

Applies to: All OFMD staff

GUIDELINES:

Issued: October 3, 2017

Revised:

PURPOSE:

To define and describe the process of developing and distributing welcome packets for moves at Washington University School of Medicine.

DEFINITIONS:

OFMD – Operations & Facilities Management Department

PM – Project Manager

PROCESS:

For FY 18, the cost of a standard move packet is \$12 per packet.

If it is a Dean-funded project, the standard move packet is required. If it is a department-funded project, the Planner/PM should gain approval from the business manager to include the packets and cost into the project.

The Planner/PM should notify the OFMD Administration Office of the need for welcome packets for an upcoming move at least two weeks prior to the move. If it is a large move (more than fifty people), the Planner/PM should give four weeks' notice.

The Planner/PM should provide the following information:

- Move date and time
- Building name
- Room location(s)
- Number of people moving
- Floor plan with cube/office numbers (preferably with names)
- Project number
- Any special access issues

Once the Administration Office receives the request, they will confirm details of the move with the Planner/PM and will handle logistics of the welcome packets, including development and distribution.

Move packets typically include:

- Welcome letter (these are personalized by the Administration Office for each move)
- OFMD coffee mug with candy inside
- OFMD service guide
- OFMD key fob
- Brochure (as applicable – for large projects only)

- Magnets (as applicable – for large projects only)

The materials for the welcome packets are in G:\Shared\Welcome Packets and G:\Shared\FMD Service Guide\Guide.

Guidelines for accounting:

1. **CREATE INTERNAL WORK ORDER COMMITMENT IN PMWEB:** Planner/PM works with Accountant to do a PMWeb Internal Work Order Commitment for expected welcome packet costs using the Vendor “Internal - WUSM Welcome Packet”.
 - a. Costs are specified in the Welcome Packet Process Guidelines.
 - b. Addition of “Internal - WUSM Welcome Packet” as a Vendor in PMWeb is in progress.
2. **NOTIFY BILLING TO CHARGE PROJECT:** When welcome packets are purchased and completed, the Administration Office should email the amount and project to Departmental Accounting Assistant to bill the project via ID in the accounting system.
3. **PROGRESS INVOICE CREATED IN PMWEB:** When the ID comes to the Capital Projects accountants for payment acceptance on the project, they will enter a Progress Invoice in PMWeb against the Internal Work Order Commitment they created in Step #1.
4. **PROGRESS INVOICE APPROVED IN PMWEB:** The Planner/PM will approve/disapprove the ID via Progress invoice workflow in PMWeb.
5. **ID PAID:** If approved, the Accountant will process the ID in the accounting system.