Office of Research

Documentation for Payment Requests on Sponsored Projects

presented by Sponsored Projects Services (Financial Post-Award)

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Housekeeping

- Webinar is being recorded
- Link and slides will be emailed & posted to our website
- Keep microphones muted
- Type questions into the chat or unmute at the end

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GRANTS

- The sponsor specifies how the funds should be used, as outlined in the supporting documentation (e.g., award letter or grant agreement).
- A line-item budget is required, detailing expenditures by activity, function, and project period.
- Sponsor is entitled to a license or ownership of the deliverables.
- The sponsor may require technical or scientific data to be given to them as a condition of the award and make a claim on the patents, copyrights, or other intellectual property rights resulting from the supported activities.
- The sponsor requires financial (budget) reports, progress reports at certain intervals during the course of the work, and a final report.
- The sponsor establishes a set of performance objectives. There is a specified time period for conducting the project and for using the funds.
- The sponsor may require that the remaining funds at the termination of the project be returned to the funder.

Sponsored Project Services (SPS)

sps@chapman.edu

Post-Award (Financial)

Morgan Sohrabian (Director of Post-Award Services)
Shawn Scott (Sr. Grants and Contracts Administrator)
Steph Wenning (Post-Award Research Administrator)
Melissa Cardinale (Post-Award Analyst)

- Monitor financial compliance (*Administrators*):
  - Review and approve hiring and salary allocation documents as prepared by department administrators/operation staff
  - Review and approve expenditures
- Prepare and submit financial reports to sponsors (*Administrators*)
- Collaborate with department staff (*Operation managers, Coordinators, etc.*), offices (*OOR, FS, AP, HR, etc.*), and PIs to resolve issues
- Tracking and projection of awards (*Analyst*)
- Tracking and monitoring of subawards (*Analyst*)
- Troubleshoot financial matters (*Analyst and Administrators*)

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SPS Expense Review and Approval

What are we looking for during our review?

- 2 CFR 200 Cost Principals:
  - ❑ Is the expense allowable on the grant?
  - ❑ Is the expense allocable to (clearly identified as directly relating to) the grant?
  - ❑ Is the expense a reasonable cost? Would a prudent person find it reasonable?
  - ❑ Is the expense necessary for the aims of the grant/scope of work?
  - ❑ Is the expense being treated consistently?
  - ❑ Is there proper documentation to justify that the expense meets all of the above? Even allowable expenses can be disallowed without proper documentation.

Non-PO Payment Requests

- These are used for non-Chapman-employed vendors or independent contractors and for Chapman students.
  - A Supplier Profile should not be created for a Chapman staff, administrator, or faculty member.
  - For payments $5,000 or greater, a PO is required.

Concur Payment Requests

- These are used for all Chapman staff, administrators, and faculty.
  - This includes reimbursements for out-of-pocket payments as well as PCard transactions.

Please include the PI's name on the non-PO payment requests and POs.

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Chapman University Fiscal Policy

- A key factor in determining allowability of an expense on a project is that we are following our own institutional policies.
  - Along with our SPS- and OOR-specific policies, Fiscal Policy applies to all expenses, and it must be followed.
  - Our Fiscal Policy helps us maintain consistency on expenses.

- Commonly seen instances of payment requests that do not align with fiscal policy are:
  - Specific meal reimbursement rather than per diem while traveling. (*2.6.1 Meals*)
  - Missing appropriate documentation for Conferences. (*2.7.1 Conference Registration*)
  - Rideshare receipt screenshots that exclude the to/from locations and no justification for the business and research purpose of the ride. (*2.7.2 Parking Fees, Tolls, Taxis*)
  - Independent Contractor invoices without attached ICA (*1.2.4 Professional Services*)
  - Subject Payments without attached IRB approval (*1.2.15 Gift Cards*)

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Travel Reimbursements

Documentation

- Full receipts (itemization and method of payment)
  - For taxis and rideshares, this should include the to/from locations.
    - Exception: rideshares for study participants should have their home address redacted.
- For students, there should be written confirmation from the PI about how the student's travel benefitted the grant and contributed to the scope of work.
- An agenda, program, and/or schedule for the conference, meeting, or workshop attended.
  - If none is available or provided, then at a minimum we should know the title of the conference, the location, and the dates.
  - If per diem is requested, the schedule must be attached to each line to verify any meals provided.

Justification

- What is the business and research purpose of the travel?
  - Are research and results being presented? Is it a networking event?
  - Does this travel benefit the grant? How does it contribute to the scope of work?

Note: Financial Services' Tax Compliance may require further documentation or justification for these reimbursements.

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Per Diem vs. Meal Reimbursement

2.6.1 Meals

For domestic travel, Chapman University follows Internal Revenue Service rules for per diem meals and incidental expense (M&IE) reimbursement. Employees will receive a per diem allowance for their personal meals actually consumed when traveling out of town for substantially longer than an ordinary day's work, so that you need to sleep or rest to meet the demands of your work while away from your home campus. For example, if you leave your home campus at 6AM and travel to another location then return to your home campus at 10PM you would not qualify for any meal reimbursement, because you did not need to sleep or rest away from home. Stopping to take a nap does not qualify. The university does not pay per diem for meals provided by your host or other party.

The university has adopted GSA (domestic) and SSA (international) rate standards for per diem payments. These rates will vary by location and are updated at least annually. Rates are automatically calculated within Concur based upon the travel itinerary entered.

Additionally, the university has adopted the federal standard of paying 75% of a full-day per diem for the days traveled from and returning to the traveler's home. Concur will automatically calculate this value based upon the itinerary entered. It is possible to over-ride this calculation when circumstances truly warrant. For example: the trip home did not begin until very late in the evening.

The appropriate University Vice President may with special exception authorize reimbursement of actual meal expenses instead of the standard per diem. The actual expense must be supported by the original receipt (showing itemized purchases).

See section 7.2.10 for the International Travel Policy.

2.6.2 Tips and Gratuities

The per diem rate for meals and incidental expense (MI&E) includes meals, tips for room service and gratuities to servers of food or beverage, payments to porters, skycaps or others for moving luggage or packages, or any payments of small amounts of money in appreciation of personal assistance.

U.S. General Services Administration (GSA)

For student travel reimbursements, submitted on a non-PO, a PDF of the M&IE rates should be included. For employees, Concur automatically calculates the per diem (Daily Allowance) based on the entered itinerary. This includes taking the First and Last Day of Travel into account at 75%.

Meals and incidental expenses (M&IE) rates and breakdown

The M&IE total is the full daily amount for a single calendar day when that day is neither the first nor last day of travel. The amount received on the first and last day of travel equals 75% of the M&IE total. See M&IE breakdowns for information related to the individual meal amounts.

Filter results...

Primary destination	County	M&IE total	Breakfast	Lunch	Dinner	Incidental expenses	First and last day of travel
Tacoma	Pierce	$86	$22	$23	$36	$5	$64.50

Showing 1 to 1 of 1 entries

Be sure to **deduct any meals provided by/included with conference registration**. We cannot pay for a single meal twice. Attach the conference schedule as a receipt to provide documentation of the meals that were provided by the conference, confirming the appropriate meals were deducted.

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What is a receipt?

Are receipts required?

Receipts must be submitted in Concur for reimbursement of all expenses of $25.00 or more.

What is a receipt?

For business purposes, a receipt is a detailed record provided by the merchant after a transaction has been completed. It must include:

- The name of the seller/business
- Date of the transaction
- Amount
- A detailed list of the item(s) purchased
- Form of payment

Order forms, reservations, confirmations, and copies of a credit card statement are not acceptable receipts.

While our Fiscal Policy does allow for expenses under $25 to not require a receipt, for grants it is crucial to have receipts for all purchases. For PCard purchases, in addition to the Missing Receipt Declaration, the Lost/Itemized Receipt Form must be completed and attached as if it were a receipt. The form details what would have been included on the receipt, as well as why no receipt is available, and signatures.

Uber

Apr 29, 2026
11:36 AM

Tip

Thanks for tipping, [redacted]

We hope you enjoyed your ride this morning.

Total	**$95.70**
Trip fare	$71.38
Booking Fee	$4.98
King County accessibility and admin fee	$0.33
SeaTac Airport Pickup Fee	$6.50
Tip	$15.95
WA Driver Benefits Fee	$0.61
WA Driver Resource Center Fund Fee	$0.15
Promotion	-$4.20

Payments

Apple Pay Visa ••••4301 4/29/26 12:08 PM	$67.81
Uber Cash 4/29/26 12:08 PM	$11.94
Uber Cash 4/29/26 12:14 PM	$15.95

Is this a complete receipt?

No; it is missing the to/from locations, which for rideshares qualify as the itemizations.

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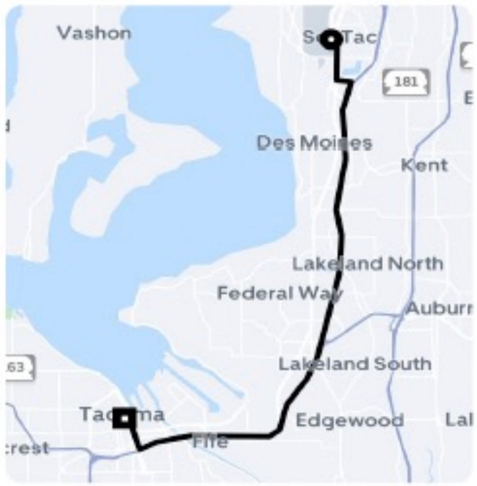
Trip details

Women Drivers
20.80 miles, 28 minutes

11:39 AM
17801 International Blvd, Seatac, WA 98158, US

12:08 PM
1320 Broadway, Tacoma, WA 98402, US



You rode with Jessica 4.98 ★

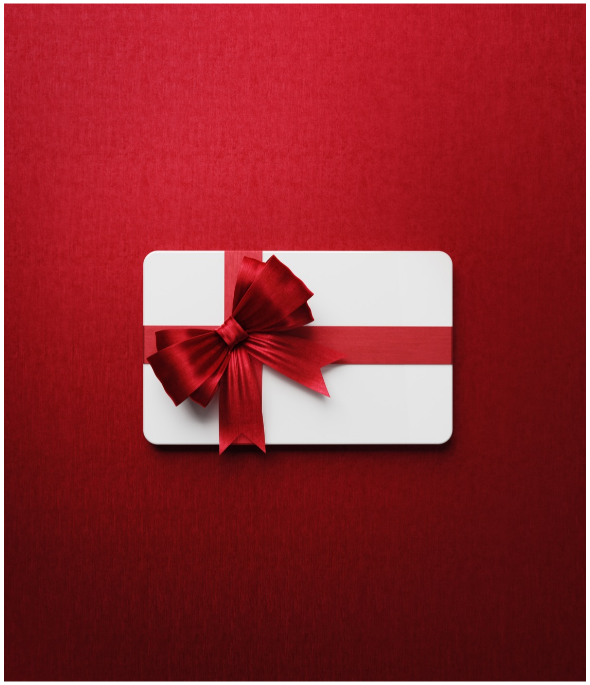
When you ride with Uber, your trips are insured in case of a covered accident. Learn more

Want to review your trip history? My trips

What about now?

No; the first page of the receipt indicated Uber Cash was used for a portion of the payment. Because we don't know how that Uber Cash was loaded to their Uber account, for further documentation we need to attach the card transaction that indicates how the funds were loaded to Uber Cash.

We need this to confirm that a *gift card* was not used to purchase the Uber Cash.



Gift Cards per Fiscal Policy

1.2.15 Gift Cards and Cash Equivalents

Except as described below, Chapman University does not compensate, reward, acknowledge, incent, gift, or otherwise present to any individual a payment in the form of a gift card or other cash equivalent. Gift cards or their equivalents may not be purchased through any University controlled funds (including grants and gifts) and requests to reimburse individuals for the purchase of such items will not be honored.

Research Exception—Gift cards may be issued as incentive to human participants in qualified research programs, subject written approval of the University's Institutional Review Board. Research projects receiving IRB approval for human Subject Payments must adhere to the University policy on compensating research participants.

This also means that if a gift card is used to pay for something, we cannot reimburse for that expense.

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Gift Cards cont.

As stated in Fiscal Policy 1.2.15, gift cards may be purchased as incentives for human participants in research projects that have IRB approval.

When reconciling gift cards purchased for participants (Subject Payments), the **IRB approval document or letter** must be attached as part of the documentation.

TO: [redacted]

FROM: Chapman University Institutional Review Board

DATE: June 23, 2023

RE: Reliance on External IRB

STUDY #: IRB-[redacted]

STUDY TITLE: [redacted]

FUNDING: N/A

Dear [redacted],

This letter is to notify you that your study IRB-[redacted] has been approved by an external IRB. Note that when an external IRB reviews the study on behalf of Chapman University, only the actual IRB review is ceded to that IRB. The local requirements regarding the conduct of research will remain Chapman University's responsibility. As such, the Principal Investigator (PI) should continue working with Chapman's IRB to ensure that investigators and research staff meet the training and conflict of interest disclosure requirements. The Chapman PI must continue to provide information in Cayuse IRB regarding:

- Changes in Chapman personnel
- Changes in Chapman's role in the study
- Changes in the informed consent forms for the project
- Adverse events that involve Chapman personnel

Note: The IRB of record is responsible for approving any changes to the study including a change in procedure, number of participants, personnel, study locations, recruitment materials, study instruments, etc.

Sincerely,

[redacted]
Chair, Institutional Review Board

Date: 5-21-2026

IRB #: IRB-26-15
Title: [redacted]
Creation Date: 8-21-2025
End Date:
Status: Approved
Principal Investigator: [redacted]
Review Board: Expedited
Sponsor:

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ICAs / Service Agreements / Speaker Agreements

- The agreement must be on file with AP and should be included as documentation with either the non-PO payment request or the blanket PO.
  - PeopleSoft is a resource that allows this documentation to live in one place; let's use it!
  - Post Award is not involved in the drafting or execution of these agreements and often does not see them until a payment request or PO is submitted for review and approval. We need to see them to verify details before approving payment on the invoice.

1.2.4 Professional Services

All independent contractors or consultants must submit invoices in order to be paid. If the service is ongoing, a maintenance contract for instance, or if the total to be paid is over $5,000, a purchase requisition should be submitted at the beginning of the contract period.

A copy of the contract, proof of insurance and a W-9 form must be on file in Accounts Payable prior to the issuance of the initial payment to an independent contractor.

Fellowships

Many sponsored projects include fellowships for students. Award letters must be included with the payment request that detail:

- The name of the fellowship recipient
- The reason for the fellowship (e.g., participation in the grant's scope of work)
- The amount of the fellowship / disbursement schedule
- The name or title of the project with which the fellowship is related
- Standard verbiage regarding tax counsel, IRS rules, Form 1099s, FICA, and IRS Publication 970
- Signed by the appropriate approver or issuer of the fellowship.

Issuing fellowships is an instance where collaboration is especially beneficial to ensure all departments' documentation needs are met. The school or institute, AP, Tax Compliance, and SPS may have differing requirements depending on the grant, the student, and the payment.

Fellowship Letter Examples

We are pleased to provide you with a Scholarship/Fellowship Award in the amount of $200 in connection with your 2024 participation in the Dispute Resolution for Juveniles Clinic offered through the Fowler School of Law. The disbursement of this award will occur as a single payment of $200. The award will be disbursed the week of September 30, 2024.

Please be advised that it is the University's conclusion, after consultation with outside tax counsel, that this amount represents a scholarship/fellowship grant for federal income tax purposes.

Under IRS rules relating to the payment of scholarship/fellowship grants, the University, as the payer of the grant, is prohibited from withholding any tax from the grant payment. In addition, the University is instructed not to report the amount of the grant payment on Form 1099 (or any other IRS tax form) to either the IRS or the grant recipient.

The amount of a scholarship/fellowship grant is not subject to FICA or self-employment tax because it is not a payment for services rendered. But some scholarship/fellowship grants are subject to federal income tax. Generally, scholarship/fellowship grants are taxable to the grant recipient unless they relate to tuition and required fees, books, supplies, and equipment.

The grant made to you in connection with your position as a Student Mediator appears to be a taxable scholarship/fellowship, but you should check with your own tax advisor to confirm this conclusion. You might also review IRS Publication 970 (Tax Benefits for Education, which can be found at http://www.irs.gov/pub/irs-pdf/p970.pdf) as well as the instructions to Line 7 on Form 1040, which can be found at http://www.irs.gov/pub/irs-pdf/i1040.pdf.

If you have any questions regarding the fellowship, please contact [redacted]. The University does not provide tax advice, however, so you should contact your personal tax advisor with any questions or concerns in that regard.

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Re: Beckman Scholars Program (BSP) Letter of Award to [redacted] June 3, 2025

Dear [redacted]

The BSP Selection Committee and the faculty of BIOL, BCHM, and CHEM again would like to congratulate you on being named a Chapman Beckman Scholar and Mentor! We think you will do an outstanding job leading the way to continuing to develop a stellar Chapman Beckman Scholar Program for future BSP Scholars!

Foundation Mission

Dr. Arnold O. Beckman and his inventions revolutionized the study and understanding of chemistry and human biology. He assumed many roles – educator, inventor, civic leader, and philanthropist. His life and career were built on his personal integrity, sense of humor, and love for science. Today, the Arnold and Mabel Beckman Foundation holds steadfast to the directives of Dr. Beckman and his wife Mabel, their values, and the mission of the Foundation; **to provide grants to U.S. researchers and U.S. nonprofit research institutions in chemistry and the life sciences, to promote scientific discoveries and particularly to foster the invention of methods, instruments, and materials that will open new avenues of research.** Dr. Beckman believed strongly in reinvesting in science and research, supporting up and coming scientists and looking for the future "Arnold Beckmans" of the world.

Program Purpose

The Beckman Scholars Program (BSP) is dedicated to identifying, nurturing, and mentoring undergraduate research scientists throughout the United States who have the potential to become national leaders in their fields of chemistry, biochemistry, the biological sciences and the medical professions.

The Terms and Conditions of your Beckman Scholars Award are as follows:

Year 1: Summer 2025, Academic Year 2025-26, Summer 2026

Award amount of $26,000: $21,000 specifically for the Scholar and $5,000 for the Scholar's Mentor

Student Stipend $18,200; distributed as follows:

a. First Summer - $6,800
b. Academic Year - $4,600
c. Second Summer - $6,800

Student Scientific Supply and Travel $2,800; distributed as needed, to support current research activities

Mentor Stipend $5,000; distributed as needed, during the associated Scholar's award term to support the following, but not limited to:

a. Scholar Mentorship Plan (SMP)
b. Mentor Travel - to support attendance with Scholar at outside scientific symposia
c. Scientific Supplies - related to the Scholar's research
d. Publication fees - for publishing in undergraduate and peer reviewed publications related to Scholar's research

Income Taxes: Please be advised that it is the University's conclusion, after consultation with outside tax counsel, that this amount represents a scholarship/fellowship grant for federal income tax purposes. Under IRS rules relating to the payment of scholarship/fellowship grants, the University, as the payor of the grant, is prohibited from withholding any tax from the grant payment. In addition, the University is instructed not to report the amount of the grant payment on Form 1099 (or any other IRS tax form) to either the IRS or the grant recipient. The amount of a scholarship/fellowship grant is not subject to FICA or self-employment tax because it is not a payment for services rendered. But some scholarship/fellowship grants are subject to federal income tax. Generally, scholarship/fellowship grants are taxable to the grant recipient unless they relate to tuition and required fees, books, supplies, and equipment.

The grant made to you in connection with the Beckman Scholars Program appears to be a taxable scholarship/fellowship, but you should check with your own tax advisor to confirm this conclusion. You might also review IRS Publication 970 (Tax Benefits for Education, which can be found at http://www.irs.gov/pub/irs-pdf/p970.pdf) as well as the instructions to Line 7 on Form 1040, which can be found at http://www.irs.gov/pub/irs-pdf/i1040.pdf).

Award Conditions: students named Beckman Scholars are required to perform research activities part-time (ten hours per week) during one academic year, and full-time over two consecutive summers (ten 40-hour weeks each summer). Scholars must be full-time students and remain in good academic standing, intending to pursue an advanced science degree or other scientific pursuits.

Beckman Symposium: Each Beckman Scholar may be invited to attend the annual Beckman Symposium in each of the two summers of their award term; a formal notification and invitation will be sent separately. Travel and hotel accommodations are provided by the Arnold and Mabel Beckman Foundation. **All second-summer scholars will be asked to exhibit their research through poster presentation**. Each year, several scholar speaking slots will be available during the symposium. Scholar speakers will be nominated by a Mentor, and final selection made by the Foundation. One BSP Mentor may be invited to attend the Beckman Symposium each summer. When the Foundation hosts a virtual Symposium, it will be held online. When the Foundation hosts an in-person Symposium, related travel and lodging will be paid for and coordinated by the Foundation.

<u>First Summer Symposium</u>– Save the Date: **July 31-August 2, 202 in Irvine, Ca.** You will be notified by the Beckman Foundation directly for which symposium you will attend.

<u>Second Summer Symposium (dates TBD)</u>
Beckman Scholars completing their second summer of research will provide poster presentations during the Symposium alongside Beckman Young Investigators and Arnold O. Beckman Postdoctoral Fellows.

❖ **Scholar Guest Speakers**
Scholars may be nominated by their mentors to speak during the Symposium. An open call for Scholar nominations will be distributed to the Mentors of second summer Scholars in the months leading up to the 2026 Symposium. Scholars invited to speak may do so in lieu of a poster presentation.

Scholar Reports:

a. Report from each Beckman Scholar, submitted directly to the Foundation, independent of mentor review/revision, outlining:
    i. The institution's recruitment and process of selection as a Beckman Scholar
    ii. Research findings and discussion of other activities under this award
    iii. The collaboration between the Scholar, Mentor, and Mentor's lab
    iv. The advantages of the Beckman Scholars Award

v. Recommendations to the Arnold and Mabel Beckman Foundation regarding improvements to the Beckman Scholars Program
vi. Career and/or education plans (specify name of graduate institution, if applicable)
vii. Contact information

b. Scholar Value Statement: Describing Dr. Beckman's contribution to science and the impact of his innovations as they relate to the Scholar, their research and new discoveries.

Mentor Reports:

a. Report from the BSP Mentor outlining his/her involvement with the program, the Scholar and the results of the Scholar Mentorship Plan.

b. Mentor Value Statement: Describing Dr. Beckman's contribution to science and the impact of his innovations as they relate to the Mentor, their research and new discoveries.

Media: All media announcements regarding research supported by the Arnold and Mabel Beckman Foundation related to this award, including announcements, presentations, publications, openings, conferences, etc., must prominently acknowledge the support of the Arnold and Mabel Beckman Foundation. Institutions named as Beckman Scholars Program Awardees may announce the news only after submitting their signed/dated Award Letter to the Foundation. Copies of said publications must be sent to the Foundation within 60 days.

a. Social Media. Announcements and updates made through social media should acknowledge the Arnold and Mabel Beckman Foundation through utilizing #BeckmanFoundation and the following social media handles:
LinkedIn: Arnold and Mabel Beckman Foundation
Twitter: @BeckmanFnd
Instagram & Facebook: @BeckmanFoundation

b. Name Recognition. Recipients of the Award shall carry the name "Beckman Scholar" alone and not in conjunction with any other name. In publications and promotional materials, please refer to the foundation as: The Arnold and Mabel Beckman Foundation (referring to the Beckman Foundation is not correct), and to the award as: The Beckman Scholars Program or the Beckman Scholars Award.

Arnold O. Beckman Legacy:

"I have done more for science in general by making instruments available for thousands to use than what I could do in my laboratory by myself." - Arnold O. Beckman, PhD

Dr. Beckman always considered the greater good, whether it was through his scientific innovations, business dealings or personal relationships. The Arnold and Mabel Beckman Foundation holds steadfast to the directives of Dr. Beckman and his wife Mabel, his values, and the mission of the Foundation. Dr. Beckman believed strongly in reinvesting in science and research, supporting the up-and-coming scientists and looking for the future "Arnold Beckmans" of the world. In turn, the Foundation tasks each recipient of an Arnold and Mabel Beckman Foundation award to employ a similar "pay it forward" philosophy by promoting the legacy of Dr. Beckman, his values and his scientific contributions through their interactions in the scientific community and the world. Award recipients fulfill this task by serving as Dr. Arnold O. Beckman's living legacy and, as a means of continuing Dr. Beckman's mission for the sciences, recipients with demonstrated expertise in their area of research are called upon to serve on review committees and panels, lending their scientific expertise to the further development and evolution of the Programs supported by the Foundation.

Rules for Success Arnold O. Beckman, PhD

a. Absolute integrity at all times.
b. There is no satisfactory substitute for excellence.
c. Everything in moderation ... including moderation itself.
d. Only by taking risks do you make progress.
e. Never do anything to harm others.
f. Never do anything for which you will be ashamed later.
g. Don't take yourself too seriously.

Please let me know if you have any questions.

Congratulations again! Well deserved! We are so excited to work with you, [redacted]

On behalf of the Chemistry, Biochemistry, and Biological Sciences Programs,

Elaine Benaksas Schwartz, Ph.D.
Professor of Chemistry
Associate Dean of External Relations and Student Advancement

CC:
Molly McCarty, Laura Dart, Lauren Seaman
Dr. Jerry LaRue, Dr. Douglas Fudge, and Dr. Cecilia Lopez

Signed by the PI of the project. This is a great example of when AP would benefit from the submitter of the payment request including the PI's name on the non-PO form. It will help AP to know this fellowship letter is appropriate documentation.

Fellowship Non-PO Form

INVOICE DATE	INVOICE NO./DESCRIPTION OF CHARGE	ACCOUNT	FUND	DEPT ID	PROGRAM	PROJ/GRANT	CLASS	AMOUNT
6.5.2026	Invoice #: [redacted]							
	Beckman Scholars Fellowship	510035	160	4088	81003	501000	1095	$6,800
	Summer 2 2026 Payment							
	PROVIDE BUSINESS PURPOSE BELOW:							
	This is a part of the Beckman Scholars							
	Fellowship, this is the 2nd Summer payment for							
	this fellowship							

Again, AP only needs to confirm that amounts match and if the award letter includes the necessary information. SPS will determine if the fellowship is allowable on the project. FS Tax Compliance will determine if the payment meets the tax code definition of a fellowship.

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Proper Account Code Use

Selecting the proper account code is not only about correctly categorizing the expense (though that is in itself vital).

- F&A is applied to certain account codes and excluded from others.
- Consistency is again key; similar expenses should be charged to the same account.
  - E.g., ChatGPT subscriptions should always be charged to Software, not charged to Software once and then to Supplies next.
- Certain account codes trigger new workflow approvals that may be needed.
  - E.g., items identified as hazardous should be charged to Supplies Hazardous Materials so that Environmental Health & Safety will review the expense.
  - E.g., software should be charged to Software so that IS&T will review the expense.
  - E.g., equipment should be charged to Fixed Assets so that our FS Fixed Assets team will review the expense.

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Selected Accounts for a Closer Look

- 520040 – Grants Domestic Travel
- 520025 – Grants International Travel
- 520080 – Dues and Memberships
- 520045 – Non - Travel Meals
- 520125 – Research Publication Submissions
- 517005 – Supplies
- 517100 – Supplies Hazardous Materials
- 517115 – Participant Support Supplies

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Selected Accounts cont.

- 560010 – CU Expendable Furniture & Equipment
- 560015 – CU Expendable Computers & Equipment
- 560100 – Fixed Asset Transfers
- 560105 – Fixed Asset IS&T Transfers
- 530020 – Tools & Equipment
- 520010 – Participant Support Travel
- 510050 – Participant Support Fellowship Award
- 510035 – UG Fellowships/Awards
- 510037 – GR Fellowship Awards

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“Is this expense allowed on that grant?”

IT DEPENDS

AP is not responsible for determining if an expense is allowed on a grant. That is what the SPS Post-Award team’s review is here to do.

Key Takeaway

We are all partners in this. SPS, PIs, school/institute admin ops, Financial Services, HR, etc. Everyone must, and does, play a crucial role in the administration and compliance of sponsored projects.

Other Resources

- SPS Support by College/Unit
- OOR Policies and Guidance
- OOR Events - Workshops, virtual office hours, and more!
- Chapman Fiscal Policy
- Chapman Accounts Payable – FAQs, Forms, & Payment Request Info
- Chapman Financial Services Training Resources
- Chapman Purchasing Guidelines
- Chapman PCard

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Questions?

Contact us: sps@chapman.edu

- Virtual Office Hours (monthly)
  - Pre-Award: 2nd Thurs, 11 am–12 pm
  - Post-Award: last Tues, 9:30–10:30 am

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Visit our Events website: https://www.chapman.edu/research/events.aspx