With the merger of administrative operations between Wright Center and IDAS, we have consolidated most daily functions, such as purchasing, travel and events, with the help of IDAS based personnel. Monthly activities, such as the financial reporting of grant and other funds will be performed by Erin Nocon (eanocon@vcu.edu / 828-5199).

**PURCHASING – Outside Vendors (purchase orders, p-card transactions)**

1. All purchasing requests to outside vendors begin with the completion of the internal Order Form/Service Request. The REDCap form, which is located on-line at [https://cctr.vcu.edu/staff-resources](https://cctr.vcu.edu/staff-resources) - “Purchase Order”

2. The Order Form may be completed by the purchaser or a designee, such as a research assistant. Information about the purchaser (name, area, etc.), the product to be ordered, the vendor, and payment information (VCU index) should be included.

   If completed by a designee, the email address of the Index Owner must be included (last section). This will allow REDCap to route an approval email to the Index Owner. This approval serves as audit documentation, which is particularly important for items purchased with grant funds.

   If the expenditure request is being made for participant recruitment advertising, please be prepared to confirm whether or not your study has been approved by the VCU Treasury Office to make participant payments.

   Also, be sure to upload any other relevant supporting documentation for your purchase request, such as vendor quotes, sole source docs, etc… REDCap serves as the “permanent filing cabinet” (as opposed to an individual’s email account) for purchasing documentation as well as audit documentation.

3. Once all information is successfully collected and authorized in REDCap by the requestor, the Business Office will receive a confirmation notification from REDCap. It will be from that notification that she will initiate the purchase, either by way of a VCU purchase order or a VCU p-card.

4. If the vendor is an internal service provider, such as MBSC Supply Core, Clinical Research Services, CARI MRI, or other internal service provider who create invoices, it would not be necessary to submit a CCTR Order Form via REDCap. But it would be your responsibility to ensure the administrative office has copies of the appropriate source documentation for your charges for purposes of reconciliation.

Primary Contacts:  Hayley Darwin  
Deon Hamner  
Emma Freeman (participant liaison)  
Erin Nocon (Alternate)  
cctrbiz@vcu.edu  
804.828.3793 – Main Number
To help purchasers know what information may need to be provided as documentation for their requests, below is information related to different types of purchases and the documentation typically required for successful submission to Procurement. Please contact the Business Office at cctrbiz@vcu.edu for additional information or assistance with specialized requests.

Types of items for purchase

1. **General supply items under $2,500**
   - Eligible for purchase via departmental p-card
   - Typically, no other additional documentation is required other than vendor and item information.

2. **General supply items over $2,500**
   - Typically treated as a “demand payment” when competition may not be practical or available for certain goods or services. Purchase order initiated by department upon receipt of quote or invoice.
   - Note if the item has vendor terms/conditions or a service agreement for signature, it must be treated as a contract purchase (see #3).

3. **Other goods and services over $2,500 – Contract Purchases**
   - Documentation typically required for the department to initiate the purchase order include:
     - Vendor quote (not invoice) for goods/services requested
     - Vendor’s terms and conditions associated with the purchase. T/C typically detail payment, warranties, confidentiality, governing law, etc. It also states what VCU is entitled to do or not do with the vendor’s product and what the vendor is entitled to do as well. If there are none, then VCU will substitute their own standardized template that protects the university and purchaser.
     - Additional documentation may be required if the item is specialized technology that will handle confidential and/or regulated Category I/II University information (see #4). This guarantees that all systems meet the university’s requirements to protect in accordance with federal, state and industry regulations and/or other civil statutes where if lost may require breach notification and cause potential regulatory sanctions, fines and damages to the university’s mission and reputation (confidential and regulated data).

1. **Category I** information is defined as “information protected under federal, state or industry regulations and/or other civil statutes, where if lost may require breach notification and cause potential regulatory sanctions, fines and damages to the institution’s mission and reputation.”

2. **Category II** information is defined at “all proprietary information that if improperly released has the potential to cause harm to the institution, its mission or its reputation, but do not require breach notifications, and security or privacy of such data is not regulated or required by law or contract. Such data includes proprietary and properly de-identified research information, business related email or other communication records, financial information, employee performance records, operational documentations, contractual information, intellectual property, internal memorandums, salary information, and all other information releasable in accordance with the Virginia Freedom of Information Act (Code of Virginia 2.2-3700). (Sensitive data)
3. For more information about data classification, please go to [https://itgovernance.vcu.edu/security/](https://itgovernance.vcu.edu/security/)

4. Specialized technology, including software, that will handle confidential and/or regulated university (Category I) information:
   a. If the purchase is a service or product that will collect, process, transmit, store, or otherwise handle University information or create, access, process, or manage University information on behalf of VCU, then purchase qualifies as a third party IT purchase, and the [IT Governance Data Classification form](https://itgovernance.vcu.edu) must be completed to initiate a risk assessment process.
   b. If all documentation is in order, turnaround time with the IT Governance can take around 7-10 days on average.

5. Items costing $10,000 - $100,000
   a. Must be placed on competitive bid, or [Sole Source Justification](https://itgovernance.vcu.edu) provided
   b. Vendor quote (not invoice) detailing the item(s) to be purchased

Please note that individual faculty and staff should not sign documents or agreements with vendors as they may contain legally binding terms and conditions to which the university may not legally be able to honor (such as indemnification). If your signature is on such a document, you may be held personally liable.

The documentation listed above may be uploaded as part of your REDCap purchasing request submission or you may request assistance from the department business office at cctrbiz@vcu.edu.
EVENTS

1. Center or Institute events are to be coordinated through our administrative office. This ensures all public relations, room reservations, catering, etc. needs are centrally managed.

2. Those planning events requiring Center or Institute resources are to submit their event planning needs TWO WEEKS PRIOR to the event by the completion of an Events Planning Form, which is a REDCap form located at https://cctr.vcu.edu/staff-resources - Events.

3. The Events form should be completed with event information, contact information, attendee information, location needs, PR/marketing needs and if food is needed. You also have the ability to upload to flyers or other relevant documentation.

4. Please be aware that any food (catered meals, etc.) is subject to VCU policy and subject to approval by Dr. Moeller. Alcohol is subject to stricter policies and regulations.

5. It is the responsibility of the event holder to follow up with the event coordinators to confirm the number of attendees 24 hours prior to the event to ensure any food order is correct or requires modification prior to delivery. This helps minimize waste and over-ordering.

Primary Contact: Hayley Darwin
Deon Hamner
Emma Freeman (participant liaison)
Erin Nocon (Alternate)
cctrbiz@vcu.edu
804.828.3793 – Main Number
Events Promotion Guide

Use this guide after your Wright Center event has been approved and scheduled. (Fill out the REDCAP Event Planning Form for approval and funding, if applicable.)

Step 1: Set up your events management system (i.e., how you’ll manage registration) and make registration live. Some options include: REDCap, training.vcu.edu, Google Forms, Zoom registration.

- Use the correct Wright Center logo at the top, if possible. A photo of your speaker is great, too, if possible.
- Send any language to your communications person if you want it reviewed before you post.
- **Everything someone needs to know about your event should be on the registration page.**

(An exception to this would be a ‘save the date’-type promotion, before registration is live, for a Wright-run conference. Talk to your communications person about that, if applicable.)

Step 2: **Send the URL of the live registration page to your communications person.** Plus: a photo of the speaker, if applicable. Let your communications person know who the audience is. Then answer any questions he or she has about the event in a timely manner.

An event with no registration required is not recommended, as it’s important to collect statistics for grant reporting purposes and email addresses for communications purposes. But in the rare case where it’s necessary, send the important information about the event (when, where, who, what, audience) to your communications person, and state that no registration is required, as we will want to incorporate that into the promotion.

Your communications person will make sure the event gets on: VCU Events, TelegRam, newsletter(s) and social media.

Other ways your communications person can help:

- **getting the event to non-Wright newsletters and social media channels (like VCU Health’s massmail, OVPRI newsletters, VCU main social accounts)**
- discussing the best events management system for your event
- the creation of a graphic or image for the event, especially if it’s a series
- help finding the right Wright Center or other VCU logo
- the creation of a slide for digital signage around campus
- the creation of a physical flyer for hanging around campus
- external-to-VCU marketing ideas
- potentially attending the event to write about it and/or take photos

Tips:

- If possible, avoid having an event where someone needs to email someone to register.
- Per VCU policy, don’t post video links (Zoom, etc.) publicly online. Use a registration mechanism to email attendees the link.
- Don’t create a document about the event for online posting. The event’s “home base” should be a website itself, rather than a pdf, Word doc, slide, or Google doc linked on a website.
- Please don’t use any VCU logos in an **unauthorized way.**
After the event: Send the email addresses of those who signed up to your communications person. They will be added to the Wright Center newsletter. (There’s automatic de-duping, so no one should get the emails twice. And they can easily unsubscribe if it’s not for them.) This is how we grow our reach, impact and brand as a CTSA hub at VCU and beyond.

At this time, please continue to follow procedures put into place during Jackie Kruszewski’s maternity leave.

Interim Contact: Lillie Lattimore
llattim@vcu.edu
804.628.5414
TRAVEL – using VCU funds

1. All travel for VCU business begins with the completion of a CCTR Request form prior to the trip taking place or expenses associated with the trip are incurred. This is a REDCap form also located at https://cctr.vcu.edu/staff-resources - “Travel Request”. The purpose of this form is for our travel coordinators to collect all needed information in one place before they proceed with making your travel arrangements via Chrome River and Christopherson Business Travel Services. Otherwise, your presence would be required as they made your travel arrangements.

Information needed for travel planning includes purpose of trip (conference, research collaboration, etc.), index to be used to pay for the trip, travel destination, travel dates, transportation needs (train, plane, etc.) using the VCU-issued departmental credit card.

By working with the departmental business office in advance of the trip, this ensures that all expenses adhere to VCU policy and the traveler will be not surprised by any expenses that do not qualify for reimbursement from VCU held funds.

2. For the If the travel is to be paid by the traveler’s grant index, the traveler may use their supervisor as the approver. If the travel is to be paid from Center/Institute funds, either CCTR or IDAS, the travel must be approved by Dr. Moeller.

3. To ensure continuity of services, all CCTR and IDAS faculty and staff who travel for university business should select Hayley Darwin, Deon Hamner and Erin Nocon (back up) as their travel delegates in Chrome River and Christopherson applications.

4. Travelers are encouraged to submit their plans as far in advance as possible to ensure best prices for plane tickets and early bird registrations. However, please understand that travel requests submitted at the last minute (e.g., less than three days before departure) may not be able to be accommodated.

5. Once travel requests are received and approved, the assigned travel coordinator will work with the traveler to make the needed arrangements and submit the appropriate Chrome River travel authorization (before the trip occurs) and Chrome River travel reimbursement (after the trip occurs).

6. Please note that if the traveler is a guest (individual not employed by VCU), the same policies will apply if a VCU index is paying for the travel.

7. It is important to note that some travel expenses can be paid in advance using a departmental p-card (e.g., airfare and meeting registration fees). But expenses subject to state limits (e.g., lodging and meals) are not allowable on a departmental p-card. So, travelers must be prepared to use their own credit card for those expenses and file for reimbursement upon return from their trip. If the traveler does not have a credit card, a traveler may be eligible for a travel advance (certain restrictions apply) to assist with those expenses while in travel status.

Primary Contact: Hayley Darwin
Deon Hamner
Emma Freeman (participant liaison)
Erin Nocon (Alternate)
cctrbiz@vcu.edu
804.828.3793 – Main Number

Updated: Summer 2023
**Request to Hire (Post Vacant Position)**

1. All requests to post a vacant position or create a new position begin with the submission of job information for the requested position. The REDCap form, which is located on-line at [https://cctr.vcu.edu/staff-resources - “Human Resources: Request to Recruit/Post Position”](https://cctr.vcu.edu/staff-resources - “Human Resources: Request to Recruit/Post Position”)

   However, we encourage you to discuss your hiring needs with Administration before submission of this form as all new positions are approved based on budgetary needs and availability.

   Please know this process also includes affiliate appointments, as well as volunteers and visitors who will be part of the research clinic operations. This is because these positions are considered to be “sensitive” and require a different type of criminal background checks if they will be in close proximity to research participants, children, etc.

2. When completing the on-line form, please provide the following information:
   a. supervisor information
   b. index information (how position will be funded and for how long)
   c. basic position information (faculty, staff, new position, replacing current employee, etc.)
   d. position needs (new computer, new phone line, office location, etc.) that will need to be purchased and/or provided
   e. who will responsible for first day orientation

3. Once received, Elizabeth Fortune will ask to meet with the supervisor to walk through the recruitment/hiring process.

   **Primary Contact:** VACANT/TBD - Primary
   804.827.1527

   Elizabeth Fortune – Alternate
efortune@vcu.edu
   804.827.1936