procedures and tips for APs.
- Joanna Ireland is available to meet with any department group for a question and answer session.

Future Forum Topics:

Invite Susan Avery to meet with APs
Health and Safety, TechTips (Trish White), Exercise Program (Ron Timm)
AV Equipment Capabilities in Each Conference Room
Announcement of Linda Benway's replacement