

Carleton College Business Office

Business Office

Phone: 507-222-7095

Mail Stop: 1-BUSOFC

Business Hours:

8:00am-5:00pm

Cashier Hours:

8:30am-2:00pm

Business Office Forms:

<http://apps.carleton.edu/campus/business/businessofficeforms>

Frequent Contacts:

Departmental Deposits:

Brenda Schneider; 7095

Accounts

Payable/Payment

Requests: Melissa Smith;
7664

Purchasing Card

Assistance & Training:

Amy Swenson; 5509

Budget Access, Transfers

& Journal Entries: Karl

Symons; 4471

International Students &

Visitors: Shari Mayer;
4022

Payroll: Jennifer Paulson;
4283

Grant Management:

Susan Benson; 5990

Expense Reimbursement Survey:

Thank you for your participation in our recent expense reimbursement survey. We had a great response with nearly 80% of cardholders responding and 20% of non-cardholders. It is our goal to implement strategies and technology that help improve efficiencies for expense reporting. The survey results confirmed that we should continue to explore options to reduce reliance on paper documentation. Stay tuned for more improvements and updates on electronic receipt imaging!

Reimbursement Transition to OOP:

During FY2020, the Business Office will be transitioning all employee expense reimbursements to Wells Fargo Out of Pocket Reimbursements (OOP). For information about how to enroll and utilize OOP, click [here](#).

Employee expense reimbursements submitted to Accounts Payable using the paper Payment Request Form will be processed within 30 days from the date the form is received.

If you anticipate this reimbursement schedule will create a financial burden for you, we encourage you to contact Amy Swenson (x5509) to explore access to a Carleton Purchasing Card or Randie Johnson (x4178) for support in establishing a purchase order for direct vendor payment.

These measures are important initiatives to create consistency in our purchasing guidelines, address inequities between employees and eliminate the risk of duplicate payments to vendors and employees. We expect this change will reduce the time needed to submit reimbursements, reduce costs for Carleton and increase our annual rebate from Wells Fargo.

We appreciate your support as we move forward with this update and look forward to working with individual employees as they navigate this change.

Purchasing Card Application – OnBase Form:

We've recently updated our Carleton Purchasing Card Application! It is now electronically located on our Business Office website. Save paper by following the link below to access the new application:

<https://apps.carleton.edu/campus/business/purchasing-cards/card-program/>

Cheers to saving paper...one form at a time!

Fraud Alerts:

You can quickly and easily respond to purchasing card declines and fraud activity by enabling **Text Alerts** within your Wells Fargo account. This is very handy for cardholders that travel often on behalf of the college! Please follow the instructions below to enable this feature:

1. Select User Information, then Personal Profile, and choose Manage Alerts in the navigation menu.
2. The Manage Alerts screen is displayed.
3. Enter your mobile number and/or email address. (Text alerts cannot be sent to international mobile numbers.) Your email address on file is automatically displayed.
4. Choose **Text & Email** delivery preferences for **Fraud** and **Declines**.

Deposit Form:

Do you have cash and/or checks for deposit into a Carleton account? Please complete the [Deposit Form](#) to include along with your submission. Be sure to also include the full, 14-digit account number on the form. This detail ensures your funds will be deposited into the correct account.

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Amazon Business Prime:

In October we launched the Carleton Amazon Business Prime account, giving users two-day FREE shipping on all Prime eligible items. In the month of November, we made more purchases with Amazon than in October and saved 88% (or \$1,665) on shipping costs!

Not currently a Carleton Amazon Business Prime Member? Here is the information to register:

Cardholders:

Please contact Randie Johnson, rajohnso@carleton.edu, x4178 to receive an invitation to the account.

Non-Cardholders:

Non-Cardholders are not authorized to use the Amazon Business Prime Account. Employees interested in obtaining a Carleton Purchasing Card for business purchases, may initiate a request for a card through the [Purchasing Card Application](#) form. You will receive an invitation to Amazon Prime upon completion of purchasing card training.

Amazon Smile:

Once enrolled, you can support Carleton by ordering through Amazon Smile. Use your Amazon Business login credentials to shop at smile.amazon.com to support Carleton College and receive prime benefits every time you shop. On your first visit to AmazonSmile, select Carleton as the charitable organization to receive donations from eligible purchases. A full list of AmazonSmile FAQ's can be accessed with this [link](#).

Approved Driver Training:

Anyone driving a Carleton owned vehicle, business-rented vehicle, golf cart, gator, or personal vehicle driven on behalf of the College must be on the [approved drivers](#) list. Anyone who either wishes, or is required as part of his or her job to drive a College owned or leased vehicle must do the following:

1. Be presently licensed to drive a vehicle in the United States
2. Request an insurance review by filling out a [waiver](#) allowing the College to review their Motor Vehicle Report. Send the completed waiver to Randie Johnson in the Business Office.
3. Receive an "insurable" notice from the insurance company and
4. Complete an [online training course](#)

To access the United Educators [training](#) either log in with your preexisting UE information or register by using your name, email address and under Learning Path type: CarletonTraining. After you register, UE will send you a temporary password that you can change to a permanent password and take the course.

For more information about driving privileges, please refer to the [Campus Handbook](#).

Business vs. Personal Travel Comparison:

Bleisure is a portmanteau of "business" and "leisure" used to describe the mixing of business travel and vacation. We've also heard it referred to as *bizcation*. Either way, it is a growing trend for our travelers.

If you elect to plan a mix of travel, please use the [Business and Personal Travel Worksheet](#) and include the appropriate quote/documentation. One helpful tip: Complete the worksheet and gather the quotes at the time your airfare is booked to capture the price difference between personal and business itinerary. It can be difficult or nearly impossible to obtain this documentation after the fact.