**University Research Grants Program Procedures**

**All expenses under your University Research Grant award will be processed in accordance with Westfield State Finance Office procedures and handled through the Office of Grants and Sponsored Programs for proper assignment to your award.** Any forms for travel, contracts with consultants, requests for equipment or supplies, must come through this office with sufficient lead time *prior* to the need for travel, equipment, supplies, etc. Please contact this office with any procedural questions you may have *prior* to making purchases. All expenses must be in accordance with your proposal and award. **Any changes to your project or award require approval of the Grants Director.**

1. **Requests for Supplies or Equipment:** Any supply needs for your project must be placed through the Grants Office. Anything that will cost less than $200 will not require a purchase order. If purchases are made using a credit card, original receipts must be provided to this office to process a reimbursement under your award. Our office can place an order for you for any supplies needed for your project, however please send your request to our office with sufficient time for processing before the supplies are required. All equipment orders under your award are handled by this office in accordance with WSU Procurement Procedures. Any supplies or equipment over $200 require a purchase order. Please be aware of Finance Office deadlines such as Fiscal Year Closing Deadlines which are usually at the end of April if you need equipment for your project before the fiscal year end of June 30.
2. **Contracts for Services:** Any consulting services or services contracted with outside providers will require a Contract for Services Form. The Grants Office can prepare the necessary forms. Contact information will be needed for the provider such as legal name, address etc. so a contract can be sent to the provider for signature. Services for less than $500 do not require a contract, however provider contact information is still required so a W-9 can be sent to the provider and completed. The W-9 is required to set up the provider as a vendor in Westfield State’s Finance System.
3. **Stipends:** Any stipends awarded to you will be processed through this office. Completion of a Massachusetts Standard Contract and a Temporary Employment Agreement will be required.
4. **Requests To Travel:** You will need to complete a Request to Travel form with sufficient time for processing in advance of any travel. **The Grants Office needs to receive your Request to Travel at least ten days prior to your departure date.** particularly if your travel is in this fiscal year (i.e. before June 30). The Finance Office’s deadline for all Requests to Travel for this fiscal year is usually in late April. If your travel is in the next fiscal year (i.e. after July 1) please send your Request to Travel Forms to the Grants Office in advance of your travel in the next fiscal year. You will need to include documentation of your airfare and registration for the event, should you wish to obtain a travel advance to cover these expenses. An agenda for the event should also be included. The Request to Travel Form needs to be sent through the Grants Office for processing to ensure the assignment to your award, rather than sent directly to Travel in the Finance Office. **All original receipts are required for reimbursement of travel expenses.**
5. **Travel Advances:** If you will need the University to pay for registration for your workshop/conference etc., a Travel Advance Form will need to be completed and sent to our office for processing along with any voucher/invoice/registration form that should accompany the check. Be sure to leave enough time for processing the forms. If you intend to pay the registration yourself and get reimbursed on your Travel Reimbursement Form, then this step can be ignored.
6. **Travel Reimbursements:** For any expenses that are incurred for travel, **keep all itemized original receipts.** Be sure to get detailed receipts showing who the money was paid to, what it was for and the amount. This includes any restaurants you purchase a meal at; don’t just accept a credit card machine slip that only shows a total of the amount charged. Finance will reject non-itemized receipts that do not show the name of the business, and how the purchase was paid (i.e. credit card, cash, etc.). When you complete the Travel Reimbursement Form upon return from the workshop, please send the Travel Reimbursement Form to the Grants Office with all of your receipts for proper assignment to your award. **All travel expenses must be reimbursed within 45 days of your travel date, so it is important to submit your Travel Reimbursement Form and receipts in a timely fashion. Finance will not reimburse for expenses older than 45 days. *Please be sure to send your forms through the Grants Office and do not sent them directly to Travel!***
7. **Other Approved Expenses:** If you have any other expenses that are incurred for your project, as long as they are an approved part of your proposal, such as materials for the completion of your project, please retain receipts and send them to the Grants Office for processing. Finance has a 45 day window between incurring an expense and obtaining reimbursement, so do not delay too long between incurring an expense and sending your receipts for reimbursement.
8. **Other Project Travel:** If mileage is an approved part of your proposal and award for your project, especially if regular travel will be involved, it is possible to establish a Blanket Travel Request with an estimated amount of mileage for your project. This will circumvent the need for a Request to Travel Form for each travel instance and will only require a Travel Reimbursement Form for your actual mileage for the project for each instance. You should write down the odometer mileage on your vehicle at the beginning and end of each trip to include on your Travel Reimbursement Form. Once again, Finance has a 45 day window between incurring an expense and obtaining reimbursement, so you should not wait too long between incurring mileage and sending the Travel Reimbursement Form to the Grants Office. All reimbursements must come through the Grants Office for proper assignment to your award.

If you have any questions about your award, please do not hesitate to contact Louann D’Angelo in the Office of Grants and Sponsored Programs or stop by Parenzo 103A.

413-572-5622

ldangelo@westfield.ma.edu