UNIVERSITY OF
South Carolina
Arnold School of Public Health

Contents

This document is best viewed electronically as a PDF to get full use of the hyperlinks throughout the document.

If there are any topics not yet covered in this document, please reach out to Claire Fisher, ASPH Research Lab Coordinator, at cr32@mailbox.sc.edu with any suggestions.

Helpful Link Directory

The Arnold School's administrative departments are organized into the following main areas:

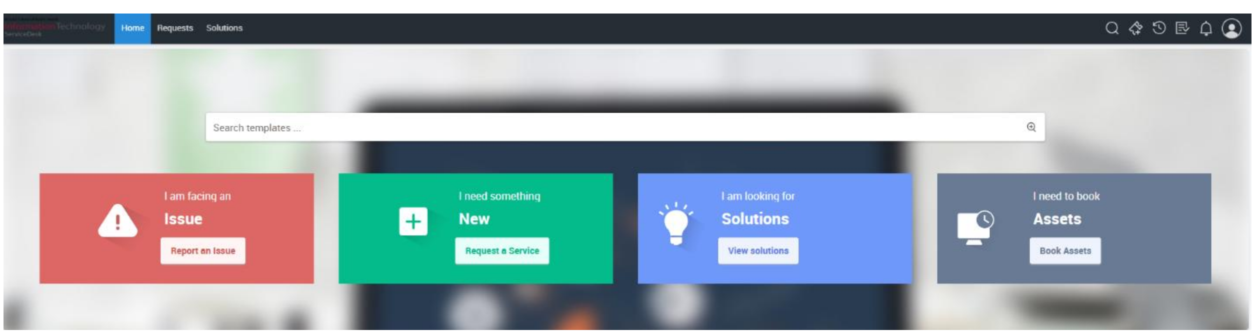
- Office of the Dean
- Office of Clinical Public Health
- Office of Faculty Affairs
- Office of Operations and Accreditation
- Office of Research
    - The Arnold School Office of Research provides several services to assist Arnold School faculty, staff, students, and their research partners with activities related to increasing research productivity/grant setup and management for the School. More information about those research support services can be found here.
- Office of Access and Collective Engagement
- Office of Undergraduate Student Affairs
- Office of Graduate Student Services

A collection of Policies and Forms for the School can be found here

Information Technology (IT) Support

The Arnold School Information Technology Core provides IT support for faculty and administrative staff within the school. In addition, they also provide support for research grant IT and maintain computer labs within the school.

Need IT support? Click here to submit a ticket to IT for any issues or questions. To log in, use your USC credentials.



Setting up a new lab with Environmental Health and Safety (EH&S)

- Notify EH&S of your new lab
  - Fill out the new lab startup form with Environmental Health and Safety (EH&S) (click here) and email to Jocelyn Locke (jlocke@mailbox.sc.edu). If your research involves the use of biological materials copy Sherika Smith (smith69@mailbox.sc.edu) as well.
- Create a chemical inventory
  - EH&S requires each lab to maintain an up-to-date chemical inventory following this template. You can send this excel spread sheet to Adam Roberge in EH&S (aroberge@mailbox.sc.edu) letting him know that you are a new lab.
  - This inventory will be uploaded into the Campus Optics Inventory System (by EH&S). A designated lab member or PI will be able to access this and maintain an up-to-date inventory. More details will be provided by Adam Roberge once the template is emailed to him.
- Sign up for applicable lab training
  - These trainings are required for all researchers in the lab as well as the PI (click here). Additionally, each training course has a varying length of time that they are good for. The completion certificates from each training must be kept either in a physical or electronic form and be readily available. In addition to the completion certificates, it is recommended to keep a log of researchers' dates when each training was completed to ensure no trainings lapse.
- Create a Laboratory Hazard Notice signage for the lab
  - A Laboratory Hazard Notice is required to be posted at each entrance of your lab. This is used to inform emergency responders, lab personnel, and authorized visitors of all the hazardous materials/situations that they might encounter when entering your lab.
  - Click here for an editable template of the Laboratory Hazard Notice and for any other additional details.

    Note: If working with Biosafety Level 2 substances an additional lab door signage is required and can be found here

Yearly safety inspections performed by EH&S

- Lab safety inspections are performed annually for all research labs. Generally, all lab inspections for each building are performed within the same month. Either the PI or lab safety officer will be contacted to schedule a time to walk the members of EH&S through the lab spaces. For more details from the EH&S website click here
- To prepare for the yearly inspection, it is recommended to look over the checklists made available by EH&S here. In addition, the following paperwork should be available and up to date for yearly inspections. It is recommended to keep them organized in the following binders to expedite the inspection process:
    - Chemical and Lab Safety:
        i. USC General Lab Safety Manual and Chemical Hygiene Plan (General LSM-CHP)
        ii. Lab-specific LSM-CHP
        Note: This document should be updated to be specific for each research lab
        iii. If applicable: include training certificates from Chemical & Lab Safety and Hazardous Waste trainings here
        iv. Standard Operating Procedures (SOPs) for High Hazard Chemicals and Processes (EH&S template)
        For more information on SOPs click here
    - Chemical Inventory and SDS Binder:
        i. Printed version of the most up to date chemical inventory following the template provided by EH&S
        ii. To maintain Safety Data Sheets that are easily accessible a few options are available:
            1. When a chemical is added to your inventory in the Campus Optics platform, an SDS for that chemical is automatically added if all of the following are entered: chemical name, CAS #, and manufacturer. If CAS# and/or manufacturer information is missing, the SDS will not be loaded. In such cases, you will need to manually upload a pdf file of the SDSs.
            2. Maintain printed copies of SDS for ALL chemicals stored and/or used in the lab in a binder.

3. Maintain printed SDS for high hazard chemicals only. Maintain electronic access to SDS for all other low to moderate hazard chemicals.
    a. *In general, high hazard chemicals are classified into Category 1 or 2 based on the Globally Harmonized System for hazard classification and labeling of chemicals for the following hazard classes:*
    b. *Acute Toxicity, Carcinogen, Mutagenicity, Reproductive Toxicity, Respiratory Sensitizer, Target Organ Toxicity, Aspiration Toxicity, Pyrophorics, Flammables (liquids; if used in large amounts or in combination with heat or open flame), Flammables (gases), Emits Flammable Gas, Self-reactives, Self-heating, Organic Peroxides, Skin Corrosion or Burns, Eye Damage, Explosives and Oxidizers.*

- Biosafety Binder (if applicable):
    i. USC General Biological Safety Manual
    ii. Lab specific Biological Safety Manual
    Note: This document should be updated to be specific for each research lab
    iii. USC Protocol for Post-Exposure Evaluation and Follow-Up
    iv. Biological Spill Procedures
    v. Standard Operating Procedures (SOPs) for High Hazard Chemicals and Processes that include BSL2 materials (EH&S template)
    For more information on SOPs click here

Research Cores at USC

Research cores at the University of South Carolina are shared research resources that provide access to equipment, instruments, technology and specialized expertise. These services and facilities are available to researchers from any part of the university or from other organizations. When researchers engage the services of one of our research core facilities, they don't just get access to the equipment or consultant services they need to realize their scholarly vision, they gain a partner to support crucial steps in their research process.

USC's research cores have traditionally been established in and managed by a wide range of academic units. Today, the university is working to streamline and enhance the efficiency of our shared research facilities by consolidating many USC cores into a centralized and integrated system. Centralization allows USC's research cores to

- Offer a single user-friendly interface for essential functions like scheduling, billing and reporting.
- Evaluate new technologies based on user need and efficiently secure new instruments or upgrades without duplication or gaps.
- Receive centralized administrative support to ensure smooth operations, allowing core staff to focus on research support.

More details pertaining to the USC Research Cores including a comprehensive equipment list can be found here.

If you are interested in listing a piece of your lab's equipment as a Core instrument, please contact Bob Price (bob.price@uscmed.sc.edu) and Savannah Britz (savannah.britz@sc.edu).

Centralized Research Cores

More information about each centralized core can be found below:

- Electron Microscopy Center
- Center for Elemental Mass Spectrometry
- Functional Genomics Core
- Health Care Evaluation Systems and Technology Informatics Archive (HESTIA) Core
- Instrumentation Resource Facility (IRF)
    - Service Areas: Histology, Confocal imaging, Electron Microscopy, Flow Cytometry / Cell sorting, Instrument Training
- Mouse Experimentation and Germ-free Core
- X-Ray Photoelectron Spectroscopy Core

- Biofabrication Core (Coming soon!)

Non-Centralized Research Cores

Many USC research cores have not been centralized under the Office of the Vice President for Research. These cores are distributed among many USC colleges and departments, and they are available for use by USC researchers just like centralized cores. Click here for a list of USC's non-centralized research cores available.

McCausland College of Arts and Sciences Stockroom

This is a self-service stockroom available to all researchers at the University of South Carolina. It is located in the John M. Palms Graduate Science Research Center (GSRC)

Location: 631 Sumter St. GSRC Room 109, Columbia, SC 29208

Hours: M-F from 9 AM – 4:30 PM. *It is closed daily for lunch from 12 PM-1 PM.*

Items such as chemicals, glassware, lab supplies, testing supplies, office supplies and dry ice, and cylinder gases can be purchased from here. Upon entering the stockroom, fill out the provided Stockroom Order Form ensuring it is filled out including the grant number the supplies will be charged to. Once completed, leave the completed form in the submission box and the PI of the lab will later receive a receipt of the purchase(s) in their email.

More information about this stockroom can be found here

Purchasing Supplies

Each academic unit and center is responsible for managing purchasing within its department(s). Please consult your area's lead business manager for guidance on applicable processes and policies. This contact information can be found using the website directory or also below.

Department	Name	Email	Phone
Environmental Health Sciences (ENHS)	Destine Rivers	rivers24@mailbox.sc.edu	803-777-9289
Epidemiology and Biostatistics	Stephanie Kline	sdriver@mailbox.sc.edu	803-777-5876
Exercise Science	This department uses an online portal to order supplies that can be found here. For any additional questions, please contact:		
	Melissa Bair	mattison@mailbox.sc.edu	803-777-5394
Communication Sciences and Disorders Arnold School of Public Health	Carrie Austin	carrieaustin@sc.edu	803-777-2630
Health Promotion, Education, and Behavior Arnold School of Public Health	Wendy Clemmer	wendycc@sc.edu	803-777-1312
Communication Sciences and Disorders	Jessica Purrington	purringJ@mailbox.sc.edu	803-777-4813
Health Service Policy and Management	Dantz Woodberry, BS, MBA	woodbern@mailbox.sc.edu	803-576-6550

Additionally, each department's business manager can assist with accessing financial/grant information.

P-card Purchasing Shared Service

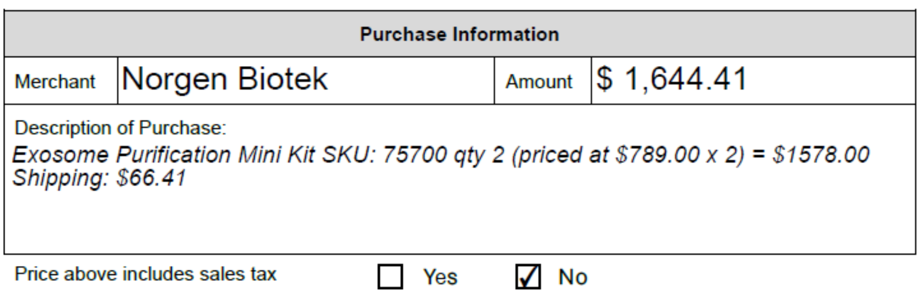
Employees who are unable to obtain or no longer have access to an individual Purchasing Card (P-card) can continue to procured required goods and services through the P-card purchasing shared service.

All purchasing requests using this platform must be submitted between the business hours of 8:00 AM to 5:00 PM M-F. Requests for same day purchases must be submitted before 3:00 PM. The purchasing department team will respond to all requests within two hours during business hours.

More details about this service can be found on the Office of the Controller's Page here.

To request a purchase:

1. Complete the P-Card Purchasing Shared Service Form
   a. Under the Purchase Information Header, it is recommended to be as descriptive as possible for what items the purchase contains. This would include individual item price and catalog number. See example picture below:

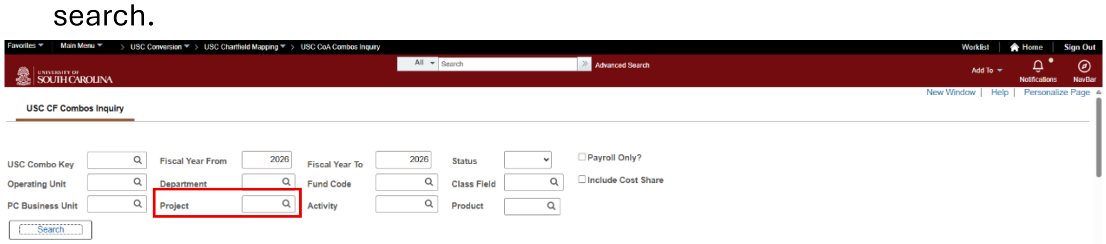


Purchase Information			
Merchant	Norgen Biotek	Amount	$ 1,644.41

Description of Purchase:
Exosome Purification Mini Kit SKU: 75700 qty 2 (priced at $789.00 x 2) = $1578.00
Shipping: $66.41

Price above includes sales tax ☐ Yes ☑ No

   b. To find the chartfield:
      i. Log in to PeopleSoft Finance
      ii. Follow the navigation path below to be directed to the chartfield query page:
         Main menu > USC conversion > USC Chartfield Mapping > USC CoA Combos Inquiring
      iii. Enter in the project/grant number in the designated box and hit search.



        iv. This will pull the chartfield string that is required for filling out this form. It is recommended to copy and paste this table into an excel spreadsheet with all project chartfields to make it more easily accessible in the future.

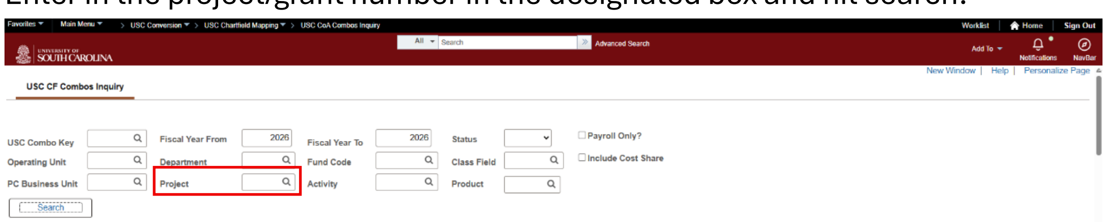
2. Email your filled out form with approvers signatures to pcardpurch@sc.edu.
    a. To find out more about whose signatures are required for each approval, please contact your business manager for your department. The Controller's Office has created a quick reference guide to find this information in People Soft Finance for each department.
    b. If using USCSP funds, only the Principal Investigator (PI) signature is required for the level 1 approver.
3. Participate in a Microsoft teams call to complete the purchase.

Placing a Purchase Requisition

- Purchase requisitions are used to generate Purchase Orders (POs) for contractual services or supplies.
- In general, a purchase requisition is required for all purchases greater than $10,000 however, there are exceptions to certain types of payments. For more information, visit the Controller's office PeopleSoft Payment Request Matrix.
- For purchases worth less than $10,000, a PO is necessary whenever:
  1. Supplier requires a PO to fulfill an order
  2. Department requires a PO for tracking purposes or to maintain terms& conditions associated with the purchase
  3. Assets are being acquired:
     - Defined as any item with a total cost of acquisition per unit greater than or equal to $5,000 (inclusive of tax, shipping, installation, etc.)
     - Controller's Office is the authority for all asset approval and
  4. Radioactive materials are being acquired
  5. Construction-related procurements

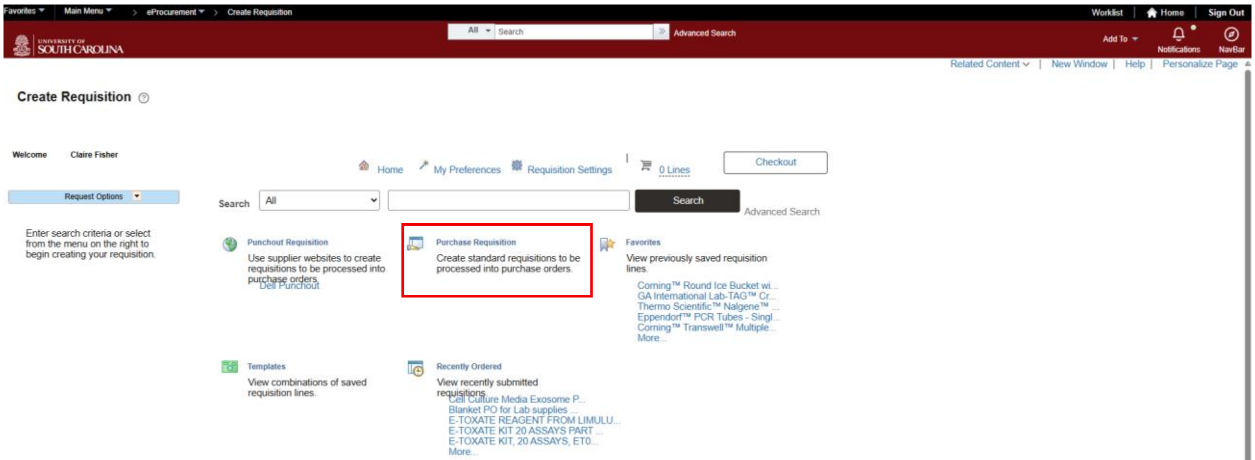
To create a purchase requisition:

a. Obtain a quote of desired supplies/equipment directly from supplier
b. Log in to PeopleSoft Finance
c. Prior to placing the purchase requisition, you will need to access the PeopleSoft Chartfield Strings that will be used identify which grant the PO should be charged to.
    a. This can be accessed using the navigation path:
    Main menu > USC conversion > USC Chartfield Mapping > USC CoA Combos Inquiring
    b. Enter in the project/grant number in the designated box and hit search.

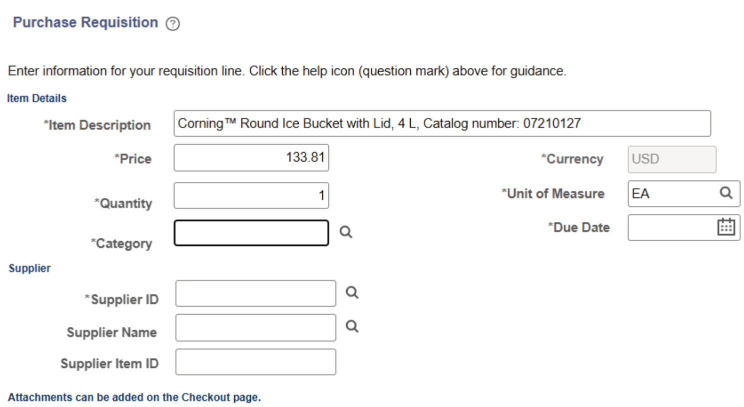


    c. This will pull the chartfield string that is required when placing your PO. It is recommended to copy and paste this table into an excel spreadsheet with all project chartfields to make it more easily accessible.
d. To begin creating a requisition, use the following navigation path:

Main menu > eProcurement > Create Requisition. Click on the "Purchase Requisition" link on this page.

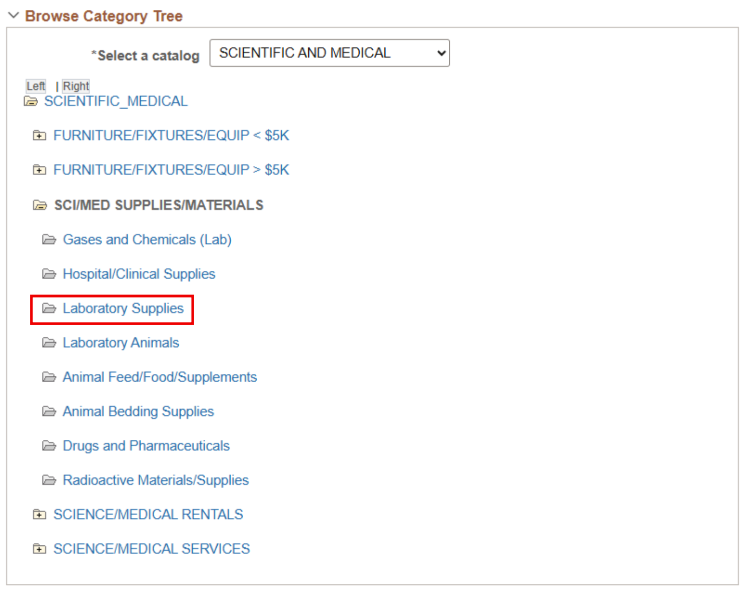


e. In the item description box, include the product name exactly how it is listed on the quote to also include the catalog/product number.
f. In the price field, enter the individual unit price of the item as it appears on the quote.
g. In the quantity field, enter how many of that item is needed.



h. Click the magnifying glass to the right of the category box and click on "Browse Category Tree". This will allow for this requisition to be filed in the correct Category so the proper expense account number is populated, provides spending trend information to the Purchasing Department, and classifies items as capital assets.
    a. A capital asset is defined as an asset that is purchased for greater than $5,000 and has a useful life that exceeds one year. For more details, click here.
i. Under the "select a catalog" drop down menu, find the correct category that best fits this item.

a. For example, to select a Category for a Corning Ice Bucket: SCIENTIFIC AND MEDICAL > SCI/MED SUPPLIES/MATERIALS > Laboratory Supplies. Once Laboratory Supplies is selected, it will populate the category number 490431 in the category box.
It is important to note, do not click the links in all CAPS (such as SCI/MED SUPPLIES/MATERIALS), as these are catalog names. Only select mixed-case descriptions which are the categories at the lowest level.



b. An additional example when purchasing a piece of lab equipment valued at over $5,000: SCIENTIFIC AND MEDICAL > FURNITURE/FIXTURES/EQUIP > $5k > Lab Equipment Unit (Asset). This will populate the category number 49000A in the category box.

j. Use the due date in the item details to indicate either:
   a. The expected delivery date to receive the goods/services
   b. The last effective date of the purchase order – especially for blanket Pos or grant-related procurements that have a finite expiration.

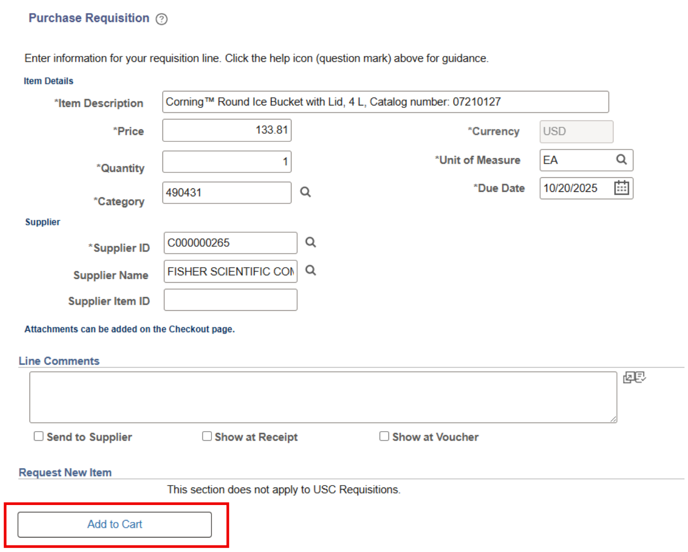
k. Click the magnifying glass next to the “Supplier ID” box and type the name of the supplier (i.e. Fisher Scientific, Thermo Fisher, etc.) and click “Find”

l. This will produce a table below with results that closely relate to your search. Select the correct row for the supplier in which your quote was generated from and ensuring that the address listed in PeopleSoft matches the address on the quote. Once the supplier is selected, it will populate a Supplier ID and Name under the Supplier information.
When a quote is generated from Thermo Fisher, pay close attention to the top right portion of the quote (see picture below) where it says who to make the payment to. In this case, the payment is

made to "Life Technologies Corporation" and this is who should be listed as the _supplier_ *in the purchase requisition, NOT Thermo Fisher.*

Make payment to:
Make payment to:
Life Technologies Corporation.
5781 Van Allen Way Carlsbad,
CA 92008
Contact us:
www.thermofisher.com/
ordersupport
DUNS: 18 215 8873 | UEI
Number: EB8QTC6575E7 |
TIN: 330373077

m. Once all the required (*) fields are filled out, click "Add to Cart" at the bottom of the page. This will add this item to your cart.



Items in your cart do not stay there indefinitely, after a certain amount of time your cart will be cleared and emptied. To avoid this from happening, in the top right corner click on the "Checkout box" and under the Requisition Lines header, check the box to the left of the item and select "Add to Favorites" underneath that. This will add this item to your favorites folder which will save all the previously input information and allows your to add it back into your cart if it has timed out.

n. Once all the lines of the quote have been added to the cart, click the "checkout box" and this will be the final page prior to submitting the purchase requisition.

o. In the top right corner, a name can be given to the purchase requisition, but it is not necessary.

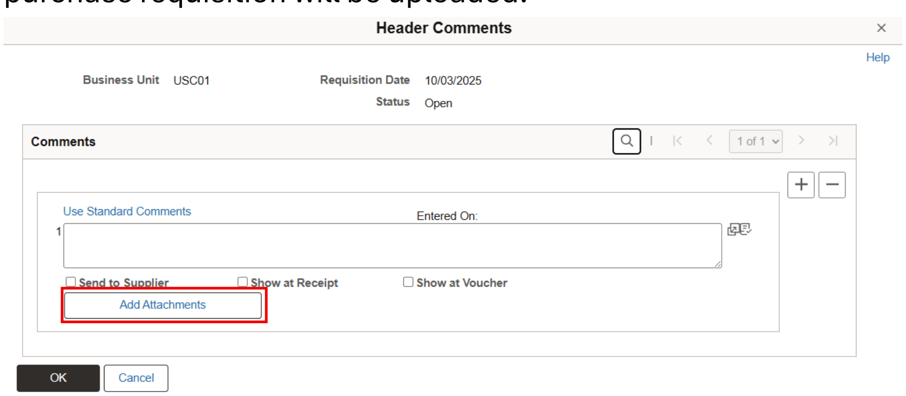
p. Under the Shipping Summary header, this is where a shipping location will be assigned and a project number will be input using the chartfield string acquired earlier in step 3.

    a. Click on "Edit for All Lines"

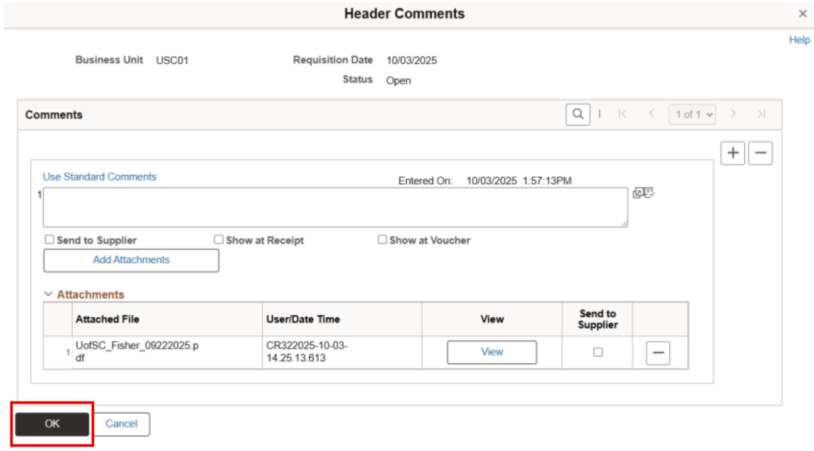
        i. To designate a shipping location the following buildings, have the codes: PHRC 156A, Discovery 230. In the "Ship To Location" box, type the building code followed by the room number. For example, if the goods/services are to be delivered to PHRC room 416, "156A-416" would be put into the ship to box.

ii. Select the expected delivery date for the "Due Date"
iii. In the "Attention" box, type the name of the goods/services receiver.
iv. Under the Accounting Lines header, this is where the chartfield string acquired in step 3 will be used. Here, multiple projects can be listed by assigning what percentage of the final total will be distributed to each project.
    1. The location will be the same as listed in step 16ai.
    2. GL Unit (not listed in chartfield string) will be "USC01".
    3. The Oper Unit, Dept, Fund, Class, PC Bus Unit, Project, and Acitivty can all be found in the chartfield string specific for each project.
    4. Cost Share, Product, and Funding Source can be left empty.
    5. Once all the information is input, select okay and it will prompt how the distribution changes should be applied to each line in the purchase requisition.

q. Under the "Requisition Header Comments and Attachments" towards the right side of the page click "Add more Comments and Attachments" and then click "add attachments". This is where the supplier quote used to generate the purchase requisition will be uploaded.



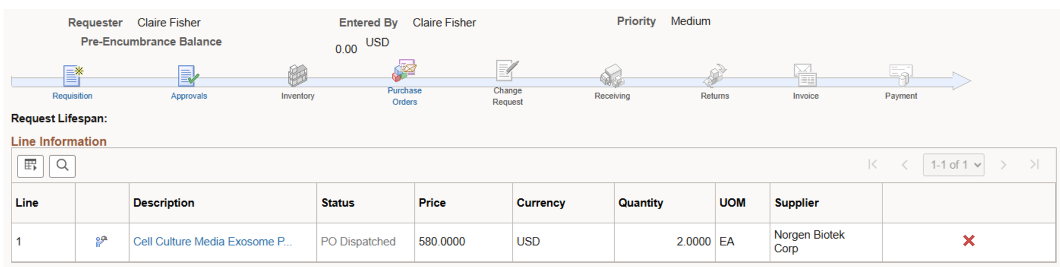
r. Once a file is uploaded, click "OK"



s. Click "Save and Submit".

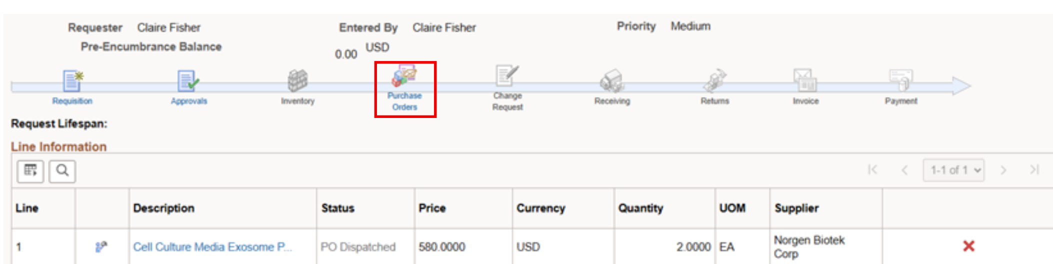
t. To check on the status of the requisition, click on "Manage Requisition" under the eProcurement tab. This will show all of the requisitions placed by the requester (yourself).

u. Select the arrow to the left of the Req ID and a drop down menu will appear showing the status of that particular requisition.



v. Click on "Approvals" to see the current status of the requisition and where it lies in the approval workflow process.

w. Once the requisition is approved and dispatched it will be assigned a PO number, if there are any questions relating to the status of the PO email the buyer in the purchasing department. This information can be found when you click on the "Purchase Orders" icon.



x. Once the supplies from the PO are received, it is critical to mark them as received by following this path "Main menu -> eProcurement -> Receive items". Once here, select the lines of which items were received and click "Receive

Selected" located near the top of the page. This will trigger the payment voucher to be paid out to the vendor.

Blanket Purchase Orders

A Blanket Purchase Order (BPO) can be used for general goods and services, contractual services, supplies and contracts recurring throughout the fiscal year. One BPO can eliminate the need for multiple payment requests and/or purchase orders, thus eliminating repetitive transactions and resources.

To place a blanket PO, follow the same steps in the above section up to step 5:

1. In the item description box, write "Blanket Purchase Order for ____________ (lab supplies, etc.), Effective Dates (use specific term dates) __/__/____ to __/__/____, and authorized users: _____________ (names of personnel placing the orders using the BPO)".
    a. Blanket Purchase Orders generally run the length of the Fiscal year (July 1 to June 30), but the time period can be adjusted to suit the requestor's needs.
    b. BPO's must adhere to the rules and regulations of South Carolina Consolidated Procurement Code. Dollar amounts follow the same rules of other Procurement Methods.
        i. General Procurement < $10,000.00
        ii. State Contract Vendors > $10,000.00
    c. Service agreements, Annual Software Licenses, and University Contracts are NOT Blanket Purchase Orders.
2. For filling out the rest of the requisition, continue at step 8 in the above section *Placing a Purchase Requisition*. One all the sections are filled out, select "Add to Cart" and fill out the remaining boxes as similarly noted in the above section
    a. In the case of creating a BPO requisition, a quote from the vendor is not needed as an attachment.
3. Once submitted, the BPO will move through the same approval process as a normal purchase order until it reaches the purchasing department. Once the BPO is formally approved and dispatched, an email notification will be sent out which contains the BPO number. This usually begins with a "20000-". This is the number that will be entered at the checkout sites for the vendor.
4. Keep track of the total dollar amount spent on the BPO. Once this dollar limit is near, the BPO "closing process" must be initiated by the person who created the blanket PO. To do this:
    a. Mark the BPO as received by following this path "Main menu -> eProcurement -> Receive items". Once here, check the box for the BPO line

and click “Receive Selected” located near the top of the page. This will trigger the payment voucher to be paid out to the vendor.

b. Collect all the invoices that were made with that BPO and send these in a single email to Accounts Payable office at AP@mailbox.sc.edu making sure to include the BPO number in this email.