

MEMO

To: OPR
From: Joyce C. Lopuh
Date: September 2018
Re: General Information

The following information may answer some of your general questions regarding office policies and procedures. Please feel free to contact me with any questions.

| | |
|-----------------------------------|---------------------|
| GENERAL OPR OFFICE NUMBER | 609/258-4870 |
| OPR FAX NUMBER | 609/258-1039 |
| GENERAL CRCW OFFICE NUMBER | 609/258-5894 |
| CRCW FAX NUMBER | 609/258-5804 |
| DONALD E. STOKES LIBRARY | 609/258-5455 |

Administrative Staff

Douglas S. Massey, Director.

Nancy Cannuli, Associate Director.

Cara Carpenito, Academic Assistant to Marta Tienda.

Kristen Cuzzo, Academic Assistant to Noreen Goldman and Brandon Stewart.

Mary Lou Delaney, Program Assistant to Tod Hamilton, Arun Hendi, James Trussell, and Charles Westoff.

Julie Fellouris, Academic Assistant to Patricia Fernandez-Kelly, Douglas Massey, Matt Salganik, Brandon Stewart.

Regina Foglia, Communications Coordinator, Program Assistant, Center for Research on Child Wellbeing, the Future of Children Journal.

Kate Jaeger, Fragile Families Project Director for the Center for Research on Child Wellbeing.

Lynne Johnson, OPR Graduate Program Administrator.

Joyce C. Lopuh, Financial, Publications and Purchasing Administrator.

Kris McDonald, Program Manager, Center for Research on Child Wellbeing.

Tracy Merone, Academic Assistant to Kris McDonald, Jean Grossman, and Sara McLanahan, Center for Research on Child Wellbeing.

Robin Pispecky, Grants Manager.

Valerie Smith, Academic Assistant to Elizabeth M. Armstrong, Kathryn Edin, Thomas Espenshade, Tim Nelson and the Urban Studies Program.

*Please be aware that certain University guidelines are
subject to the discretion of the Office*

Business Expense Policy

Lynne Johnson – Students

Joyce Lopuh – Postdocs, Researchers, Visitors, Administrative, Library and Technical staffs

Tracy Merone – CRCW

Academic Assistants – Faculty

Our business expense, travel and reimbursement policies provide detailed guidance related to reasonable, appropriate, and allowable expenses including expenses charged against sponsored research grants. The expense incurred should be for a valid business purpose to fulfill the mission of the University or funding source.

Please consult the [Business Expense Policy](#), [University Credit Card Policy](#) and the [Travel Policy](#) to determine whether a particular expense is an allowable expense. Concur is the University's tool for managing University-issued credit cards, registering travel requests, and requesting reimbursement for out-of-pocket expenses.

Receipts for all expenditures greater than or equal to \$50 are required. Receipts for expenditures less than \$50 do not need to be attached. However, these expenses will be carefully audited. Receipts should be clear to read. **Do not scan a receipt on top of a receipt.**

If a required receipt has been lost, a missing original receipt affidavit must be submitted. Please access the form library: <https://finance.princeton.edu/form-library/all-forms-a-z/index.xml>

Chart String

The chart string represents how you code a financial transaction. It is composed of key chart fields, specific to the University department, fund and account.

Necessary

An expense is necessary if there is a valid business purpose required to fulfill the mission of the University. The primary benefit of a necessary business expense is the University, not the individual. A necessary expense is a minimum purchase or service required to achieve a valid business objective.

Original Receipt

The original merchant receipt or invoice issued by the supplier or service provider to document and substantiate the business transaction. A digital image of the original receipt is allowable provided that it is legible and the paper receipt is destroyed. Receipts should be clear to read. **Do not scan a receipt on top of a receipt.**

Please feel free to make notations on the receipt prior to uploading.
(example: list lunch attendees and business purpose)

Reasonable Expense

Reasonable means the amount that would normally be spent in a specific situation. An expense is considered reasonable if it is not extreme or excessive and reflects a prudent decision and action to incur the expense. The Business Expense Policy does not define precise dollar amounts for what constitutes reasonable, because the reasonableness of an expense depends upon many relevant factors including the business purpose, the context, the source of funds, and the circumstances surrounding the expenditure.

Substantiation / Justification of Receipts

“Substantiation” describes the set of written documents that support an incurred business expense. Substantiation consists of the Concur Expense Report including original receipts, notation of business purpose, names of persons in attendance (when applicable). Allowable business expenses must be properly and adequately substantiated in order to be paid or reimbursed.

Expense Reimbursement Deadlines

To be reimbursable, business expenses must be properly substantiated and submitted within certain time limitations. These time limitations determine both whether the cost may be reimbursed by the University as a business expense, and whether that reimbursement will be treated as taxable income to the individual.

The University requires reimbursable business expenses be substantiated and submitted to the appropriate department administrator **within 30 days** after the expense is incurred or after the last day of travel. The 30 day time frame allows the department adequate time to submit to the approver, return with questions, forward to a second approver when necessary, then submit to the Office of Finance and Treasury to process payment for their 60 day deadline.

If substantiation occurs more than 60 calendar days after the expenses were incurred or after returning from travel, the expense reimbursement request must include an explanation for the delay. At the discretion of the Vice President for Finance and Treasurer, reimbursement requests beyond the 60-day limit may be approved. In all such cases, the reimbursement may be reported to the IRS as taxable income paid to the individual.

Fiscal Year End Closing

Please submit reimbursement vouchers for expenses prior to May 30th to your appropriate contact person by May 31st.

Expenses incurred from June 1st through June 14th should be submitted by June 15th. Completed vouchers after June 15th should be submitted as soon as possible, no later than June 16th.

PAA reimbursement vouchers should be submitted by May 18th to the appropriate contact person. Joyce circulates a more detailed memo in January with policy, travel and budget guidelines.

It is imperative that you adhere to these dates to allow time to process and ensure that our finances are posted in the correct fiscal year.

Concur Expense and Credit Card Policy

Expenses and travel are substantiated and reimbursed through Concur. Additional details may be found under the Travel Guideline section below.

Concur access: <https://travel.princeton.edu/>

Training modules:

[Travel and Expense Program Introduction](#)

[Manage Your Concur Profile](#)

[Creating a New Expense Report](#)

Graduate Students

Concur is the University's tool for managing reimbursements for out-of-pocket expenses and registering travel requests. Students requesting reimbursement must submit their own requests online through Concur. Neither other students nor staff can submit requests on behalf of another person. Students are not being issued University credit cards at this time.

For additional information please refer to <http://travel.princeton.edu/graduate-students> or <https://travel.princeton.edu/graduate-students/checklist> for international travel and the Travel section below.

Postdocs and Researchers

If approved, University credit cards are financial tools used by authorized individuals to enable certain types of payments while performing University business. Please refer to the [University Credit Card Policy](#) for additional details as well as <http://travel.princeton.edu/faculty-staff>.

Concur Travel and Expense Cards are the primary way to pay for travel and individual business expenses. They are designed and intended to be used to facilitate and support different types of financial transactions. Expenses should support an individual's work that is being performed as part of University responsibilities. These may include expenses such as books, business meals, conference and research travel, and software to support an individual's job duties, teaching, or research.

Approvals and Supporting Documents

Please attach all supporting documents to your first line of your expense. Unfortunately Concur does not have an equivalent field for this purpose. Do not use a separate line for attachments that has a \$0 amount. \$0 cost documentations are deleted after final approval, hence no record keeping will be available.

Required documents may include DGS and graduate school correspondence, conference announcement page and your participation page.

Declined Expenses

Any unapproved or otherwise unallowable expenses transacted with the credit card must be reimbursed to Princeton University in a timely manner.

Computing

Steven Mars, Assistant Systems Administrator, Room 222, (smars@princeton.edu).

Steven will be your first point of contact for computing help. Steven's responsibilities include hardware, software and networking technical support; requests for software/hardware installation; storage media and printer supplies (toner); OPR notebook and projector set-up and reservations.

Wayne Appleton, Systems Administrator, Room 214, (appleton@princeton.edu). Wayne's responsibilities include configuration and purchase of workstations; server maintenance; account set-up on OPR's Unix and Windows systems; and access to shared folders and network resources.

All OPR computer purchases should be authorized and purchased through Wayne to comply with University specifications and licensing. This applies even if you have been awarded funding.

All CRCW computer purchases should be pre-authorized by *Kris McDonald* (kemerson@princeton.edu) before obtaining Wayne's approval.

Please note that computers and computer related expenses need to be requested no later than 4 months prior to the end of your appointment date.

Lynne Johnson, GPA, primary computing responsibilities include maintenance of department listservs and website people page.

Leaving the University

Whether purchased with University funds, endowments, grants or contracts, all equipment and software licenses remain the property of Princeton University. It is presumed that the equipment and licenses will be retained by OPR upon the departure for faculty, staff or students and assigned to a replacement employee or area at OPR. The one exception to the rule is that certain grants or contracts obtained through the University state that the equipment is the property of the Grantee. In this circumstance, the Grantee may allow the equipment to be transferred to the member's new place of employment or take personal possession of the equipment. Please see Wayne for further information and procedures.

Please note that computers and computer related expenses need to be requested no later than 4 months prior to the end of your appointment date.

Director of Graduate Studies (DGS)

Alícia Adserà, Director of Graduate Studies, 263 Wallace Hall, (adsera@princeton.edu).
Office hours by appointment.

Lynne Johnson, OPR Graduate Program Administrator, 210 Wallace Hall, (ljohnson@princeton.edu).

A graduate student SharePoint site has been established as a Resource Portal. Access to this site is reserved for currently enrolled students. The site requires a Princeton University user-id to authenticate. Yo-Yo Chen is the graduate student coordinator for this site.

The URL is: https://sp.princeton.edu/opr/student_wiki/Wiki%20Pages/Home.aspx

Graduate students embarking on DGS-approved University-sponsored travel must complete a travel request in Concur within 30 days of the last day of travel. Reimbursable expenses are substantiated through Concur. OPR requires receipts for all expenses except meals under \$50. For additional information please refer to <http://travel.princeton.edu/graduate-students> or <https://travel.princeton.edu/graduate-students/checklist> for international travel.

Facilities

Nancy Cannuli (ncannuli@princeton.edu)

Lynne Johnson (ljohnson@princeton.edu)

Fair Use of Resources

As a member of the University community (and more specifically as a member of OPR), you are provided with the use of scholarly and work-related tools, including access to computers, servers, software, printers, services, and campus telephones and in some instances voicemail. In general, your use of such resources should be for purposes that are consistent with the business and mission of OPR (and, more generally, of the University). Personal use of systems should be incidental and kept to a reasonable minimum.

According to University guidelines, use of OPR resources for non-work related matters should not incur additional costs to the University (or department/program), should not prevent an employee from attending to and completing work effectively and efficiently, and should not preclude others with work-related needs from using the resources. OPR has not “policed” resource use and relied on an honor system. We would like to maintain this policy.

FAX Machines

OPR’s main FAX machine is located in Room 209, adjacent to room 208: (609) 258-1039.

CRCW also has a FAX machine in Room 267: (609) 258-5804.

Incoming— If a fax comes in for you, it will be delivered to your mailbox within a reasonable length of time.

Outgoing — You are welcome to send your own faxes. We have OPR cover sheets, or you can design your own. You need not ask for permission to use the fax. Pages should be placed face up.

A confirmation page will automatically print out after the fax has been sent, usually within 10 minutes. The confirmation is on the upper left side of page.

See table below for calling rules:

| Call From | Call To | New Dialing Procedure |
|-----------------------|---|--|
| On campus (258, 986) | On campus (258, 986) <i>Example</i> 83000 | No change 83000 |
| On campus (258, 986) | Non campus 609 or 640 <i>Example</i> 99249529 | 9 + 1 + Area code + 7-digit telephone number 916099249529 |
| Off campus (609, 640) | On campus (258,986) <i>Example</i> 2583000 | 1 + Area code + 7-digit telephone number 16092583000 |

First Aid Supplies

First Aid supplies are located in room 207, and in Regina’s office room 267.

For security purposes please only enter the rooms if the door is open. If closed please be accompanied by an Academic Assistant.

Human Subjects – Robin Pispecky

Job Postings

Mary Lou Delaney (md@princeton.edu) maintains distribution lists for email notices of job openings, which includes their link.

Please see *Kris McDonald* (kemerson@princeton.edu) for CRCW job postings.

Kitchen

CLEAN-UP — Janitors are not responsible for clean-up in the kitchen area or refrigerators. *Please clean up after yourselves.* This includes emptying your coffee grounds into the garbage and washing your dishes and silver and putting them in the drain. It also includes throwing out your food from the refrigerators before it becomes sour or moldy. Your cooperation in this matter will be greatly appreciated by everyone in the building.

If you are borrowing kitchen supplies please clean and return after use.

Language Resources

Humanities Resource Center, Firestone Library

The Humanities Resource Center provides resources, facilities, and support for the purposeful use of technology in teaching, learning, and research. The HRC support independent language study with a large selection of instructional materials and the appropriate viewing technology. The HRC manages the majority of the University's video collection and video reserves.

<http://library.princeton.edu/vdl/languages/>

<http://library.princeton.edu/vdl/>

Rosetta Stone Spanish, is available at OPR but cannot be checked out. Lynne Johnson has a copy that is available for loan.

Library

Website: <https://library.princeton.edu/stokes> General e-mail: piaprlib@princeton.edu

The Ansley J. Coale Population Research Collection is located in the Donald E. Stokes Library for Public & International Affairs on the lower level of Wallace Hall. The hours are posted on the library web page. The two Population Research Librarians are Joann Donatiello (jdonatie@princeton.edu, 8-1377) and

Elana Broch (ebroch@princeton.edu, 8-5517). They are available for individual research assistance and classroom instruction. The Population Research Library Assistant is Tracy Hartman (hartman@princeton.edu, 8-4874). She is available to help locate and retrieve materials.

Occasionally, the library offers orientation and training. All OPR affiliates are encouraged to attend as the information provided enhances the educational experience. Group study rooms with TV monitors, an electronic classroom and standing desks are also available. Signup sheets are outside the door for the group study rooms. The e-classroom can be reserved at <https://library.princeton.edu/stokes/reserve-room/guidelines>.

Mail Services — Mary Lou Delaney

Mary Lou prepares outgoing mail, distributes incoming mail, and handles all mail forwarding. **Postage meter is not for general use – Administrative Assistant staff only.** All mail is sent first-class, domestic and foreign. Regina supervises mailings for CRCW.

There is one Campus mail delivery/pick-up around 1:30 pm. Please be patient if mail is late.

Stamps are not available. The postage meter is not available for personal mail.

Express Mail Services

As part of the University's financial system, Prime Marketplace has replaced our standalone Fedex and UPS sites with a new shipping tool called **eShipGlobal** for both domestic and international shipping. This web-based tool will incorporate our contract pricing. All necessary shipping documents are printed right from the tool. Training tools are available through Prime.

If you have a University Travel & Expense Card you are able to process your shipment yourself and it will be billed directly to your card. Once the shipper has substantiated and submitted the mailing via Concur, the expenses will be routed to the approver.

OPR does not have an open policy on express mailings. All packages require the chart string specific to the sender and project as well as the business purpose of the mailing.

Moving Allowance

Joyce Lopuh – OPR

Tracy Merone – CRCW

Moving allowance will be determined on an individual basis by Nancy Cannuli and Kris McDonald.

Please see <https://finance.princeton.edu/how-to/buying-paying/how-to-pay/paying-for-movingrelocati/index.xml>, administered by the Human Resources Department.

Notary Public — Lynne Johnson

Lynne is a registered Notary Public and will certify both professional and personal documents. There is no charge. Please contact Lynne to schedule an appointment (ljohnson@princeton.edu).

Notestein Seminar Series — Douglas Massey & Tod Hamilton

Mary Lou and *Kristen* organize scheduling, catering and distribution lists.

Seminars are held on Tuesdays from 12:00 to 1:00, Wallace Hall conference room 300.

Office Supply Purchasing and Dispensing

Joyce Lopuh – Purchasing Coordinator OPR office supplies

Regina Foglia – Purchasing Coordinator CRCW office supplies

Steven Mars – Basic Computer Supplies

OPR provides a limited range of office supplies. These supplies are to be used for OPR research, classes and other approved functions. Special order or large quantity requests should be emailed to Joyce (jclopuh@princeton.edu). Please specify in your request a detailed description of the item, size, color, amount, etc.

Routine supplies are purchased through **WB Mason** the University's contracted vendor in the financial Marketplace. You may include in your email the item number of your supply order.

Office supplies are located in the supply closet across from the kitchen; office use only please.

Miscellaneous and higher end items (not located in the hall closet) may be available in-house upon request through Joyce and the Academic Assistants.

Open Space Policy

Please be considerate of the working environment by keeping conversations and cell phone use to a minimum. In particular, the kitchen and the common area outside of the kitchen.

If you are gathering for lunch or a meeting you may use conference rooms 242 and 290 (if available) with the doors closed. Please contact *Mary Lou* (md@princeton.edu) to reserve.

The lobby outside of Stokes Library is a designated University open space.

Photocopying and Scanners

Mary Lou Delaney – General Information, Troubleshooting

Joyce Lopuh – Copier Codes, Supplies

Regina Foglia – CRCW Copier Codes

Copier/Scanner in mailroom: Begin each job by typing OPR's department ID# (emailed to all), PIN ID is not required, press Log In key. Main Menu is on the upper left side of panel. Follow instruction on panel to select options such as color, paper size and orientation, sided paper, and stapler. Detailed instructions are on the wall behind the copier. The stapler is temperamental. Please staple by hand whenever possible.

The Scanning feature is listed under your first name. Please see Joyce if you would like your email address programmed into the copier.

Also, OPR has an automatic document scanner in Room 209 next to the fax machine. It has the capability for duplex (2-sided) and can handle up to 25 pages. First time users please see Steven for the set-up and login process.

Stokes library has a book scanner in Room 013A. The scanner has a flat bed, is very user friendly with clear instructions and saving options.

Printing Services

Lynne Johnson – Students, Business Cards

Joyce Lopuh – Posters, Receipts, Miscellaneous, Business Cards

Tracy Merone – CRCW, Business Cards

Academic Assistants – OPR

All printing requests require the chart string specific to the sender and project.

Business Cards

Personalized business cards may be ordered through Printing and Mailing:

<http://www.princeton.edu/printing-mailing/>

You will be instructed to fill out Princeton's standardized template. Please see Lynne, Joyce or Tracy for the billing chart string.

Poster Printing

Please see *Joyce*, *Lynne* or *Tracy* for the chart string for interdepartmental billing.

Posters can be printed at the Princeton Institute for the Science and Technology of Materials (PRISM)

located nearby in Bowen Hall, <http://posterprinting.princeton.edu/>

or through University Printing and Mailing, <http://www.princeton.edu/printing-mailing>.

Additional information on **PAA posters and mailings** will be circulated from Joyce in January 2019.

Professional Development Committee — Joyce Lopuh

Each year the students and postdocs receive departmental funds to foster professional and educational development.

Hannah Postel will serve as chair for the students.

Catherine Doren and Sarah Gold will serve as chairs for the postdocs.

The purchase of goods or services, reimbursements, and substantiating expenses will be processed by the student through Concur and approved by Joyce.

Inviting researchers or students from another department is allowable. In all cases, a list of attendees including titles and affiliation (<10), or identification of a discernable group (>10), and the business purpose of the meeting needs to be provided along with the receipts in order to be reimbursed.

If another department is contributing to the cost please note the amount and department chart string and include the specifics in the comment field.

Keep in mind that OPR and Finance closely audits all expenses so I can't stress enough the importance of submitting reasonable expenses with proper substantiation.

Conference Meals

Actual daily meal expenses claimed should be reasonable and appropriate. The University considers a reasonable rate of \$75 per day: \$10 for breakfast, \$20 for lunch and \$45 for dinner per person. Receipts are not required when under \$50. You may combine breakfast and lunch on one line for \$30 and a separate dinner line for \$45. Concur will allow without flagging since under \$50.

The purchase and use of alcohol places significant legal exposure on the University. Therefore the use of alcohol for business meals should be kept to a minimum of \$5 to \$15 per person (included in the budget above).

It would be reasonable to provide snacks and beverages when meetings are scheduled to exceed 2 hours.

Unallowable (samples)

- Commuting
- Credit card fees or late payments
- Gifts or gift cards
- Goods or services for personal use
- Social Events
- Spouse/partner meals
- Taxi's – repetitive or exceeding normal University policy

Publications

Joyce Lopuh – (jlclouh@princeton.edu) OPR Publication Databases, NIH PMCID Compliance

Joann Donatiello – (jdonatie@princeton.edu) NIH PMCID Compliance

Kate Jaeger – (kjaeger@princeton.edu) CRCW Publication Databases, NIH PMCID Compliance

GRANT ACKNOWLEDGEMENT

OPR is primarily funded by an NIH Center Grant. Each publication or other document about research supported by an NIH award must include an acknowledgement of NIH award support and disclaimer such as:

NIH Center Grant (reference in all publications):

“Research reported in this publication was supported by The Eunice Kennedy Shriver National Institute of Child Health & Human Development of the National Institutes of Health under Award Number P2CHD047879. The content is solely the responsibility of the authors and does not necessarily represent the official views of the National Institutes of Health.”

NIH PUBLIC ACCESS POLICY COMPLIANCE

Everyone affiliated with OPR, including all faculty, faculty affiliates, students, postdocs, researchers and staff, is required to comply with the NIH Public Access Policy so OPR retains its eligibility for funding. **Failure to comply can impact OPR’s ability to obtain grants in the future.**

What is the [NIH Public Access Policy](#)?

The NIH’s Public Access Policy requires that all papers resulting from NIH-funded research must be deposited in the National Library of Medicine’s PMC database (an archive of full-text biomedical journal papers available online without a fee) within 12 months of publication. The policy applies to all peer-reviewed articles (including their graphics and supplemental materials) accepted for publication on or after April 7, 2008. **Every manuscript written at OPR, or based on data collected at OPR, falls under this mandate, even after an individual leaves the University.** The policy requires that these articles be accessible to ensure that the public has access to the published results of NIH funded research.

The policy does not apply to: book chapters, commentary, letters, book reviews, non-peer reviewed articles, or articles written before April, 2008. Please note that even though these publications do not require PMC compliance, OPR reports them to NIH and they are included in OPR’s Annual Report.

How do I comply?

Information about whether the journal will permit you to comply with the policy, and how to do it, is usually available on the journal or publisher’s web page. If you need help finding this information, please contact our librarian Joann Donatiello (jdonatie@princeton.edu).

The optimal time to arrange for submission is when sending the final manuscript to the Journal. A [sample letter](#) is available for you to include. Either the journal will do the submission for you or you will do it. The process is different for each path and depends upon the publisher and the **agreement you made when submitting the final manuscript to them.** For a list of journals that will submit a paper for you, see the NIH web page. Please note even if a journal is on this list, you must confirm the arrangement with the publisher.

https://publicaccess.nih.gov/select_deposit_publishers.htm

Some journals may contact you to pay an open access fee. It is not necessary to pay an open access fee to comply with the NIH mandate.

Upon submission, you will be given an NIHMS number, which will eventually convert to a PMC ID number. It is essential that you give Joyce this number promptly so she can include them in our reports to NIH.

****Please note that a PubMed ID number is not the same as a PMCID number****

If you are submitting for yourself, see the box below. Please contact Joann prior to submitting retrospective articles (back to April, 2008). In almost every case, you may **not** submit the final **published version** (PDF) of the article.

To submit an article to the NIH PMC database, you will need the following:

- A full citation: author, article title, journal title, date of publication, volume and issue number if available.
- The original manuscript (in a MS word file), including the title page, the article itself and all attachments such as graphs or charts.
- The grant number (Center and/or Training grant above, and other grants see Joyce or Robin).
- The PI on the Center Grant and the Training Grant is Douglas Massey.

Once you have all of the information above, set up a [MY NCBI](#) account and follow the steps for submitting a new article. Both Doug and you will receive e-mails asking for approval of the submission at various stages.

If you have any questions about complying with the NIH Public Access Policy, our librarian Joann Donatiello (jdonatie@princeton.edu) will be happy to assist you.

Frequently Asked Questions: <http://publicaccess.nih.gov/faq.htm>

OPR Publication Database – Joyce Lopuh

Joyce maintains a separate database of all OPR publications and presentations for our Annual Report and will send out requests for updates periodically. The preferred method of submission is to send your CV annotated with information about NIH Public Access Policy compliance for each publication (i.e. NIHMS number, PMC ID number, policy not applicable and the reason, etc.) It is expected that the annotation will reflect the most current compliance status as the NIHMS number will eventually convert to a PMC number.

Receptions/Conferences

Conference Room Scheduling — Please contact *Mary Lou* (md@princeton.edu) to schedule Conference Rooms A and B (rooms 242, 290) and the computing lab for classes and meetings.

Regina Foglia (rleidy@princeton.edu) and *Tracy Merone* (tmerone@princeton.edu) coordinate CRCW receptions and conferences. Please contact Tracy to schedule Conference Room C (room 275).

Susan Murray from the WWS schedules the Seminar Room in 300 Wallace Hall. When submitting catering or room requests, please use the room reservation and catering forms that can be found on the web at <http://wws.princeton.edu/intranet/business-and-facilities/forms/wws-room-reservation-form>

Please contact Mary Lou if you need assistance.

The link below may be useful if you are interested in scheduling a conference room on campus: <http://registrar.princeton.edu/classroom-information/index.xml>

Recycling — Please use appropriate containers around the building

Research Grant Proposals — Robin Pispecky and Nancy Cannuli

Telephones

Mary Lou Delaney – OPR Coordinator, Conference Telephone (md@princeton.edu)

Regina Foglia – CRCW Coordinator (rleidy@princeton.edu)

Mary Lou updates the OPR office and home information lists. Other services may include maintenance requests and emergency contact numbers.

Please contact Mary Lou or Regina if you would like to borrow our conference telephone. You may contact an Academic Assistant if Mary Lou or Regina is not available.

Please contact Steven (smars@princeton.edu) if you would like to connect Jabber with our new Cisco voicemail system.

See table below for calling rules:

| Call From | Call To | New Dialing Procedure |
|-----------------------|---|--|
| On campus (258, 986) | On campus (258, 986) <i>Example</i> 83000 | No change 83000 |
| On campus (258, 986) | Non campus 609 or 640 <i>Example</i> 99249529 | 9 + 1 + Area code + 7-digit telephone number 916099249529 |
| Off campus (609, 640) | On campus (258,986) <i>Example</i> 2583000 | 1 + Area code + 7-digit telephone number 16092583000 |

Travel Guidelines

Lynne Johnson – Students

Joyce Lopuh – Postdocs, Researchers, Visitors, Administrative, Library and Technical Staffs

Tracy Merone – CRCW

Academic Assistants – Faculty

Mary Lou Delaney – Notestein Seminars

Please be aware that certain University guidelines are subject to the discretion of the Office

Travelers should familiarize themselves with the responsibilities they assume when traveling on University business. Routine University guidelines are summarized below. For additional clarification you may access: [Travel Policy](http://travel.princeton.edu/graduate-students), <http://travel.princeton.edu/graduate-students> or <https://travel.princeton.edu/graduate-students/checklist> for international travel.

Concur access: <https://travel.princeton.edu/>

Training modules:

[Travel and Expense Program Introduction](#)

[Manage Your Concur Profile](#)

[Creating a New Expense Report](#)

Submit your request for reimbursement within 30 days of incurring the expense. After 60 days, any reimbursement will be reported to the IRS as taxable income. For additional details, please see the [Reimbursement Policy](#).

Graduate Students should refer to the DGS memo for particulars on conference funding. OPR will support students through their first year of Degree Completion Enrollment (DCE) status provided the student is working full time towards degree completion.

Functionality in Concur pre-populates many fields for you, or prompts you to enter information that informs the Business Purpose, such as names of attendees for group meals. These available fields vary depending on the expense type.

Please attach all supporting documents to your first expense line. Unfortunately Concur does not have an equivalent field for this purpose. Documents may include DGS and grad school correspondence, conference announcement page and your participation page. Receipts should be clear to read. **Do not scan a receipt on top of a receipt.** Please feel free to make notations on the receipt prior to uploading (example: lunch attendees and business purpose).

Do not attach documentation to a \$0 line item. Prime will not record in Financial Reporting.

Princeton University's Travel Agency

World Travel is the University's new travel provider. They may be contacted at 888-530-4087 or princeton@worldtravelinc.com.

Documenting the "Business Purpose" for Reimbursements

On all Concur Expense Reports — whether the expense is for conference registration, research supplies, or travel — you must provide justification for the purchase. It's essential that reviewers, approving managers, and auditors understand the circumstances under which you made the purchase and why it was necessary.

Your brief, accurate, and complete description of the "Business Purpose" should be clear enough that a person outside the University could read it years from now and have no question about the eligibility of the expense for reimbursement. The Business Purpose field should include:

- who received the benefit from the expenditure;
- what purpose the expenditure served, why the expense was necessary, or how it furthered the University's goals; and

- where and when the expense took place.

Examples:

Report Header/Name: (Individual's Name & Purpose): B. Pitt, PAA 2019 Annual Conference

Business Purpose: Individual's Name, Conference Name or Award Type, Fiscal Year

(ex: B. Pitt, PAA Annual Conference presenting, Austin, TX April 2019)

Trip ID: Same as Business Purpose (limited characters - last name, abbreviated purpose, location)

Please record the same Business Purpose description in the Concur Report **Header** and **Trip ID**. These categories feed different financial reports. As much detail as you can fit the better, beginning with your name.

Comments

Concur does not consistently save your comments after the report has been approved for payment. Attaching a brief (or not so brief) memo is very helpful, especially since the Business Purpose has limited character space. A separate memo may adequately describe what purpose the expenditure served, why the expense was necessary, or how it furthered the University's or research project's goals.

Air Travel

Reservations should be made at least 14 days in advance to ensure the most convenient and cost effective fares. Transaction fees associated with business travel reservations are allowable.

Class of Service

Travelers must purchase the lowest available economy class airfare that meets the needs of the business trip. Travelers may upgrade the level of service at personal expense or by using their "frequent flyer".

Airline Requirements for Federally Funded Sponsored Research Projects

Under the Fly America Act (FAA), government regulations require the use of a U.S. air carrier when traveling outside the U.S. In some instances, a non-U.S. air carrier may be used if it meets one or more of the exception criteria listed in the Federal Travel Regulation (FTR) guidelines section 301-10.135-138. The Waiver of Fly America Act lists all available exceptions, which include Code Share and Open Skies Agreements. Note that some federal agencies consider Canada, Mexico, and/or U.S. Territories as "foreign". If the award terms and conditions do not specifically indicate that travel to/from Canada, Puerto Rico, or Mexico is considered as domestic travel, the trip is considered to be foreign travel.

Code Share Agreement

The Code Share Agreement provides for compliance with the Fly America Act if the U.S. air carrier is the ticketing agent and issues a flight on a non-U.S. air carrier. The payment for the airfare must be made to the U.S. air carrier. If a non-U.S. air carrier is the ticketing agent, the flight is considered a non-U.S. air carrier flight and is in violation of the Fly America Act.

Open Skies Agreements

Open Skies Agreements provides that qualifying travelers, whose travel is supported by federal funds, may travel on airlines from the European Union, Australia, Switzerland and Japan as well as U.S. Flag Air Carriers. Travel being reimbursed using Department of State (including all of the Department of Defense) funding is not eligible for the Open Skies Agreements exception.

Alcohol

The purchase and use of alcohol places significant legal exposure on the University. Therefore the use of alcohol for business meals should be kept to a minimum of \$5 to \$15 per person (included in the budget above).

For travel greater than 30 days, a travel allowance of up to 50% of the federally published per diem rates for meals and incidental expenses may be claimed, and receipts are not necessary. Use the domestic or foreign per diem rates applicable for the city and dates of travel. Incidental expenses included in the domestic per diem rates are tips for services (e.g. porters, baggage carriers, bellhops, and hotel maids). International per diem rates include laundry and dry cleaning in addition to tips for services. If a travel allowance is claimed, additional expenses for meals and incidentals will not be permitted.

Baggage

Charges for baggage that are reasonable and appropriate for the purpose and length of the trip are allowable.

Booking Reservations

Travel arrangements may be made through the Concur Travel online booking tool or by calling the University's travel management company, World Travel at 888-530-4087 or princeton@worldtravelinc.com.

Emergency Contacts

The University's Travel Care Program is an important resource to help keep our travelers safe and secure. Traveler's should complete and maintain their profile information, including mobile phone numbers and contact details, within the Concur Travel and Expense system. Additionally, graduate students must register all

University sponsored international travel.

Emergencies When Traveling Overseas

The University has contracted with International SOS to provide worldwide access to emergency and medical assistance services 24 hours a day. International SOS services are designed to help you with access to medical, personal, travel, security, and legal services when away from home. Call International SOS at any time to gain assistance with simple or critical matters.

Hotels

Reservations may be made online through Concur Travel or by contacting World Travel. When booking a hotel for a conference where there is a special conference rate, the reservation may be made directly with the hotel.

The itemized hotel bill must always be included on the expense report.

Hotel Class and Rooms

The class of hotel must be reasonable and appropriate for the business purpose and location. University travelers should stay in standard rooms only. Suites and other upgraded rooms are not allowable expenses. If there is a valid business need for a non-standard room, the business purpose must be documented on the expense report.

Rate Guidelines by Location

The following are guidelines for maximum nightly rates by location, (note: budget restrictions may apply). If the nightly rate exceeds the amount below, the business purpose must be clearly documented on the expense report. This list will be reviewed and updated periodically.

United States

- \$350 New York City, San Francisco
- \$300 Washington D.C., Boston
- \$250 All other U.S. locations, except Princeton
- \$190 Princeton, except during Reunion/Commencement week

International

- \$350 Delhi, Johannesburg, London, Mumbai, Nairobi, Paris, Rome
- \$300 All other international locations

Meals

Actual daily expenses claimed should be reasonable and appropriate and should not be more than \$75 for domestic travel. The University considers a reasonable rate of \$10 for breakfast, \$20 for lunch and \$45 for dinner. Receipts are not required if under \$50.

\$125 per day is allowable for international travel.

Quick Expenses

The “Quick Expenses” tab allows users to quickly enter multiple out-of-pocket expenses to a Concur report in a convenient grid format. Quick Expenses allows you to enter the transaction date, expense type, business purpose, city, and dollar amount for a number of items at one time. Use the blue (+) sign to duplicate rows and easily edit dates and dollar amounts as needed. After saving, you will be prompted to attach receipts to expenses over \$50.

The Quick Expenses tool is useful when entering multiple individual meal expenses in one format. Most notably, the requirement to include a vendor name for the meal has been removed. Simply enter one row and use the plus sign to duplicate it, edit and save.

Miscellaneous Field

Only use if no other category is available, even slightly. Concur may translate a miscellaneous expense to an unsuitable code (example: any type of lodging, you may use the hotel category).

Personal Auto - Mileage Reimbursement

When a personal car is used for transportation between home and station or airport in lieu of a taxi or limousine, mileage and parking costs may be charged if the cost does not exceed the cost of alternative transportation, or if there are other advantages, such as substantial savings in time. Personal car mileage is calculated for you in Concur: [Entering Personal Car Mileage](#)

While on domestic University business, decline Collision Damage Waiver (CDW) and personal liability insurance offered through the car rental company, provided that the reservation is made through Concur Travel or by contacting World Travel. If proof of insurance is needed, contact the Department of Risk Management at (609) 258-3046.

<https://finance.princeton.edu/how-to/insurance-risk-management/insurance-risk-management/travel-related-insurance/>

Personal Travel

When personal travel is combined with University business travel, only the business portion of the trip is an allowable expense. Personal expenses should be paid with personal credit cards or other methods that do not result in the University paying for the personal expense. Please supply a formal round-trip itinerary for the true cost from Princeton to destination for reference. Please reference your amended travel in the “Business Purpose” and “Comment” section.

Rail

Travel by rail is allowed when it is less expensive than alternative means of transportation or when there are convenience or safety issues that justify the additional cost. Business Class travel is allowable for regular Amtrak service as well as for Acela Express Trains. For international rail travel, travelers should purchase a fare that offers reserved seating. Often, reserved seating is only available in first class. Roomettes are allowable for overnight travel.

In cases where sponsored funds are being used, and where business or first class fares are not an allowable expense, departmental funds may be used to cover the difference.

Passports and Visas

Expenses related to visas and passports required for business travel are allowable expenses.

Taxi's

Please keep reasonable.

Tip Guidelines

The following would be considered reasonable and appropriate:

Skycap: \$2 per bag

Porters/bellperson, etc.: \$2 per bag upon check-in/check-out

Maid service: up to \$2 per day

Meals: lunch 15% – dinner 20% (if not included in the charge).

Car Service: 15-20% is appropriate if not using a contracted service that includes a negotiated rate

<https://travel.princeton.edu/suppliers/car-rental>

<https://finance.princeton.edu/how-to/insurance-risk-management/insurance-risk-management/travel-related-insurance/>

Vaccinations

Expenses for vaccinations required for business travel are allowable expenses. University travelers are strongly encouraged to obtain vaccinations through University Health Services, <http://uhs.princeton.edu/>.