



VCU

C. Kenneth and Dianne Wright Center
for Clinical and Translational Research

Administrative Operations Manual

Table of Contents

1. Purchasing
2. Specialized Purchases
3. Travel (using VCU funds)
4. HR Actions/Hiring
5. Events
6. How to Promote Your Event



VCU C. Kenneth and Dianne Wright Center for Clinical and Translational Research

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> - “Purchase Order”. This link is always available in the footer of all Wright Center webpages (cctr.vcu.edu).
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
Joseph Carlisle
Niya Grant (participant liaison)
Erin Nocon (Alternate)
cctrbiz@vcu.edu | 804.828.3793 – Main Number



VCU C. Kenneth and Dianne Wright Center for Clinical and Translational Research

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
 - a. Eligible for purchase via departmental p-card
 - b. Typically, no other additional documentation is required other than vendor and item information.
2. General supply items over \$2,500 +
 - a. 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.
 - b. 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
 - a. Documentation typically required for the department to initiate the purchase order include:
 - i. Vendor quote (not invoice) for goods/services requested
 - ii. 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.
 - iii. 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/>



VCU C. Kenneth and Dianne Wright Center for Clinical and Translational Research

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 Review](#) 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](#) 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.



VCU C. Kenneth and Dianne Wright Center for Clinical and Translational Research

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”. This link is always available in the footer of all [Wright Center webpages](#).

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 Collegiate Travel Planners. 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.

Please complete all the information in the Travel REDCap form so the business office may make your travel arrangements. Any fields marked "TBD" will mean the business office cannot act upon your request, making you responsible for making your own arrangements in the VCU Chrome River and CTP systems (access available through my.vcu.edu).

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 department business officers (Hayley and Joseph) as their travel delegates in Chrome River and CBT applications. Otherwise, they will not be able to arrange travel on your behalf.
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 one week 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
Joseph Carlisle
Niya Grant (participant liaison)
Erin Nocon (Alternate)
cctrbiz@vcu.edu | 804.828.3793 – Main Number



VCU C. Kenneth and Dianne Wright Center for Clinical and Translational Research

Request to Hire/HR Actions

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://ctr.vcu.edu/staff-resources> - “*Human Resources: Request to Recruit/Post Position*”. This link is always available in the footer of all [Wright Center webpages](#)

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, Brandon Seigel may ask to meet with the supervisor to walk through the recruitment/hiring process.
4. This REDCap form is also used to appoint affiliate faculty, student workers and research volunteers. Please follow the instructions in the REDCap to upload the appropriate documents where requested.
5. For other HR actions, such as pay actions and position reclassifications, please contact Brandon Seigel directly for more information.

Primary Contact: Brandon Seigel - Primary
seigelb@vcu.edu
804.827.1527

Elizabeth Fortune – Alternate
efortune@vcu.edu
804.827.1936



VCU C. Kenneth and Dianne Wright Center for Clinical and Translational Research

EVENTS

This form is used instead of the Purchasing REDCap form when there is an event that requires multiple arrangements to be managed by administration. This includes meals, room reservations, parking, marketing, etc.

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://ctr.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 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. The event requestor/host will serve as the point of contact for the caterer and any other vendors involved in the event (as opposed to the business office).
6. It is the responsibility of the event requestor/host to follow up with the caterer 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
Joseph Carlisle
Niya Grant (participant liaison)
Erin Nocon (Alternate)
cctrbiz@vcu.edu | 804.828.3793 – Main Number



VCU C. Kenneth and Dianne Wright Center for Clinical and Translational Research

How to Promote Your Event

This is a guide to outline the steps to take during the planning and finalization of your event.

Note: Please allow enough time during your planning phase and before the event takes place. Different platforms have deadlines to submit your event information and we want to ensure that we have time to properly advertise your event and adhere to all deadlines for submission. Thank you!

Webpage Carousel

Due to recent changes in the VCU web application, the webpage carousel is no longer available. Instead, we plan to use the Center's blog feature, current news and calendar features and social media for special events, activities and initiatives.

Wright Regional Newsletter

When you have an event that needs to be promoted in the bi-weekly Wright Center newsletter, please note the time of newsletter distribution in the [Wright Center Newsletter Schedule](#). This schedule has also been posted in the [TOG Slack channel](#). *This schedule is updated as needed.*

1. Please make your request at least one week in advance so that the person in charge of creating the newsletter can have your event on their docket.
2. When submitting your request, please include the event title, time, location, speaker (with credentials) and a short description of the event. Limit to 95 words, 700 characters, if possible. If the submission is significantly long, it will be edited. If you need a graphic for this event, please notify Lillie Lattimore (llattimore@vcu.edu).
3. If you need to make changes to your event, please contact Lillie as soon as possible with the updated information.

VCU Telegram

At this time, individual modules are responsible for submitting their own events to the VCU TelegRAM.

When submitting your event to TelegRAM, please note that the submission deadline is **9 a.m. two business days before publication**.

1. Go to telegram.vcu.edu and click "Submit a message."
2. Select the Event tab and enter all needed information to publicize your event. A vcu.edu email, phone number or website for readers seeking information should be included in the description.
 - a. The suggested format is: **Name of VCU organization** sponsors/holds/presents a **name of event** at **location**. [Brief description or additional information can go here if you wish.]
 - b. Please also note that there is a word/character limit for the description, but it isn't specified on the website. The limit is around 94 words, 407 characters (no spaces) or 500 characters (with spaces).
3. You can choose up to two publish dates for when you would like your event to run. It is published at the discretion of University Public Affairs.



VCU C. Kenneth and Dianne Wright Center for Clinical and Translational Research

VCU Events Calendar

At this time, individual modules are responsible for submitting their own events to the VCU Events Calendar.

Submitting your event to the VCU Events Calendar is easy and it posts on the website fairly quickly.

1. Go to events.vcu.edu and click “Submit an event” at the top right of the screen. You will be directed to the VCU Calendar Management dashboard. Click the “Create a New Event” button to submit your event.
2. Once on the VCU Calendar Edit / Update screen, check the box next to Advanced Edit.
3. Enter all information for the event in the given fields. If you have an image, upload and then enter the alternate text (text describing the image).
4. Under the “Sponsor” section, select the Office of Research for School/Unit and Wright Center for Dept.
5. Under the “Related Information” section, in the Primary Category, click the box and a second dialog box will appear. Please select “Research” for the primary category. *This enables the Wright Center website to pull from the VCU calendar and showcase your event on our website’s calendar.*
6. In the Secondary Category, click the box and a second dialog box will appear. Please select up to three subcategories that relate to your event.
7. Under the “Related Links” section, enter the text “Register” under Link/Text Title and the registration link under URL.

VCU Health Intranet

For VCU Health Intranet, please note that events must be VCU Health related and should only be submitted once at a **minimum of two weeks prior** to the event.

If you have a vcuhealth.org email address, you should be able to access the VCU Health Intranet and post events and news. The specific instructions for sharing news and events on the intranet can be found here: [Share Your News and Events](#). If you don’t have a vcuhealth.org account, please submit the content you want featured to Lillie Lattimore (lllattimore@vcu.edu) at least **three weeks prior to the event** to allow enough time for submission.

Submissions must include:

- A title or headline
- Content that shares
 - Useful information you want others to know about
 - Relevant links to more information and registration
 - Contact information (name, phone number and email address)
 - A one sentence description summarizing what a team member should do with the information provided in the submission. **Example:** Join us for a one-hour course on managing a multidisciplinary research team.
 - Date, time and location of the event
 - If you submit a photo, it should be no larger than 2-3 MB. Photos of people require a signed consent form to be on file. If you need a stock photo or Canva design, please inform Lillie Lattimore of this when you submit your event for posting.



School of Medicine and Monroe Park Campus Axis TVs (Digital Signage)

At this time, individual modules are responsible for submitting their own events for VCU digital signage displays.

In order to advertise your event on the TVs around campus, you will need to submit a request to VCU IT. You will need to **submit your request 10 - 14 days in advance**. The digital signage slides are formatted in 16:9 ratio (see image below for example). Please note that the slide is displayed for approximately 9 seconds, so please include the details: what, when, where, and a web address for additional info.



To request digital signage, please follow these steps:

1. Log into the [online support ticket system](#).
2. Select New IT Support ticket
3. Select Communication & Collaboration
4. Select Marketing, and then Digital Signage.
5. Select "Request Digital Signage." It will pull up the request screen. Enter your request for digital signage and include the calendar duration for each slide. Please list where you would like your slides to be featured. **See example of a request below:**

I would like to request digital signage to advertise the Wright Center's 3rd Annual Research Symposium on May 4, 10 AM- 4 PM.

Could I have the dates of circulation go from March 17 to May 1, 2023. Could I request that the axis tvs in Kontos Medical Sciences Building, Sanger Hall, Molecular Medicine Research Building, College of Health Professions Building, and Egyptian Building show the attached signage?

Contact email: llattimore@vcu.edu

Contact number: 804-628-5414



VCU C. Kenneth and Dianne Wright Center for Clinical and Translational Research

6. Attach the slide in jpeg format. Save request and submit.

CTSA Coordinating Center (CCOS)

The CCOS website is still a work in progress. As of right now, we are **not** able to submit news and events for publication on the site via a form. In the interim, we will need to submit any content we want featured to communications@ccos.ctsa.io. CCOS will only receive/accept email from a pre-selected list of “communicators”. Please follow the directions for submission below:

1. As soon as your event has been approved, scheduled, and has a registration link, please submit information you would like advertised to Lillie Lattimore (llattimore@vcu.edu).
2. The following items are needed to submit to CCOS:
 - a. Event title
 - b. Description
 - c. Time
 - d. Presenter/Speaker and their credentials
 - e. Point of contact for questions and more information
 - f. Image, if needed. **Note:** Please consult with us (Lillie or Liz) if you need assistance with creating/designing a graphic for your event.

EVMS Website/Listserv

TBD

ODU Website/Listserv

TBD

VSU Website/Listserv

Please send your event that you want advertised to VSU students, faculty and staff to Lillie Lattimore (llattimore@vcu.edu) at least **two weeks prior to the event**.

Primary Contact: Lillie Lattimore
llattimore@vcu.edu
804.628.5414