Welcome Back!

Welcome to the 2021-2022 academic year! The Carleton Business Office staff are ready to support the students, faculty, and staff, as campus comes alive this Fall term. We look forward to gradually seeing more familiar faces. Please let us know if you have any questions regarding our policies and procedures. Many answers to your questions can be found on our website, HERE and in the FAQ section.
Introducing the Paperless Business Office

As you know, many processes have changed and been re-evaluated in the last 18 months. Creating a paperless office is an ongoing process, one which should be adapted and perfected over time. It requires a team effort and we would like to thank you for continuing to be flexible and open to changes in our processes and policies.

Please continue to embrace and support this cost effective and green transition in the following ways:

➢ Encourage new (and existing) vendors to participate in electronic payments.
➢ Request e-mail and/or electronic invoicing from vendors/contractors
➢ Submit your Payment Requests electronically to accountspayable@carleton.edu for processing
➢ Attach your receipts electronically to your Wells Fargo purchasing transactions
➢ Submit your Purchase Order Requests to purchasing@carleton.edu
➢ Add resources electronically to your OneCard through the GET portal https://www.carleton.edu/onecard/
➢ Direct gifts to our on-line portal https://www.carleton.edu/giving/
➢ Students and families can submit payments electronically to our on-line portal on The Hub
➢ Transfer/Journal Entry Requests should be submitted via the web under our business office forms.
Welcome New Staff!

MiKayla Christopher

MiKayla joined the Business Office earlier this summer in June as our Business Office Specialist, serving as first POC for the Carleton Business Office. She collaborates with all departments on campus to ensure timely and accurate cash receipting and deposits. She provides support to the student accounting team, purchasing, and accounts payable.

“I grew up in Western Wisconsin and obtained my Bachelor’s degree from University of Minnesota- Crookston in Quality Management in 2020. I have a passion for helping others and providing friendly and welcoming customer service to all people I work with.

My hobbies include dance, weightlifting, reading, (favorite authors include Thich Nhat Hanh and Tara Brach), spending time with friends, family, and my fur baby. (Team Dog!) I also enjoy exploring new restaurants and coffee shops!”

Deposit Forms

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.

Deposit forms can be found under Business Office Forms on our website.
Let’s Keep Connected!  
SEAMS Project Updates

The Carleton Business Office continues to actively participate in planning for the SEAMS Project which will replace our administrative system, Ellucian Colleague (aka The Hub). In order to keep the entire campus community informed and engaged the project is now supported by a website: https://www.carleton.edu/seams/. We hope you’ll visit this site for a comprehensive introduction and updates on the SEAMS project.

Target Tax Exemption Purchases

Target has modified their process to verify tax exempt authorization when making business purchases in-store.

When making college purchases:

- Notify the teller that the order is tax exempt
- When prompted for a telephone # use 507-222-4000
- Sign to verify that you are purchasing tax exempt on behalf of the college

Carleton’s tax-exempt status applies only to business expenses paid with a Carleton issued purchasing card. It does not extend to individuals making payment on behalf of the college with personal funds. Please note that our preferred vendor for office supplies is Innovative Office Solutions, which is a local woman owned business.
Newspaper/Media Subscriptions at Gould Library

As you prepare for the new school year, check with the Gould Library for your newspaper and media subscriptions. In all circumstances, we highly encourage electronic (paperless) subscriptions as they are less expensive and align with our campus green initiatives. Below is a list of digital publications available to Carleton employees:

Subscriptions verified by Carleton IP address (on campus access or Carleton VPN):

Subscription requiring registration while on Campus:

Access to Articles:
Applying for a new credit card has transitioned to an online process. Eligible employees can initiate a request for a card using the following steps:

**Step 1: Cardholder**
- Open the [Purchasing Card Application](#) and confirm your eligibility to request a card
- Enter your department approver’s email address into the field and click “Submit”

**Step 2: Approver**
- A notification is sent to your approver to complete the application fields and approve your request for a card. Approver’s must supply the following information:
  - Approver/ Reconciler Assignments
  - Monthly/Single Transaction Limits
  - General Ledger Purchasing Card Defaults

**Step 3: Business Office**
- Approved forms are sent to the Business Office for final review. A purchasing card will be requested from Wells Fargo and will arrive at the Business Office in 3-5 business days.
- An email invitation will be sent to the Cardholder to complete an online tutorial and sign the Cardholder Agreement Form. New cards will be forwarded upon completion of the tutorial.

Please contact Kara Lloyd or Randie Johnson with any questions!

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**Purchasing Card Audits**

Cardholders may have noticed a change to their Purchasing Card experience as the Business Office is now utilizing rules-based transaction auditing techniques to review expenditures charged to Carleton purchasing cards, reported as out of pocket expenditures and/or submitted to accounts payable for reimbursement. In the past we have randomly selected individual cardholders for audit. Rules based auditing may raise new questions about transactions that were not audited in the past but helps us ensure that all cardholders and departments are referencing college policies in a consistent and equitable manner. Thank you for your patience as we explore these transactions more carefully together.

Our auditing process is supported by Card Integrity services.