

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 Cost Analysis (OCA)
- 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 OCA. Please contact the Office of Cost 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 the Service Center Administrator. 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 Cost 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 (OCA) will meet with the Service Center Administrator, Service Center Director and the Initiator to go over service center requirements.
- OCA 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 Cost Analysis can create a new facility. However once it is created, the Service Center Administrator can add contact/approver and Personnel information.

- 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-OCA completes the Facility Name and Description based on a meeting with the Service Facility's staff (as described above).
- 2) Contact/Approvers-OCA will setup up the Service Center Administrator. Once this happens, the Facility's status will change from New to Pending.
- 3) The Administrator should now be able to locate the Service Facility through a search mechanism searching on either the Facility code, the Department number or the Service Center Facility status.
- 4) The Service Center Rate Administrator now has the ability to go into the Facility Setup page and add the Service Facility's various types and the personnel (discussed below).
- 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

Add a New Value

Search Criteria

SetID:	begins with ▼	SHARE
Facility Code:	begins with ▼	SC000013 
Department:	begins with ▼	
Status:	= ▼	▼

Search

Clear

Basic Search



Save Search Criteria

Find an Existing Value | Add a New Value

Above is the screenshot to find an Existing Value on the Facility Setup. Only the Office of Cost Analysis can Add a New Value. The user can Find an Existing Value searching by Facility Code, Department or Status. 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. You can also select from the status dropdown. 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

Navigation: 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”.
- NOTE: the 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. See page 5 above for more details on this.
- 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, a text box, and a magnifying glass icon; 'Facility Code:' with a 'begins with' dropdown, a text box containing 'SC000013', and a magnifying glass icon; and 'Status:' with an '=' dropdown and a text box. 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 located, 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.
- NOTE: Rate Name Setups are not "Active" until the Rate Request Form has been approved by either (a) the Office of Cost 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 them on the Rate Name Setup in the Personnel Section. Only add names to the Rate Name Setup Section that were not added in the Facility Setup Personnel Tab. Part Time/Non-Permanent employees can be added to the Rate Request form (discussed later in this manual.)

On the slide below, you will see two individuals that were selected on the Facility Setup page (under “Facility” section) and one individual working exclusively on Rate Name under “Rate” section. However, the Administrator may add all the Full Time Permanent Employees at the Facility Setup level. The Personnel tab was added at both the Facility and Rate Name Setup levels for users 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:** dropdown set to 'begins with', text input 'NCSU1'
- Request ID:** dropdown set to 'begins with', empty text input
- Request Date:** dropdown set to '=', empty text input with a calendar icon
- Facility Code:** dropdown set to 'begins with', text input 'SC000013' with a search icon
- Rate Name Code:** dropdown set to 'begins with', text input 'SC000013-001' with a search icon
- Project ID:** dropdown set to 'begins with', empty text input with a search icon
- Created By:** dropdown set to 'begins with', empty text input with a search icon
- Request Status:** dropdown set to '=', empty text input

Below the search criteria is a checkbox for 'Case Sensitive' which is 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.

- 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 for a Rate Request form. 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 'General' tab 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. The initiator has the option of choosing Part Time/Non-Permanent employees as well (discussed on page)
- 3) Facilities/Equipment-This shows the Facility Building, Room and percent of time the Service Rate takes place in the listed Building and Room. Rooms cannot be allocated more than 100%. Also this tab list the equipment used on the rate. The initiator must list the Tag Number and all relevant data will be populated. The initiator must check the Facilities/Equipment information below is accurate or not applicable each time a service rate is developed in order to complete the Rate Request form and forward to OCA for review and approval.
- 4) Comments-Section for all 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 Forms.

NOTE: Due to data inter-dependency between the Rate Request form tab and the Salary Detail tab, users will 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.

NOTE: 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 on 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 the Rate Name Setup and the Rate Request Form are linked.

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 displays the 'Rate Request Form' interface. 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 'NEXT', 'Request Date' with '06/27/2016' and a calendar icon, 'Facility Code' with a red search box and a magnifying glass icon, and 'Rate Name Code' with a red search box and a magnifying glass icon. At the bottom left, there is an 'Add' button.

NOTE: Once the Initiator “Adds a New Value”, they can begin to complete the Rate Request Form in the same manner as if they copied an existing rate. The Initiator must enter the Project Id, and 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.

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 1-2 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 hitting 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 Personalize Find [X] [Y] [Z] First 1-2 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: 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.

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

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	563.63	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, the Initiator does not have to list by Empl ID or Employee Name. If these are known, please enter them. If not known, Empl ID is not a required field. If the Employee Name is not known, please just list TBD. Please list the 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.
- 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 forward to the Rate Request form.
- The Initiator should now be able to complete the other required fields on the Rate Request form such as:

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 Temporary Employees, once 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.
- 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. Describe the Travel costs on the Rate Request Form in the section provided.
- Other. (Please describe the "Other" Costs). Enter the annual total for any other expenses directly related to providing this service. "Other" examples may include printing, freight charges, and equipment software.

NOTE: Administrative positions such as secretaries and bookkeepers that do not devote a significant amount of their effort to service center related activities would be reimbursed through the year end F&A allocation back to the colleges and are not allowed to be considered a direct cost on the service center. They would not be considered a direct cost if their role is 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 for Under Applied situation.)
- 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 over the calculated federal approved rate.
- IF YOU HAVE ANY QUESTIONS ABOUT CALCULATION THE OVER/UNDER APPLIED COSTS, PLEASE CALL THE OFFICE OF COST 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 other funding source.

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 actual 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.

Usage

Unit of Measure: <input type="text" value="Hours"/>	* Total of Services "Unit of Usage" in a Year: <input type="text" value="1205"/>
What is the basis used to establish the utilization?	
<input type="text" value="Prior Usage"/>	

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 to be completed. Unit may charge what is calculated or the unit may request to charge a lower internal rate ONLY if non-federal external customers pay more than the total cost and that amount is used to cover the difference to internal users. 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			
Rate Expiration Date: 11/01/2017	Approved Use Rate:	30.00	

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 allocated 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 be populated.
- 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.

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 <input type="text"/>			
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 roles set up by the Service Center Administrator in the Facility Setup Page

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 roles, s/he will have to approve each role 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.

Service Center Request

BUSINESS_UNIT=NCSU1, NC_SVC_FORM_ID=0000001173:Approved

OCA Approver Final

Self Approved ✓ Charles Randall Jones SVC Form Initiator 01/24/18 - 2:41 PM	→	Approved ✓ Chip G E Futrell, II SVC Form SC Director Approval 01/24/18 - 2:59 PM	→	Approved ✓ Charles Randall Jones SVC Form FinFund Appr Approval 01/24/18 - 3:02 PM	→	Approved ✓ Gregory Emma SVC Form Dept Head Approval 01/24/18 - 3:30 PM	→	Approved ✓ Charles Randall Jones SVC Form Fin Lead Approval 01/24/18 - 3:39 PM	→	Approved ✓ Jeannie Juain-Lin Chen SVC Form OCA Approval 02/07/18 - 8:18 AM
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Comments

System at 01/24/18 - 3:30 PM
Self Approved (18081,4050)

System at 01/24/18 - 2:53 PM
Self Approved (18081,4050)

System at 01/24/18 - 2:41 PM
Self Approved (18081,4050)

Save Submit ReSubmit Approve Deny

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 rate submission. However, certain tabs will have to be updated (i.e, Salary Details and Facilities/Equipment).
- Attachments—Allows unit to attached any applicable documentation even after final approved.
- Delete-Allows Initiator to delete a rate form (or any user having access to the form until the form has status of “Complete”
- Guidelines—Link to OCA 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:**
- <http://oca.ofa.ncsu.edu/service-center/>
- **Please remember 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

[Basic Search](#)  [Save Search Criteria](#)

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

A user can search by Facility Code, Facility Name, Department, Status, 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	000000949				
		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	000000950				

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.

Questions: Contact the Office of Cost Analysis at 515-1885

2020/03/31