

ONLINE PEOPLESOFT SERVICE CENTER MODULE

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ONLINE PEOPLESOFT SERVICE CENTER MANUAL

You can now complete your Service Center Rates online.

Three players involved:

- 1) Office of Facilities and Administrative Analysis
- 2) Service Center Facility
- 3) College

Link to Service Center Bolt on Module:

MyPack Portal/Main Menu/Financials Systems/Service Center

Service Center Overview:

- There are four components associated with the People-soft Service Center Module:
 - Facility Setup
 - Rate Name Setup
 - Rate Request Form
 - Overview

(NOTE: this manual covers all four of the components mentioned above.)

Access to Service Center Module:

- Before any user can access the Facility Setup, Rate Name Setup and/or the Rate Request Form, individuals must complete system training by OF&AA. Please contact the Office of Facilities and Administrative Analysis at 515-1885 for training. In addition a SAR request by the service unit /department has to be submitted and approved. Two roles for Service Center SAR Requests:
 - 1) **Service Center Administrator**-This would be the role to give to someone who is responsible to keep Facility Setup current and create Rate Name Setup. If you are unsure who the Administrator would be, please call Cost Analysis at 515-1885
 - 2) **Form Approvers**-This would be for all approvers to the Rate Request Form including the Service Center Initiator who is the person entering the Rate Request Form details.
 - 3) Both (A User can have Both Roles, if needed.)
- Unlike in the past, a Service Center project ID is not necessarily considered a Service Center Facility
- Service Facilities can have multiple project IDs based on how your college defines their Service Facilities. (For example, Analytical Instrumentation Facility has many project IDs under one facility)

New Service Center Facilities: (This is not done in the service center module)

- Once you have defined your Facility and if the facility is new, you should call the Office of Facilities and Administrative Analysis (515-1885) for training on establishing a Service Center.
- You should also select a Service Center Rate Administrator (person completing the Facility and Rate Name Setup components) and an Initiator (person completing rate request form) prior to the meeting that will be completing the required forms.
- Cost Analysis (OF&AA) will meet with the Service Center Administrator, Service Center Director and the Initiator to go over service center requirements.
- OF&AA is the only unit that can set up a new Service Center Facility as well as assign the Service Center Administrator role in the online system.
- At this point a SAR request should be submitted for all the users associated with the service facility. (Please refer to page 2 for the SAR roles needed). SAR requests only need to be done once for the Service Center Module.
- Once the SAR roles have been requested (if needed), The following are the user types associated with the online version of the service facilities:

1) Service Center Rate Administrator - Is responsible for the information on the Facility Setup and Rate Name Setup

2) Initiator - Is responsible for entering the details on the Rate Request Form.

3) Service Center Director - Head of the facility and a rate request form approver

4) Financial Fund Approver - Person responsible for the financial aspects of the rate request form and form approver

5) Department Head - Head of the Department and form approver

6) Financial LEAD - Business Officer in the College and form approver

7) Service Center Inquirer - Can see the details of the rate request form but is NOT a form approver

CREATING THE FACILITY SETUP:

NOTE: Only the Office of Facilities and Administrative Analysis can create a new facility. However once it is created, the Service Center Administrator can edit General and Contacts/Approvers tabs as well as insert information in the Personnel tab.

- There are 3 tabs associated with the Facility Setup page:



The screenshot shows a web interface for Facility Setup. At the top, there are three tabs: 'General' (highlighted in red), 'Contacts/Approvers', and 'Personnel'. Below the tabs, the following information is displayed: 'SetID: SHARE', 'Facility Code: SC000013', and 'Status: Active' with a dropdown arrow.

- 1) General-OF&AA completes all the pertinent information related to the Facility such as Name, Description, Website, and Department number based on the information provided by the service center personnel.
- 2) Contact/Approvers-OF&AA will populate all the Contacts/Approvers for the workflow based on the information provided by the service center personnel after all have obtained their SAR access. Once all the required types are filled, the Facility's status will change from "Pending" to "Active". OF&AA will then notify the Service Center Director/Administrator that Facility has been set up and Service Center Administrator can now add people to its personnel tab as well as create Rate Name Setup.
- 3) The Administrator can locate the Service Center Facility through searching on either the Facility code, the Department number or the Service Center Facility status.
- 4) The Service Center Rate Administrator now and at anytime in the future has the ability to go into the Facility Setup page and edit the information on any of these three tabs.
- 5) Personnel-Service Center Rate Administrator can list all employees associated with facility on this tab.

Facility Setup

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

SetID begins with ▼ SHARE

Facility Code begins with ▼

Department begins with ▼

Status = ▼ ▼

Search

Clear

Basic Search



Save Search Criteria

Above is the screenshot to find an Existing Value on the Facility Setup. Only the Office of Facilities and Administrative Analysis can Add a New Value. The user can Find an Existing Value searching by Facility Code, Department or Status as well as via different filters in the dropdown. Also there is a magnifying glass if you don't know the Facility Code or the Department or you can select "Contains" on the dropdown and enter a partial number for Facility Code or Department. If you are having difficulties, please contact Cost Analysis at 515-1885.

Below is a snapshot of the user types that are associated with a service facility.

SetID: SHARE Facility Code/Name: SC000013 Solid Freeform Facility

Type	User ID	Name	Employee Status
1 Service Center Rate Admin	TGSAULS	Teresa G Sauls	Active
2 Service Center Director	SBHORTON	Sandra B. Horton	Active
3 Financial Fund Approver	TGSAULS	Teresa G Sauls	Active
4 Department Head	JEBEASTO	Joy E Beaston	Active
5 Initiator	TGSAULS	Teresa G Sauls	Active
6 Financial Lead	VAHALL	Virginia Allen Teachey	Active

* The following contact/approver types are required:
 * Department Head
 * Financial Fund Approver
 * Financial Lead
 * Initiator
 * Service Center Director
 * Service Center Rate Administrator
 Service Center Inquirer (Optional)

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display

General | Contacts/Approvers | Personnel

- After the Service Center Administrator finds the Facility and the applicable SAR requests have been approved, the Service Center Administrator should go into the Facility Setup page and assign unit's user types on the Contacts/Approvers tab. Please make sure the individuals have SAR request approvals for their respective roles.
- On the Personnel tab of the Facility Setup page (see below), the Service Center Administrator has the option of selecting all the Permanent Full Time personnel working in the entire Facility or they will have the option to set up personnel at applicable Rate Name Setup level or a combination of both.) If the facility has many rates/services, it may be best to add all the Full time permanent personnel working on all the rates at the Facility Setup level. If the Facility only has a few Rates/Services, the Administrator may decide to add the Full Time Permanent Personnel at the Rate Name Setup level. The Initiator will be able to see the personnel that has been added on the Salary Details page of the Rate Request form once the individuals have been added. A personnel tab has been added to the Facility as well as the Rate Name setup for flexibility. It's really a decision by the Service Center Administrator where to add the Full Time Permanent Employees. They should NOT be added in both places.
- The Administrator can search on the name or enter the Empl ID.
- The Administrator must also select the Employee Type/Fringe Benefit type for each employee. (Click the magnifying glass for details). The administrator should choose the employee type for each individual based on the listed definitions in the search menu.

SetID: SHARE Facility Code/Name: SC000013 Solid Freeform Facility

Personnel - Permanent Full-Time Employees only Personalize | Find | First | 1-2 of 2 | Last

Level	Employee Type	Empl ID	Employee Name	Employee DeptID	Employee Status	Position Title	Employee Type Description		
1 Facility	B	001114575	Penelope A Pittstop	112101	Active	Assoc Professor	Full Time SPA/EPA Optional Retirement >=.75 FTE and a 9 month or greater appointment	+	-
2 Facility	A	001114576	Speed Racer	514001	Active	Bus & Tech App Analyst	Full Time SPA/EPA TSERS >=.75 FTE and a 9 month or greater appointment	+	-

- Once the Service Center Administrator has completed the Contact/Approver part of the Facility Setup Page and and/or the Personnel tab (optional) and hits “Save”, the Facility will change from “Pending” to “Active”. See page 4 above for screenshot.
- Service Center Rate Administrator is NOT required to select personnel on the Facility Setup Page. The Administrator has the option of selecting the Full Time Permanent Personnel on the Facility Setup or the Rate Name Setup but not both.
- Once the Facility is Active, the Administrator can go to the Rate Name Setup page.

CREATING THE RATE NAME SETUP:

- RATE NAME SETUP: (Responsibility of the Service Center Rate Administrator):
- There are two components to the Rate Name Setup page:



- 1) General-Includes the Rate/Service Name and Rate/Service Description, Rate contact and Notes.
- 2) Personnel-To be completed for full time individuals providing effort on the particular service if the personnel was not selected at the Facility Setup level. Part time individuals will be entered on the Rate Request Form.

The Service Center Rate Administrator can Find an Existing Rate if any Rate Name Setups were previously added, or if a Rate already exists.

A screenshot of the 'Rate Name Setup' search interface. At the top, the title 'Rate Name Setup' is displayed in blue. Below it, a instruction reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (highlighted in red) and 'Add a New Value' (grey). Below the tabs is a 'Search Criteria' section with a dropdown arrow. It contains four rows of search fields: 'SetID:' with a 'begins with' dropdown and a text box containing 'SHARE'; 'Rate Name Code:' with a 'begins with' dropdown and an empty text box with a magnifying glass icon; 'Facility Code:' with a 'begins with' dropdown and a text box containing 'SC000013' with a magnifying glass icon; and 'Status:' with an '=' dropdown and an empty dropdown menu. At the bottom of the search criteria are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search area, there are two links: 'Find an Existing Value' and 'Add a New Value'.

The Administrator may add a new rate/service for all new services.

Rate Name Setup

Find an Existing Value | **Add a New Value**

SetID: SHARE

Rate Name Code: NEXT

Facility Code: SC000013 🔍

Add

- Once all the rate/services have been added or existing rate/services have been IOF&AAted, the Service Center Rate Administrator can:
 - 1) If New- Complete Rate Name, Description, Rate Contact and Notes
 - 2) If Existing-Edit Rate Name, Description, Rate Contact and Notes.
 - 3) Click the save button at the bottom when complete.

Below is an example of an existing Rate

General Personnel

SetID: SHARE Rate Name Code: SC000013-001 Status: Active ▼

Facility Code/Name
SC000013 Solid Freeform Facility

Rate Name
Connex-350

Description
Build Metal components and samples via ARCAM S12

Rate Contact
Teresa Sauls

Notes

Created By: TGSAULS Date Created: 10/02/2015 1:53:14PM
Updated By: TGSAULS Date Updated: 10/02/2015 2:11:37PM

- If the Rate doesn't already exist, The Service Center Administrator adds and completes a Rate Name Setup for each service the service facility provides. Information included is: Rate Name, Rate Description, Rate Contact and Notes.
- Rate Name Setups are not "Active" until the Rate Request Form has been approved by either (a) the Office of Facilities and Administrative Analysis if charging Sponsored C&G projects or External Federal customers or (b) the College Financial LEAD if NOT charging Sponsored C&G projects or External Federal Customers.
- As mentioned on page 5, the Service Center Administrator has the option of selecting only the Permanent Full Time personnel on each of the Rate Name Setup pages, or selecting all the Permanent Full Time personnel in the facility on the Facility Setup page or a combination of both. If a Full Time Permanent Employee was added on the Facility Setup, you should NOT add him/her on the Personnel tab in the Rate Name Setup. Only add name(s) to the Personnel tab in the Rate Name Setup that were not added in the Facility Setup Personnel Tab. Part Time/Non-Permanent employees can only be added to the Rate Request form (discussed later in this manual.)

On the slide below, you will see two individuals listed that were from the Personnel tab in the Facility Setup page (under “Facility” section) and one individual working exclusively on Rate Name under “Rate” section from the Personnel tab in the Rate Name Setup page. However, the Administrator may add all the Full Time Permanent Employees at the Facility Setup level. The Personnel tab was added to both the Facility and Rate Name Setup levels for user flexibility and convenience.

General Personnel

SetID: SHARE Rate Name Code/Name: SC000013-002 arcams13

Facility Code/Name
SC000013 Solid Freeform Facility

Personnel - Permanent Full-Time Employees only

Rate (If applicable & not listed below in Facility Section)

Level	Employee Type	Empl ID	Employee Name	Department	Employee Status	Position Title	Employee Type Description
1 Rate	A	001114574	Donald Duck	150413	Active	Research Database Admin	Full Time SPA/EPA TSERS >=.75 FTE and a 9 month or greater appointment

Facility

Level	Employee Type	Empl ID	Employee Name	Department	Employee Status	Position Title	Employee Type Description
1 Facility	B	001114575	Penelope A Pittstop	112101	Active	Assoc Professor	Full Time SPA/EPA Optional Retirement >=.75 FTE and a 9 month or greater appointment
2 Facility	A	001114576	Speed Racer	514001	Active	Bus & Tech App Analyst	Full Time SPA/EPA TSERS >=.75 FTE and a 9 month or greater appointment

CREATING THE RATE REQUEST FORM:

Finding an Existing Value

NOTE: Service Center Initiator is responsible for this component.

The user can find an Existing Value if there was a previous Rate Request Form prepared.

You can select “begins with” or if you prefer, you can use the dropdown and select “Contains” for any search criteria. If the Facility has services with multiple project IDs, you can search on the Facility code and all the rates along with the respective project IDs will appear or just search on the project IDs one at a time.

The screenshot shows the 'Rate Request Form' search interface. At the top, there are two tabs: 'Find an Existing Value' (active) and 'Add a New Value'. Below the tabs is a 'Search Criteria' section with several input fields:

- Business Unit: begins with [NCSU1]
- Request ID: begins with []
- Request Date: = [] [31]
- Facility Code: begins with [SC000013] [magnifying glass icon]
- Rate Name Code: begins with [SC000013-001] [magnifying glass icon]
- Project ID: begins with [] [magnifying glass icon]
- Created By: begins with [] [magnifying glass icon]
- Request Status: = [] []

There is a checkbox for 'Case Sensitive' which is currently unchecked. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

NOTE: As you work through the rate request form, it is recommended that you save the entered information often. You can save the information as many times as necessary before submitting. Also, system requires before first “SAVE”, the field “Unit of Usage” in a year must have a value entered.

- The following are the tabs you will see at the top of the Rate Request form.

The screenshot shows the top portion of a web application interface. At the top, there are four tabs: "Rate Request Form" (highlighted in red), "Salary Details", "Facilities/Equipment", and "Comments". Below the tabs, the following information is displayed:

- Request ID: 0000000086
- Request Date: 10/02/2015
- Request Status: Completed
- Facility Code/Name: [SC000013](#) Solid Freeform Facility
- Rate Name Code/Name: [SC000013-001](#) Connex-350

Below this information, a section labeled "General" is partially visible.

- There are 4 tabs to the Rate Request form:
- 1) Rate Request form-Initiator will enter the Project Id, Check Box on Charge C&G and/or External Federal Customers, Direct Cost, Adjustments, Usage & Rate on this page.
- 2) Salary Details-This will show the Permanent Full Time Employees chosen from the Facility Setup Page and/or the Rate Name Setup Page. This is where the initiator can add Part Time/Non-Permanent employees as well.
- 3) Facilities/Equipment-This shows the Facility Building, Room and percent of time the Service Center activities take place in the listed Building and Room. Rooms cannot be allOF&AAated more than 100%. Also this tab list the equipment used on the rate. The initiator must list the Tag Number then all relevant data will be populated by the system. The initiator must check the Facilities/Equipment information is accurate or not which is applicable each time a service rate is developed in order to complete the Rate Request form and for it to be forwarded to OF&AA for review and approval.
- 4) Comments-Section for anyone in the workflow to enter any comments associated with the request form. We encourage use of this tab as it can provide valuable information regarding the data on the Rate Request Form to help with the review/approval process.

NOTE: Due to data inter-dependency between the Rate Request form tab and the Salary Detail tab, user may be required to enter data back and forth between the two tabs at different times thus the following information is written to direct the user when to enter data on the different tabs of the Rate Request form.

If a previous Rate Request form exists, the user SHOULD copy the previous rate by using the **COPY** feature on the right of the Rate Request form. However, some data will NOT be copied. Once the copy feature is used, the user must start by completing the project ID on the rate request form and select whether the rate will charge contract and grant sponsored projects or External Federal Customers. Once this information is provided on the form page the initiator can move onto the Salary Details tab. NOTE: If the user must create a new rate form due to a new service, the Service Center Administrator must add the Rate/Service Name Setup prior to creating a new form as without the associated Rate Name Setup, the new Rate Request Form cannot be created.

ADDING A NEW RATE REQUEST FORM:

If a previous Rate Request form does not exist for the particular service, the Initiator should make sure the Administrator has added a Rate Name Setup for the service. Rate Name Setups and Rate Request Forms should be a one to one match. Once that has been added, the Initiator can “Add a New Value”. The Initiator should select the appropriate Facility code and Rate Name Code by using the magnifying glass search feature and click on Add and follow the appropriate steps.

The screenshot shows a web form titled "Rate Request Form". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". Below these are several input fields: "Business Unit" with the value "NCSU1", "Request ID" with the value "NEXT", "Request Date" with the value "06/27/2016" and a calendar icon, "Facility Code" with a redacted value and a magnifying glass icon, and "Rate Name Code" with a redacted value and a magnifying glass icon. At the bottom of the form is an "Add" button.

NOTE: Once the Initiator “Adds a New Value”, s/he can begin to complete the Rate Request Form in the same manner as if s/he copied an existing rate form. The Initiator must enter the Project Id, click the Check Box “Charge C&G Projects and/or External Federal Customers”, and enter a value in the Utilization Box and Save before proceeding. It is a quirky system requirement that before a Rate Request Form can be saved for the 1st time, the “Unit of Usage” in a year field must have a value entered.

SALARY DETAILS TAB:

After the Rate Form is copied or a New Value added the Initiator should begin with the Salary Details page.

The Salary Details page includes permanent labor that was entered on the Facility Setup or Rate Name Setup page by the Service Center Rate Administrator.

NOTE: Best practices procedure is to have the Initiator inform the Service Center Administrator prior to updating/adding a new rate to ensure that the Permanent Full Time Employees have been updated at the Facility or Rate Name Setup tabs. Temporary Non-permanent labor will need to be added by the Initiator on this Salary Detail tab.

Rate Request Form **Salary Details** Facilities/Equipment Comments

Request ID: 000000086 Request Date: 10/02/2015 Request Status: Completed

Facility Code Name Project ID
 SC000013 Solid Freeform Facility 307500

Rate Name Code Name
 SC000013-001 Connex-350

Salaries & Wages

Permanent Full-Time Employees Personalize Find Print First 1 of 2 Last

Empl ID	Employee Name	Position Title	Current Employee Status	Employee Type	Annual Salary	HR Salary Amount	% of Total Effort (Based on annual salary)	Service Center Salary (annual salary x effort)	Service Center Fringe ((Salary x Ben Rate) + Ins) x % Effort	Employee Type Description	Benefit Rate	Health Insurance Amount
1 001114575	Penelope A Pittstop	Assoc Professor	A	B	76,400.00	76,400.00	5	3,820.00	1,083.39	Full Time SPA/EPA Optional Retirement >= 75 FTE and a 9 month or greater appointment	21.20	5,471.00
2 001114576	Speed Racer	Bus & Tech App Analyst	A	A	86,000.00	86,000.00	10	8,600.00	2,582.72	Full Time SPA/EPA TSERS >= 75 FTE and a 9 month or greater appointment	23.67	5,471.00

- NOTE: If it is determined that there are new employees to the service or any existing employees that are no longer working in the service facility, the Service Center Rate Administrator must update the Permanent Full Time Employee Names on either the Facility Setup or Rate Name Setup pages prior to the Salary Details being completed on the Rate Request Form.**

- The HR Salary Amount will populate based on the most current information in the HR system. If this is correct, the initiator will need to type that amount in under the Annual Salary section. If not correct for the service center then the correct amount should be entered in the Annual Salary section.
- The initiator is then required to enter the percent of effort for how much time the listed individuals are working on this particular service even if the individual is being paid by a different source.
- If the individual works in the Facility but is NOT working on that particular service, the individual personnel will need to be deleted by clicking the (-) button to the right of the row.

Rate Request Form **Salary Details** Facilities/Equipment Comments

Request ID: 000000086 Request Date: 10/02/2015 Request Status: Completed

Facility Code Name: SC000013 Solid Freeform Facility Project ID: 307500

Rate Name Code Name: SC000013-001 Connex-350

Salaries & Wages

Permanent Full-Time Employees

Empl ID	Employee Name	Position Title	Current Employee Status	Employee Type	Annual Salary	HR Salary Amount	% of Total Effort (Based on annual salary)	Service Center Salary (annual salary x effort)	Service Center Fringe ((Salary x Ben Rate) + Ins) x % Effort	Employee Type Description	Benefit Rate	Health Insurance Amount
1 001114575	Penelope A Pittstop	Assoc Professor	A	B	76,400.00	76,400.00	5	3,820.00	1,083.39	Full Time SPA/EPA Optional Retirement >= 75 FTE and a 9 month or greater appointment	21.20	5,471.00
2 001114576	Speed Racer	Bus & Tech App Analyst	A	A	86,000.00	86,000.00	10	8,600.00	2,582.72	Full Time SPA/EPA TSERS >= 75 FTE and a 9 month or greater appointment	23.67	5,471.00

NOTE: The Service Center Rate Administrator cannot add Part Time or Non-Permanent employees at the Facility or Rate Name Setup. These can only be added on the Rate Request Form by the Initiator on each individual Rate Request Form.

Request ID: 000000086 Request Date: 10/02/2015 Request Status: Completed

Facility CodeName: SC000013 Solid Freeform Facility Project ID: 307500

Rate Name CodeName: SC000013-001 Connex-350

Salaries & Wages

Permanent Full-Time Employees

Empl ID	Employee Name	Position Title	Current Employee Status	Employee Type	Annual Salary	HR Salary Amount	% of Total Effort (Based on annual salary)	Service Center Salary (annual salary x effort)	Service Center Fringe ((Salary x Ben Rate) + Ins) x % Effort	Employee Type Description	Benefit Rate	Health Insurance Amount
1 001114575	Penelope A Pittstop	Assoc Professor	A	B	76,400.00	76,400.00	5	3,820.00	1,083.39	Full Time SPA/EPA Optional Retirement >= .75 FTE and a 9 month or greater appointment	21.20	5,471.00
2 001114576	Speed Racer	Bus & Tech App Analyst	A	A	86,000.00	86,000.00	10	8,600.00	2,582.72	Full Time SPA/EPA TSERS >= .75 FTE and a 9 month or greater appointment	23.67	5,471.00

Part-Time or Non-Permanent Employees

Empl ID	Employee Name	Position Title	Current Employee Status	Employee Type	Annual Salary	HR Salary Amount	% of Total Effort (Based on annual salary)	Service Center Salary (annual salary x effort)	Service Center Fringe ((Salary x Ben Rate) + Ins) x % Effort	Employee Type Description	Benefit Rate	Health Insurance Amount
1	TBD	Student Worker		C	9,000.00		75	6,750.00	583.63	Part Time/Permanent TSERS SPA/EPA <= .75 FTE	8.35	

Return to Search | Previous in List | Next in List | Notify

Add | Update/Display

- When adding Part time or Non-Permanent Employees, If the Empl ID and/or Employee Name are known, please enter them. If not, as in the case they'll be hired soon, please just list TBD. In either case, need to insert Position Title, Employee/Fringe Benefit Type, Annual Salary and % of Effort that the employee is working on this service rate. The fringe benefit amount will calculate accordingly once the Employee Type and all required fields have been populated. **(NOTE: Rates should be based on actual costs that will be incurred in providing the service; thus, unless hiring is imminent, it is better not to not include those future labor costs. One can always revise the rate once hiring is completed.)**
- Once all Salary information has been listed and updated on the Salary Details tab of the particular rate/service, the sum of these expenditure amounts will automatically populate the grayed out Salaries and Benefits fields in the Direct Costs section on the Rate Request form.
- The Initiator should now be able to complete the other fields on the Rate Request form.

Direct Costs section— NOTE: List all direct costs necessary to perform service even if a different funding source is paying for part of the costs. You will use the direct cost subsidy line in the adjustments section to subtract any costs paid from a different source. Include all direct costs and all utilization for both internal and external customerS.

Direct Costs	
Total Salaries:	0.00
Total Fringe Benefits:	0.00
Maintenance Contracts:	0.00
Repairs:	0.00
Technical Supplies:	5,059.00
Travel:	0.00
Other:	500.00
Total Costs:	5,559.00

Describe the Travel and Other Costs:

Other-Freight Charges
June 2015 - May 2016 Expenses

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EXAMPLES OF DIRECT COSTS:

- Salaries - After listing all permanent full time employees on the Facility Setup or Rate Name Setup Page, you would also list all temporary employees on the Salary Detail tab of the Rate Request Form. List their percent of effort they are working on the service regardless if they are paid by the service center project ID or not. If they are NOT paid by the service center project ID, you would list all individual salaries and associated fringe benefits as a credit on the Direct Cost Subsidy line along with all other costs the service center project ID is NOT paying for.
- Fringes - Once you choose the employee type on the Facility Setup or Rate Name Setup for all Permanent Full Time Employees and on the Salary Details tab of the Rate Request form for you entered the Temporary Employees, after the percent of effort has been entered, the system will calculate the associated fringe benefits based on the Employee Type you entered.
- Maintenance Contracts - Enter the total annual costs of maintenance contracts directly related to the service. Consider maintenance on scientific equipment, agricultural equipment (combines or tractors) used in the field, microscopes, spectrometers, or any other equipment that is directly related to providing the service. If same equipment is used by multiple services, need to prorate the expense per % benefit received. Also, need to attach copy of maintenance contract to rate request form to substantiate the expense. If it is made up of many equipment, need to provide listing of equipment covered by the maintenance contract.
- Repairs - Enter the total annual costs for non-routine repairs that relate directly to items used in providing this service. Examples might include repairs to combines, scientific equipment, vehicles, etc.

- Technical Supplies- Enter the total annual costs for technical supplies used in providing this service. Examples may include pipettes, syringes, special chemicals and other expendable supplies under \$5000 that are directly related to the service being provided. **(NOTE: Office supplies are a component of departmental administration, and therefore cannot be included as a direct charge.)**
- Travel- Enter the total annual costs for travel directly related to providing this service. This may include the costs of travel and lodging for training seminars or conferences of service center personnel directly related to their work. May need to be prorated depending on % of effort in the service center. Describe the Travel costs on the Rate Request Form in the section provided. **(NOTE: Customer specific travel should be charged at actual as add-on cost and not be included in the rate charging all customers.)**
- Other. (Please describe the "Other" Costs). Enter the annual total for any other expenses directly related to providing this service. "Other" examples may include extraordinary printing/freight charges, and equipment software.

NOTE: Administrative positions such as secretaries and bookkeepers generally would not be considered as direct costs because their roles are not technical in nature.

ADJUSTMENTS SECTION:

- Over/Under Applied Costs: Enter the Over Applied costs from previous period. Over Applied costs are direct costs that were over-estimated on a previously approved rate form and charged to customers. Over Applied cost may have occurred when estimated direct costs were too high or estimated utilization was too low for the service center. It is critical that the service center track their utilization and expenses to assist in determining the Over or Under applied costs. For Over Applied costs you would show a negative figure. (Although both Over/Under Applied are shown on the form, based on history, consistency, and best practice among peer institutions, we have not adjusted our rate calculations in Under Applied situations.)
- For all federal customers, whether internal or external, the service center cannot have more than a 60-day cash balance. You are however allowed to keep the amount you charge external non federal customers that is above the calculated federal approved rate.
- **IF YOU HAVE ANY QUESTIONS ABOUT CALCULATING THE OVER/UNDER APPLIED COSTS, PLEASE CALL THE OFFICE OF FACILITIES AND ADMINISTRATIVE ANALYSIS.**
- Direct Cost Subsidy - Identify and subtract the total amount of costs paid by another source (e.g. another Project ID or ledger) and list the project IDs that paid those costs or that supplied the funding to the service center. Direct Cost Subsidies should only happen in services taken place in lower ledger 3 and ledger 4 project IDs as upper ledger 3 projects are self-supporting trust funds and should pay for all their costs and not be subsidized by any state funding sources.

Adjustments	
Over/Under Applied Costs (of your previous year Direct Costs, if applicable)	0.00
Direct Cost Subsidy (only applicable to lower level 3 Project ID's)	-11,204.22
<i>List all other Project ID's covering the cost of the service</i>	
<input type="text" value="221450"/>	
Total Adjusted Costs:	36,195.52

Usage

USAGE SECTION:

UNIT OF MEASURE - Enter the basis or unit of usage applied in the service center's billings, i.e. "hours", "CPU hours", "number of samples", etc. On what unit of activity will you base your charge to customers? It is important to enter this information.

TOTAL OF SERVICES "UNIT OF USAGE" IN A YEAR - Enter the estimated number of hours, samples, etc. for the service for the upcoming year.

BASIS USED TO ESTABLISH UTILIZATION - Please list what basis you used to determine the current year utilization; ie, prior years' daily logs, average of last 3 years daily logs, etc.

Usage

Unit of Measure: * Total of Services "Unit of Usage" in a Year:

What is the basis used to establish the utilization?

RATE SECTION:

- The Initiator should put in the Desired Rate Effective Date.
- Rate--The system will calculate the Total Cost Calculated Internal Use Rate and the Total Adjusted Costs/Subsidized Internal Rate.
- Requested Internal Rate—This must be provided. Unit may charge what is calculated or the unit may request to charge a lower internal rate ONLY if non-federal external customers will pay more than the total cost and that amount is used to cover the difference to internal/federal users or if the department/college will subsidize if the service center is a subsidized service center then the Project ID providing the subsidy needs to be entered in the Adjustment section. If the unit wishes to charge a rate lower than the Total Adjusted Costs/Subsidized Internal Rate and the condition listed above is met, it should be listed on the “Requested Internal Rate-Below Adjusted/Subsidized Rate”.

Rate			
* Desired Rate Effective Date: 11/01/2015	Total Costs Calculated Internal Use Rate:	39.50	(47,399.74 / 1200) Total Costs/Units of Usage
	Total Adjusted Costs/Subsidized Internal Rate:	30.16	(36,195.52 / 1200) Total Adj Costs/Units of Usage
	* Requested Internal Rate-Below Adjusted/ Subsidized Rate:	30.00	<i>NOTE: Unit may request a lower internal rate ONLY if external customers pay more than total cost and that amount is used to cover the difference for internal users.</i>
Rate Effective Date: 11/01/2015	Approved Use Rate:	30.00	
Rate Expiration Date: 11/01/2017			

FACILITIES/EQUIPMENT TAB:

Facilities Information - Once the Initiator has completed the Salary Details and Rate Request form, the form cannot be submitted until the Facilities/Equipment tab is completed. Search feature allows Initiator (or any approver) to search for the Building this service takes place in. It also allows for the search of the valid rooms in that particular Building. The Initiator should list the percent the service takes place in that particular Building/Room keeping in mind that no space can be allOF&AAated more than 100%. **(NOTE: All activities in the room need to be considered when listing % utilized by Service).**

The Initiator must validate the information by clicking the check box beside the “Facilities Information below is correct or the service does not take place in NC State owned space” even if there is no facility the service/rate takes place in.

- Equipment Information—If there is any equipment used in the service rate, the Initiator should enter the Tag Numbers. A search feature will aid in this selection. Once the tag numbers are entered, the Asset ID, Description, Project IDs, In Service Date and Useful Live will automatically be populated by the system.
- The Initiator must validate the information by clicking the check box beside the “Equipment Information below is accurate or no capitalized equipment is used in delivering the service” even if there is no equipment.

Facilities Information

* Facilities Information below is correct or the service does not take place in NC State owned space.

Personalize Find			
First 1 of 1 Last			
Building Number	Building Name	Room Number	% Utilized by Service
1 042	Burlington Laboratory	01204A	25

Equipment Information

* Equipment Information below is accurate or no capitalized equipment is used in delivering the service.

Personalize Find					
First 1 of 1 Last					
Tag Number	Asset ID	Description	Project IDs	In-Service Date	Useful Life (Months)
1					

* Required field

COMMENTS TAB:

- Any comments can be added to the comments tab. We encourage the use of this comment section as this is the place to put any information the reviewers/approvers of the rate form(s) need to know.
- User can also use this section to preempt standard questions such as: (1) this is equipment rate only, no labor is involved, (2) no additional direct material will be charged to customer at actual cost, (3) external non-Fed customers will be charged more to cover the difference between calculated and requested rate, etc.

Rate Request Form | Salary Details | Facilities/Equipment | **Comments**

Request ID: 0000000086 Request Date: 10/02/2015 Request Status: Completed

Facility Code/Name: [SC000013](#) Solid Freeform Facility Project ID: 307500

Rate Name Code/Name: [SC000013-001](#) Connex-350

Comments (up to 254 characters per comment) Find First 1 of 1 Last

Entered by:

1

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Add](#) [Update/Display](#)

APPROVALS:

Once all tabs and all information has been updated/entered, the Initiator may submit the rate for review and approval. The workflow will be based on the types set up by the Service Center Administrator in the Facility Setup Contacts/Approvers tab.

Service Center Request

Business Unit: NCSU1, NC_SVC_FORM_ID=0000000086: **Approved** [View/Hide Comments](#)

OCA Approver Final

Self Approved ✓ Teresa G Sauls SVC Form Initiator 10/02/15 - 2:12 PM	→	Approved ✓ Sandra B. Horton SVC Form SC Director Approval 10/02/15 - 2:50 PM	→	Self Approved ✓ Teresa G Sauls SVC Form FinFund Appr Approval 10/02/15 - 2:50 PM	→	Approved ✓ Joy E Beaston SVC Form Dept Head Approval 10/02/15 - 2:52 PM	→	Approved ✓ Virginia Allen Teachey SVC Form Fin Lead Approval 10/02/15 - 2:53 PM	→	Approved ✓ Virginia C Burks Draughon SVC Form OCA Approval 10/02/15 - 2:56 PM
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Comments

Wade Brent Lemons at 10/02/15 - 2:55 PM
Reviewed and submitted for approval -10/2/2015 WBL

- There will be no auto approve for any approver other than the initiator who is also the next approver in workflow which is the SVC Director. If an individual has multiple types, s/he will have to approve each type instance.
- Rate Requests form can be denied at which time the rate goes back to the Initiator for revisions and resubmission.
- If Facility has multiple rates, this process needs to be done for each rate.

SPECIAL FEATURES:

- There are Print, Copy, Attachments, Delete and Guidelines buttons on the Rate Request form that allow the user to perform any of those functions.
- Print—Ability to print form once the form is saved.
- Copy - Can copy any rate form that has been final approved – if user has access to the form. This allows the initiator not to have to re-enter all information on a revised / renewed rate submission. However, certain tabs will have to be updated (i.e, Salary Details and Facilities/Equipment).
- Attachments - Unit is to attach any applicable documentation and this can be done even after Rate Request Form is approved. If same backup is applicable to multiple rates, this backup must be attached to each applicable Rate Request Form. Each Rate Request Form must be able to stand on its own to be reviewed and approved.
- Delete - Allows Initiator to delete a rate form (or any Approver in the workflow having access to the form until the form has status of “Complete”
- Guidelines - Link to OF&AA website for Service Center information.
- **If you need assistance with the development of a Service Center Use Rate, please contact 515-1885. More information can be accessed on our website at: <https://ofaa.ofa.ncsu.edu/service-center-overview/>**
- **Please be reminded that it is the Department / College’s responsibility to monitor and keep accurate accounting records for all Service Centers.**

OVERVIEW TAB

Favorites ▾ | Main Menu ▾ > Financial Systems ▾ > Service Center ▾ > Overview

Overview

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Facility Code begins with ▾ 🔍

Facility Name begins with ▾ 🔍

Department begins with ▾ 🔍

Status = ▾ ▾

Project ID begins with ▾

Case Sensitive

Search Clear Basic Search  Save Search Criteria

Anyone that has basic PeopleSoft financial system access can access the Overview tab.

A user can search by Facility Code, Facility Name, Department, Status, and/or Project ID.

If a user wants to see all facilities at the university, do not select any criteria and hit the search button. This will bring up all service facilities at the university.

Search Results

View All First ⏪ 101-131 of 131 ⏩ Last

SetID	Facility Code	Facility Name	Department	Status	Project ID
SHARE	SC000036	Analytical Lab	186401	Active	376290-83061
SHARE	SC000037	Ci3000 Weatherometer	186401	Active	376290-83064
SHARE	SC000038	TATM Advanced Testing Lab	180701	Active	376370
SHARE	SC000068	Alternative Farm And Field Day	112001	Inactive	376381-20323
SHARE	SC000047	Center for Chemical Toxic/Residue Pharmacology-Skin Center	196901	Active	376391
SHARE	SC000045	Clinical Pharmacology Lab	194001	Active	376408
SHARE	SC000061	Geographic Information System	150103	Active	376550
SHARE	SC000069	Fish And Wildlife Res Motor Vehicles	112101	Active	376573-07231
SHARE	SC000002	ANALYTICAL INSTRUMENTATION FACILITY (AIF)	140501	Active	376661
SHARE	SC000015	Nuclear Services Center	141101	Active	376676
SHARE	SC000002	ANALYTICAL INSTRUMENTATION FACILITY (AIF)	140501	Active	376760
SHARE	SC000002	ANALYTICAL INSTRUMENTATION FACILITY (AIF)	140501	Active	376777

Upon clicking a particular row of Facility Code/Project ID combination, one will see the following:

Favorites ▾ | Main Menu ▾ > Financial Systems ▾ > Service Center ▾ > Overview 

Overview

SetID: SHARE Facility Code: SC000047 Facility Name: Center for Chemical Toxic/Residue Pharmacology-Skin Center

Description: Provides consultation with veterinarians and livestock farmers about drug/chemical residues livestock. HPLC analytical development for antibiotic residues in milk.

Website: <https://cvm.ncsu.edu/one-health-one-medicine-research-at-the-nc-state-college-of-veterinary-medicine/>

Rate Names									Find	First	1-6 of 6	Last
Rate Code	Rate Status	Rate Name	Project ID	Rate	Effective Date	Expiration Date	Charge Grants?	Request ID #				
SC000047-001	Active	Sample Analysis Test	376391	24.02	04/25/2017	04/25/2019	Y	0000000949				
		Building #	Building Name	Room #				% Utilization				
		1 301	CVM Main Building	0D332				50				
Rate Code	Rate Status	Rate Name	Project ID	Rate	Effective Date	Expiration Date	Charge Grants?	Request ID #				
SC000047-002	Active	Live Animal Kinetics Test	376391	500.31	04/25/2017	04/25/2019	Y	0000000950				

Rate Code, Rate Status, Rate Name, Project ID, Rate, Effective Date, Expiration Date, Whether the Rate charges Contract and Grant Projects, Request ID # and a summary of the service center space such as Building #, Building Name, Room #, and % Utilization.

Any Questions: Contact the Office of Facilities and Administrative Analysis at 515-1885

2022/10/28