Fordham University Office of Research Internal Funding Management Guide

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This manual is intended to assist Fordham faculty in accessing and utilizing their internal funding. Please note that, while the Office of Research is happy to assist, it is mainly the responsibility of each awardee to keep their own records of their awarded funds as well as how and when those funds were spent.

For a detailed handbook on doing research at Fordham University please visit the Office of Sponsored Programs webpage.

Office of Research Contact Information

Office of Research: Contact for internal funding, faculty fellowships, faculty research grants, budgets, and other matters concerning faculty research.

- **George Hong**, Chief Research Officer and Associate Vice President for Academic Affairs
  Phone: 718-817-0029
  zhong4@fordham.edu
- **Tihana Abiala**, Budgets and Operations Manager
  718-817-0028
  tsarlija@fordham.edu
- **Research Support Staff**
  718-817-0027
  research@fordham.edu
- **David Heston**
  Program Coordinator
  718-817-2608
  dheston@fordham.edu

Campus Mail can be addressed to Office of Research, Collins Hall, Box #6, Rose Hill

Office of Sponsored Programs (OSP)- Contact for external grants

- **Kris Wolff**, Director
  718-817-4086
  kwolff@fordham.edu
  *Psychology, Sciences, Law
- **Celinett Rodriguez**, Grants Office
  718-817-0850
  ccerodriguez@fordham.edu
  *Social Sciences, Business
- **Beth Torres**, Grants Officer
  718-817-0861
  btorres14@fordham.edu
  *Humanities, Religion
- **Laura Ebert**, Grants and Contracts Administrator
  718-817-4651
  ebert@fordham.edu
  *Grad Ed.

Campus mail can be addressed to Office of Sponsored Programs, Canisius Hall, First Floor

Institutional Review Board (IRB)- Contact for human subject research.

- **Michele Kuchera**, Manager
  718-817-0876
  mkuchera@fordham.edu
  irb@fordham.edu
  Collins Hall, Room B31

Campus mail can be addressed to Institutional Review Board, Collins Hall, Box #6, Rose Hill

Section I. Funding Opportunities Covered by this Manual

If you have received any of the internal funding awards or grants from the Office of Research, then your funds are subject to the reimbursement processes that are detailed in this manual. Please reference the Office of Research Internal Funding Webpage for additional information about specific funding programs.

Internal Funding	App. Deadline	Funding Amount	Purpose
Manuscript and Book Publication Award	Accepted on a rolling basis	Up to $2,000	To assist with publishing books and manuscripts. Applications for the MBPA will only be accepted after the completed manuscript has successfully completed the peer review process and has been formally accepted by a publisher. Funding preference will be given to publications submitted to university press publishers.
Faculty Fellowship	September 15th	One semester at full pay, full Academic Year at half pay, or summer stipend at $5,000	Awarded to tenured faculty and non-tenured tenure track faculty to carry out study and research required for academic development. See Statute §4-05.10 - Leaves of Absence
Faculty Research Grant (FRG)	January 15th; deadline subject to change.	$4,000 for research or $6,500 for external grant preparation	Research grants to assist full-time faculty to develop competitive research projects with potential for publication or submission to external funding agencies
Fordham at Columbia University Research Fellow	TBA	Up to $5,000	To promote and expand institutional research collaborations between the two universities.
Fordham-New York University Research Fellow	TBA	Up to $5,000	To promote and expand institutional research collaborations between the two universities.
Institutional Grant Preparation Fund	First-come, first serve basis	Up to $5,000	To support professional development activities by a tenured or tenure-track faculty who is preparing a proposal for an institutional grant.
Interdisciplinary Research Award (IRA)	January 16th; deadline subject to change	Up to $12,000	To provide pilot funds to stimulate interdisciplinary research in areas such as Digital Humanities/Digital Scholarship, Disability Scholarship, Healthcare, Integrative Neuroscience, International Social Development, Non-profits
Outstanding Externally Funded Research Award (OEFRA)	Nominations by February 1st; Supporting materials by February 15th Deadline subject to change	$1,000 honorarium and presentation at the Sponsored Research Day program	Designed to recognize faculty members who have received an externally funded research grant or fellowship within the past three years. Award areas: 1) science; 2) social science; 3) humanities; 4) interdisciplinary research; and 5) work in any of these fields by a junior faculty member.
Travel Grant Program	First come, first serve basis	Up to $500	To support travel costs associated with preparing or developing external grant, fellowship and scholarship proposals.

Section II: Frequently Asked Questions about Internal Funding

HOW DO I HIRE RESEARCH ASSISTANTS?

Research Assistants (RAs) must be paid directly by the University; you cannot pay them out of pocket and request a reimbursement to yourself. If a RA is already on the University's payroll (this does not include Work-Study or fellowship recipients), submit an **Employee Action Form** (leave the signature authorization and budget code lines blank) and an **LS 54** Notice and Acknowledgement of Pay Rate and Payday to Office of Research in Collins Hall, Box 6.

If a RA is not already on Fordham's payroll, she or he must complete the following forms before the first day of work. The person accepting these forms from the RA must have received training by Human Resources; if no one trained by Human Resources to handle this documentation is available in your department, contact the Office of Research for assistance (research@fordham.edu).

The following forms can be downloaded from the Human Resources webpage as well as additional forms here for international students:

Human Resources Forms
- **New Hire Form** (leave the signature authorization and budget code lines blank)
- **Direct Deposit Form**

U.S. Federal Forms
- **I-9** Employment Eligibility Verification Form
- **W-4** Employee's Withholding Allowance Certificate

New York State Forms
- **IT-2104** Employee's Withholding Allowance Certificate
  - For Employees claiming exemption from withholding for New York State personal income tax must complete **IT-2104-E** Certificate of Exemption from Withholding in lieu of **IT-2104**.
- **IT-2104.1** New York State, City of New York, and City of Yonkers Certificate of Non-residence and Allocation of Withholding Tax
- **LS 54** Notice and Acknowledgement of Pay Rate and Payday

If the student is a non-resident alien authorized to work in the United States, they must make an appointment with Susie Docarmo, Staff Accountant, to complete the W-4 Federal Tax Form and the IT-2104 New York State Tax Form and to discuss any possible tax treaties the United States might have with the country from which their Visa was issued. Please have them schedule an appointment as soon as possible by sending an email to docarmo@fordham.edu.

HOW DO RESEARCH ASSISTANTS REPORT THEIR TIME WORKED?

Research Assistants must submit timesheets electronically through the my.fordham.edu portal. If a Research Assistant encounters problems with reporting their time or with payroll, they should contact the Payroll Department in Faculty Memorial Hall or by e-mail at payrollinfo@fordham.edu.

The Office of Research Budget Administrator is the time sheet approver for all FRG RAs. You will be contacted by email to verify each RA's hours worked before time sheets are approved and processed at the close of each biweekly pay period. Payroll approval is a time-sensitive process, so please respond to these e-mails promptly.

HOW DO I HIRE CONSULTANTS?

Before the consultant begins work, complete a Checklist for Determination of Independent Contractor Status and ask the consultant to provide you a signed Fordham University Independent Contractor Agreement and IRS Form W-9. Please be sure that the consultant has filled in their full legal and permanent home address on the W-9 form and that they have provided an original (a copy is not sufficient).

The contractor's invoice should be made out to Fordham University, dated, and should include an itemized listing of services provided. If the consultant is paid by the hour, page, or other such easily delineable unit, a timesheet or schedule, signed by the Principal Investigator, must also be provided. Accounts Payable will not process a check request to pay a consultant's invoice without a completed checklist, Independent Contractor Agreement and signed tax form(s) with an original signature.

Upon receiving a consultant's invoice, complete a hard copy **Check Request Form** and submit the following materials to the Office of Research in Collins Hall, Box 6:

- the consultant's invoice,
- the original W-9 form or W-8BEN (foreign individuals only),
- the completed contractor's checklist, and
- the signed Fordham University Independent Contractor Agreement (must include consultant's fee amount).

How do I pay consultants?

Complete a **Check Request Form** and submit it to Office of Research, Collins Hall, Box 6 along with the consultant's invoice and other necessary tax documentation (see above.) The invoice should be dated and should include an itemized listing of services provided. If the consultant is paid by the hour, page, or other such easily delineable unit, a timesheet or schedule signed by the Principal Investigator must be provided.

**Please reference the section 'How do I hire consultants?' for further information.

How do I Request a Cash Advance for Paying for Research Supplies or Travel Expenses?

Any research project involving human subjects is subject to review and approval by the Institutional Review Board (IRB). After receiving IRB approval, you can request an advance in order to receive funds to administer human subject payments. Submit the following documents to Office of Research Collins Hall, Box 6:

a) Hard copy memo with original signature of Principal Investigator. The memo must include:
   i. Reason for advance including specific reference to research supported through the Faculty Research Grant award.
   ii. Total dollar amount requested.
   iii. Date funds will be needed.
   iv. Confirmation that any unused funds will be returned by check payable to Fordham University along with a reconciliation of funds used.
   v. If details of research participants are confidential, please note that complete detailed information on recipients of the funds will be securely filed with Principal Investigator.

b) Fordham Check Request Form:
   i. Payable to Researcher/Principal Investigator.
   ii. Budget numbers and signature line should be left blank. The Budget codes will be provided and signed by the Office of Research staff.

c) Statement of Employee/University Advances (available from Accounts Payable and in Section V of this handbook).

After receiving all documents, the request will be reviewed by Office of Research staff and submitted to the Controller's Office for processing.

How do I pay for research supplies or travel expenses under my grant?

All expenses must adhere to University policies and should correspond to the awarded budget. Even when not required, it is almost always preferable to have Fordham pay for expenses directly instead of paying out of pocket and requesting reimbursement. Not only does this reduce administrative burdens and make it easier to comply with University policies, the University's 501(c) 3 status provides tax savings to your grant.

**Procedures vary according to the type of expense involved: please reference the guidelines below for specific inquiries.

TO PURCHASE EQUIPMENT (COMPUTER, SOFTWARE, AND DATABASE ACCESS)

Equipment and software purchases of any kind must go through the Fordham Office of Procurement. Computer acquisitions (including leased computers, printers and other computer related hardware/software) must be approved by IT Acquisitions. To initiate the purchase request, e-mail research@fordham.edu a detailed description and/or vendor quote of the equipment, including any specifications. Research staff will create a new request through IT Acquisitions portal.

If the requisition request is in compliance with the University's computer procurement and maintenance policies, IT acquisitions will process them and transmit approved requisitions to the Office of Procurement for distribution to vendor. It is University policy that all goods purchased by the University, regardless of funding source, must be shipped to and received by the University. However, it is permissible to reship goods to the requestor after being recorded as a Fordham University asset.

TO PURCHASE SUPPLIES ($1,000 OR MORE)

Purchases of $1,000 or more require a purchase requisition. Complete a **Fordham Purchase Requisition Form (PO)** leaving the P.O. Number, budget number, and approval lines blank. Submit the completed purchase order to Office of Research in Collins Hall, Box 6.

TO PURCHASE SUPPLIES (LESS THAN $1,000)

Complete a **Check Request Form** (please make sure to include the vendor's Federal Taxpayer Identification Number [FEIN] on the form) and submit it to Office of Research along with the vendor's invoice, made out to Fordham University. The invoice should be dated and should include an itemized listing of purchases or services provided.

In some cases, a vendor will require a Purchase Order number even though Fordham does not require one. In these instances, you should prepare a **Limited Purchase Order (LPO)**, and submit it to the vendor. The vendor will be instructed by the LPO form to send you an invoice. When you receive the invoice, please sign off on the face of the invoice as "ok to pay" and submit to Office of Research with a check request form and a note requesting that the invoice be paid against the previously submitted LPO. Leave the check request budget code and authorization signature lines blank. The check request and invoice will be forwarded to Accounts Payable for processing.

Please note that it is always preferable to have Fordham pay vendors directly. In fact, if the payee is an individual, the payment must be paid directly by Fordham. However, if you need to pay out of pocket, you can request reimbursement for supplies less than $1,000. Keep all original receipts and tape (do not staple) each receipt to a separate sheet of 8½" x 11" paper. Submit receipts along with a **Check Request Form** or **Travel & Expense Check Request Form** depending upon the nature of the purchase (include your Fordham Identification Number on the form) to Office of Research in Collins Hall, Box 6. Requests for reimbursement must be submitted within 30 days of purchase.

TO PAY FOR TRAVEL EXPENSES

For travel expenses, you can either pay out of pocket and request reimbursement or request travel through Fordham's travel agency, Omega Travel. All travel must adhere to the University's Travel Policy.
When requesting reimbursement, keep all original receipts and tape (do not staple) each receipt to a separate sheet of 8½" x 11" paper. Submit receipts along with a brief memo and Travel & Expense Check Request Form (include your Fordham Identification Number on the form) to Office of Research in Collins Hall, Box 6.
To request travel arrangements through Fordham's authorized travel agency, Omega Travel, contact Christine Hall at chall@owt.net with your travel needs. Omega Travel will provide a draft itinerary, which you should submit with along with a **Travel Authorization Form** (available through Fordham's Duplicating Center or Omega Travel) to Office of Research in Collins Hall, Box 6. Once the booking is made, you will receive confirmation from Omega Travel. Omega Travel charges a fee for all bookings; if you plan to request travel arrangements through Omega Travel, be sure to budget for this fee.

Why was my Travel & Expense Check Request Form returned?

Requests for reimbursements can be returned for one or more of several reasons. In most cases, requests are returned due to missing or incomplete paperwork. Correct these errors and resubmit the request. Common errors include:

- Incorrect or missing forms
- Not including your Fordham Identification Number (FIDN) on the request
- Missing receipts
- Missing memo
- Arithmetic errors
- Missing signature

In other cases, requests are returned because they include expenses that are not included in your approved budget or allowable according to University policies:

- Expenses incurred outside of the grant period (July 1st – June 30th of the following year) cannot be reimbursed unless prior approval has been granted.
- The Faculty Research Grant does not cover some expenses, such as journal subscriptions, membership dues, and conference fees.

How to Request Early Access to Funding

Requesting an early access to funding is necessary in order to get more time to complete your project and spend the money under your grant. In order to request this access, please submit a memo by e-mail to George Hong, Chief Research Officer at research@fordham.edu detailing:

- The reason for the early access,
- the new anticipated start date, and
- any anticipated expenses.

Requests for early access must be filed at least 60 days before the start of the grant period, and you will be notified of the decision via e-mail.

Where do I Get Check Request and Travel & Expense Check Request Forms?

At this time, all **Check Request** and **Travel & Expense Check Request** forms are only available in hard copy. These paper forms can be obtained from the Fordham Duplicating Center at either the Rose Hill or Lincoln Center campuses or from your department office.

Please submit one copy of these forms with every request that you send to the Office of Research, as the paperwork cannot be forwarded to Accounts Payable without it.

How Do I Calculate Cents per Mile On My Own Car or On A Rental Car?

If you use your own car for research purposes you can calculate the reimbursement per mile according to the current Government Mileage Rate that can be accessed here.

If you rent a car for research purposes, please submit all receipts for the rental and for gas as reimbursable expenses to your internal funding account.

Where Do I Find Local and International Per Diem Rates?

Current per diem rates in the continental United States can be found here.
International per diem rates can be found here (please select the country and the city that you visited).

Please print out a copy of the per diem rates page and include this in your check request paperwork.

Where do I find foreign exchange rates?

Foreign exchange rate information can be calculated and found here.

Please print out a copy of the foreign exchange rates page and include this in your check request paperwork.

WHAT PAPERWORK SHOULD I INCLUDE IN MY CHECK REQUEST?

All check requests and travel & expense check requests need to include the following:

If payment is to be made to a vendor, please include:
-A hard copy check request form,
-A memo that details what the funds were used for and **which internal funding program** it should be credited to,
-A dated invoice from the original vendor that includes a remittance address.

If payment is to be made to you for an out of pocket expense, please include:
-A memo stating what the research funds were used for and **which internal funding program** it should be credited to,
-Original receipts taped onto an 8.5x11" piece of white paper, and
-Proofs of payment for any remittance amount, such as your credit card or bank statement.

**Please reference the section 'How do I hire Consultants?' for payment requests of that nature.

WHAT COUNTS AS PROOF OF PAYMENT?

Including proof of payment in your check request is necessary so that the expense can be traced back to an account for which you are a primary holder. Proof of payment is typically a credit card statement in your name that shows the remittance amount as well as the last four digits of the account. Please feel free to block out any other sensitive information of your account other than the necessary information.

HOW DO I REQUEST A CASH ADVANCE?

In order to request an advance payment for research, the following documents need to be completed and sent to: Office of Research, Rose Hill Campus Collins Hall, Box 6

i. Hard copy memo addressed to Dr. George Hong, Chief Research Officer, with original signature of Principle Investigator. The memo must include:
   a. Reason for advance including specific reference to the research project
   b. Total dollar amount requested
   c. Date funds will be needed
   d. Confirmation that unused funds will be returned by check payable to Fordham University along with a full reconciliation of funds used.
ii. Fordham check request form:
   a. Payable to Researcher / Principle Investigator
   b. Budget numbers and signature line **should be left blank**. The Office of Research will provide the budget codes and signature authorization.

After receiving all documents, the request will be reviewed by the Office of Research and submitted to the Controller's Office for processing.

IMPORTANT NOTE: If the advance is related to human subjects' participation in a research project, the project must have prior approval of the IRB. Contact IRB@fordham.edu.

HOW DO I RECONCILE A CASH ADVANCE?

A cash advance is reconciled by sending a brief memo, a log of spent funds as well as a check payable to Fordham University for any remaining amount to the Office of Research, Collins Hall, Box 6. Your documentation will be reviewed and submitted to Nancy Perri in Faculty Memorial Hall 525 (Controller's Office) for processing.

HOW DO I REQUEST A WIRE TRANSFER?

In order to request a wire transfer for research payment, the following documents need to be completed and sent to Office of Research, Collins Hall, Box 6:

i. Memo detailing the use of the research funds,
ii. An invoice from the vendor requesting to be paid via wire transfer,
iii. The vendor's bank information and wire transfer information,
iv. The vendor's **W-8BEN** or **W-8BEN-E** form.

How Do I Buy Gift Cards for Research Participants?

The Office of Research staff can request the gift cards from the Procurement Office on your behalf. Gifts cards for research participants can also be purchased from the Fordham University bookstores at Lincoln Center or Rose Hill campuses or from an outside party. Please e-mail your request to research@fordham.edu and specify the following:

i. The number of gift cards needed,
ii. the face value of each card, and
iii. a brief memo including the name of your research project, names of gift card recipients, as the names are maintained for Finance Office and possible auditing purposes.

**Please note if any of the gift card recipients are employees of Fordham University, employee ID numbers are needed to alert Payroll Department. If your study requires confidentiality, please provide reference numbers that are tied to the name.

In order to minimize risk/loss prevention, prepaid cards are normally delivered to attention of Angela Epstein in Faculty Memorial Hall and upon receipt of cards, Angela of Procurement Office will notify you to pick up the cards and sign for them.

If you choose to purchase gift cards from the University Bookstore, please note that the purchase must be authorized by the budget manager responsible for the budget to be charged. In order to request gift cards, please send your name, the number and the value of the cards to be purchased to research@fordham.edu. Please bring a valid Fordham University ID to sign for and collect the gift cards at the bookstore.

How Should I keep Track of My Internal Funding?

Keeping a log of your internal funding is useful for two reasons: 1) it will help you to know how much of your funds are left so that you can be efficient with your research, and 2) it will help remedy any budget discrepancies that may arise.

You should keep a copy or scan of each check request that you submit to the Office of Research. If your check request gets returned, you will need the paperwork for reference.

Keeping a log of your spending subtracted from your total awarded amount in an Excel sheet is perhaps the easiest way to keep track of your research expenses.

Section III. Forms & Procedures for Disbursing Internal Funding

A. Forms for Accessing Funds

Depending upon the nature of the expense, there are a number of different forms and procedures for accessing funds from your internal funding account. Most of the forms listed below are available in the Duplicating Centers at Rose Hill and Lincoln Center as well as in Department offices.

- **Travel Authorization Form:** This form should be used when you are requesting assistance with travel arrangements from Omega Travel agents.
- **Travel & Expense Check Request:** This form should accompany receipts related to travel (transportation, lodging, per diem, misc.). The faculty member who holds the internal funding award and is requesting the reimbursement must sign all Travel & Expense Check Request forms.
- **Purchase Requisition Form (PO):** This form should be used for the purchase of supplies and/or equipment costing more than $1000. Please forward all PO forms to the Office of Research for purchase

authorization. The Purchase Requisition form will be forwarded to Procurement Department for the purchase of the item.

- **Check Request Form:** This form should be used when you need to access funds for an expense incurred as a result of your research that is not travel-related, equipment-related, or connected to payment of a research assistant. An invoice should be attached to the check request, in which case the original vendor will be paid. This is the preferred method of payment; however, if circumstances require you to pay for this expense out of pocket, you may submit the check request and attach the invoice along with the original receipt. You will then receive a check issued to you. If a vendor requires a Purchase Order number you should prepare a **Limited Purchase Order (LPO)**, and submit it to the vendor.

**Please see Section V of this handbook for more information about these forms.

B. Procedures for Accessing Funds

Whenever you are requesting funds, please submit:

- a memo explaining the reason(s) for every expenditure;
- the original invoice from the vendor; and,
- a hard copy check request form with the payee's remittance address and Federal Taxpayer Identification Number (FEIN), social security number or Fordham Identification Number.

If you must request reimbursement for an out of pocket expense, please make sure to keep all original receipts and attach each with transparent tape to a sheet of 8½" x 11" bond paper. Please submit:

- the original receipts or invoice (if applicable),
- a memo explaining the reason(s) for every expenditure and,
- the appropriate hard copy request form.

Submit all documentation to the Office of Research (Collins Hall Box #6), where they will be examined, approved, and forwarded to Accounts Payable for processing. Please keep a copy of all documentation for your files.

**For more detailed information about the necessary documentation for research assistants, consultants and other expense requests, please reference those respective sections in Section IV of this handbook.

Travel Arrangements: If your research expenses entail travel, you may make your own travel arrangements (air, rail, and bus), purchase your ticket(s), and submit your receipts for reimbursement.

You also have the option of contacting the University's travel agent, Omega Travel (212-563-0949) and asking them to make your arrangements. The Research Office will then issue a Travel Authorization to Omega charging the grant account directly once we are informed of your plans.

Though both of these methods are acceptable, some faculty members prefer to make their own arrangements in the interest of both ease and economy. Omega may not always locate the least expensive fares and they also include a service charge that will be subtracted from your internal funding account in addition to the fare. Please be advised that the University will not issue reimbursement for your travel expenses until after the date(s) of travel.

**Please note that Omega is not authorized to prepay any hotel charges, however they are authorized to prepay flights.

C. Budget Management: Balancing and Adjusting Your Budget

You should keep track of your expenses and maintain a record of your internal funding balance as you submit receipts for reimbursement and/or requests of funds.

You may make minor adjustments to your original budget and/or change the allocations of your funding. However, the Office of Research must approve significant line item modifications. Please contact research@fordham.edu with any major changes to your budget.

For example, if you proposed to use $1500 for travel and subsequently decide that travel is not necessary to complete your research, you must contact the Office of Research prior to using the $1500 towards another expense. Along with your request for reallocation, you must submit a modified budget and justification of the new expense for approval.

In the case of major adjustments to your budget, your request may need to be examined by the University Research Council, especially if these reallocations imply a change in the research goals of the original grant proposal. The situation may arise when alternate sources of funding for a given research expense become available. Reallocation of these funds requires an explanation of how the new budget furthers the original or modified goals of the research project.

Section IV. Faculty Research Grant: General Information

A. Faculty Research Grant (FRG) Period

July 1st through June 30th of the following year (example: July 1, 2017 – June 30, 2018)

B. Funding Program

The Faculty Research Grant is primarily a funding rather than a reimbursement program, meaning that rather than incurring out-of-pocket expenses; you should make purchases through vendors that will bill the University directly. The University will, in turn, pay the vendors and subtract the amount from your Faculty Research Grant balance. However, should it be necessary for you to make your own purchases directly from the vendor, you may submit your receipts in accordance with the guidelines below and receive reimbursement for your expenses. Requests for reimbursement must be submitted within 30 days of incurring the expense.

C. Items and Services Covered by the Faculty Research Grant

Payment for Research Assistance, for secretarial help, and/or for subjects who participate in a study the applicant may be conducting is fundable if it is essential to the implementation of the research proposal.

Purchase of specialized equipment, supplies, data or related services may be allowed if these are needed to initiate a line of research that promises to attract subsequent external funding. All equipment or software purchased under a grant becomes the property of Fordham University.

If properly justified, necessary travel to libraries, archives, and/or other research sites is an allowable expense. Travel will be supported only when the applicant demonstrates that it will advance the research or enhance its prospects of attracting external support. Applicants may budget the federal per diem rate for research undertaken outside the New York area.

**Please reference section 'Where do I find local and international per diem rates?' for further information.

D. Expenses Not Covered by Faculty Research Grants

The Faculty Research Grant does not normally cover the cost of journal subscriptions, book purchases, expendables, services, equipment, attending conferences (e.g., conference registration, travel, food, and lodging) and/or membership fees to professional organizations if those costs could be line items in school or department budgets. You also cannot use a grant to pay your salary or the salary of other faculty members.

E. Early Access to Funding Request (s)

If a faculty member is unable to complete his/her research within the regular funding period, early access to funding may be requested by submitting a memo no later than April 30th of that same year explaining why this access is needed and the amount of funds involved. Requests for early access to funding may or may not be granted due to fiscal year limits on research budgets and the prospect for project completion. Please send access requests to George Hong, Chief Research Officer at research@fordham.edu.

*Please note that no extension requests will be accepted.
**Please reference section labeled 'How to Request Early Access to Funding' for further information.

F. Summary Reports

The FRG summary report is a single page form with a one page attachment that all grant recipients are required to complete and submit that summarizes the research work the recipient has completed using grant funds, including publications (both accomplished and anticipated), grant applications and awards, conference papers, etc. Final reports are due thirty days after the end of the FRG award year (typically by July 30th).

Please submit this report through the submission form located on the Office of Research webpage. Submission of these reports and documentation of outcomes is essential to continued support of faculty research and will be considered in future Faculty Research Grant applications.

Section V: Internal Funding Forms

On the following pages you will find the most commonly used Internal Funding forms. Hard copies of these forms may be obtained from a Fordham Duplicating Center or your department office and must be included in every payment request you send to the Office of Research.

CHECK REQUEST FORM

CustomMind® PAMA MBS 516.504.6300 SN 838-01

DO NOT WRITE IN BOX AREA

FORDHAM™ UNIVERSITY

BANNER

1400643422

1400643422

CHECK REQUEST

Payee	Social Security Number / Federal Ta... — Payee's SSN, FEIN, or Fordham ID Number
Address — Address where the check should be mailed.	FIDN
	Special Instructions — Please write your Internal Funding Award number here.
City State Zip	

ACCOUNTING INFORMATION:

Fund	Org	Account	Program	Invoice Number	Invoice Date	Amount
	Please leave this part blank.					

*Description/Purpose: | Total

Approval Signature(s):

Budget Administrator	Date	Area VP/Dean if $10,000 or more	Date
PRINT NAME EXT.			

Instructions:

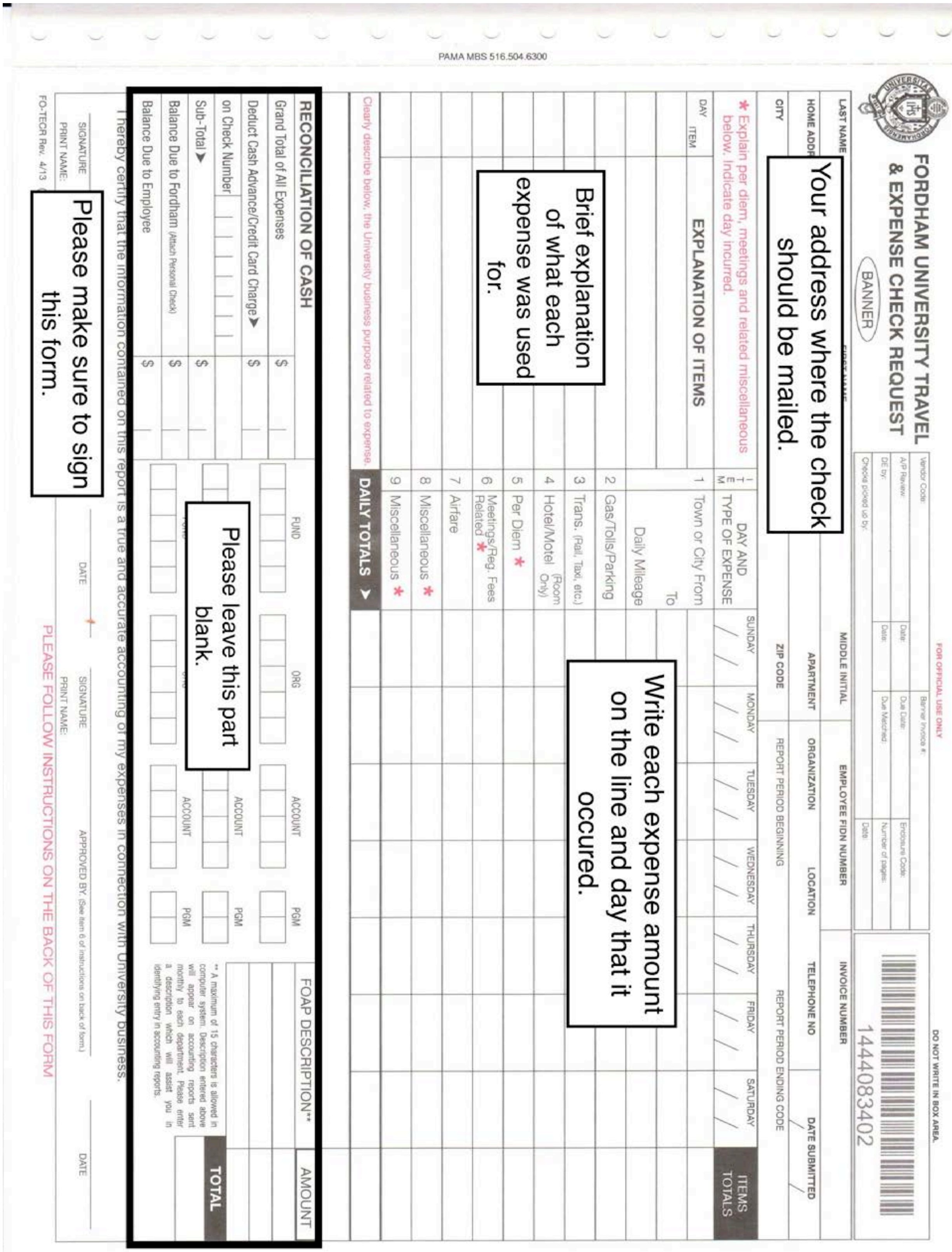
1. Use for payment for all services performed not acquired through an Official Purchase Order or Limited Purchase Order. For employee's travel expense reimbursement, use a Travel and Expense Check Request. Please type or complete in ink.
2. Must submit original invoices for expenditures of $25 or more. Originals of all receipts under $25, and copies of other invoices submitted with the request, should be retained by the submitting office for one year. All original receipts for Independent Contractors must be submitted. If receipts are not available, expense will be considered as service. Receipts smaller than 5″ × 11″ are to be mounted with transparent tape onto a clean 8½″ × 11″ paper.
3. If submitting more than four invoices for same vendor on check request, a Supplemental Form must be used and attached to regular check request.
4. Obtain required approval signatures (no signature stamps), and forward top original to the Controller's Office, Accounts Payable Department (FMH 525). Retain attached copy for your records. For additional copies of form please contact the Fordham Duplicating Center (Ext. 4922).

FOR OFFICIAL USE ONLY

Vendor Code:		
Banner Invoice #:		Banner Invoice #:
Banner Invoice #:		Banner Invoice #:
Due Date:		Enclosure Code:
A/P Review:		Date:
DE by:		Date:
Wire Transfer Approval:		Date:
1099:	Code:	Employee:
Date Matched:		Number of pages:
Check picked up by:		Date:

Form FO-CR100 (2 Part Rev 8/11)

TRAVEL AND EXPENSE CHECK REQUEST FORM



CHECK REQUEST SUPPLEMENTAL SHEET

FORDHAM UNIVERSITY

Document Number

Check Request - Supplemental Sheet

FRS

Payee ______________________

Accounting Information:

Line	Account No.	Subcode	Description	Invoice No.	Amount
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$

FO-XXX.1P (Rev. 7/1/03)

STATEMENT OF EMPLOYEE/STUDENT ADVANCES

FORDHAM UNIVERSITY

STATEMENT OF EMPLOYEE / STUDENT ADVANCES

Name: ______________________ **Title:** ______________

Department: ______________________ **Date:** ______________

Amount of Advance: $ ______________

I, ______________________, acknowledge custody of an advance in the amount stated above, for the sole purpose of transacting legitimate University related expenditures within the ______________________ department according to the guidelines set forth below. I understand that I am solely responsible for the proper control and accountability of this advance at all times.

I understand that this advance expires on ______/______/______ and that all documentation and remaining funds pertaining to this advance must be submitted to the Controllers Office 30 days after the expiration date in order to clear the full amount of the advance. Further, it is understood that if this advance is not cleared within 30 days of expiration, any outstanding amount will be deducted from my subsequent paycheck(s) until such time that the advance has been fully cleared or, a charge placed on my account.

1. The advance is to be used primarily for expenses incurred as a result of:
   ____
   ____
   ____
   ____

2. **The advance is NOT to be used for purchase of personal items, memberships, subscriptions, dues, furniture, equipment, personal services of employees or non-employees, or used as a source from which checks are cashed or loans are made or as a means to avoid or bypass any established purchasing procedures.**

My signature below signifies that I have received a check for the amount of advance and, that I agree to all terms stated on this document.

Employee/Student Signature: ______________________ Date: ____/____/____

Controller's Office use only

Controller/Associate Controller's Signature:

____

Date: ______/______/______ Charge to account(s): #______________________

PURCHASE REQUISITION FORM

FORWARD TOP COPY TO PROCUREMENT DEPT.
KEEP 2ND COPY FOR YOUR RECORDS.

NOTE: DO NOT FILL IN SHADED AREAS
THIS FORM MAY BE TYPEWRITTEN
OR HANDWRITTEN.

FORDHAM UNIVERSITY
OFFICE OF PROCUREMENT 441 E. Fordham Rd., Bronx, NY 10458-9993, Tel. (718)817-4910 Fax (718)817-4915

BANNER **PURCHASE REQUISITION FORM**

THIS IS NOT AN ORDER

PURCHASING CLOCK DATE

PURCHASE ORDER NUMBER	REQUISITION DATE MO DAY YR	PURCHASE REQUISITION NUMBER

REQUIRED DELIVERY DATE:

TERMS:

FOB ☐ DELIVERED ☐ FRT PPD & BILL BACK

DO NOT DUPLICATE
THIS IS A CONFIRMATION OF AN ORDER PLACED ON ______ DATE
☐ BY ______ FORDHAM EMPLOYEE
TO ______ VENDOR EMPLOYEE

RECOMMENDED VENDOR:

NAME ______

ADDRESS ______

______

______ ZIP ______

VENDOR TEL. NO. ( ) ______

VENDOR FAX NO. ( ) ______

VENDOR CONTACT NAME ______

VENDOR CONTACT PHONE ______

NOTES: FOR PROCUREMENT DEPT. USE ONLY.

Please leave this part blank.

FUND ORG PGM

DELIVER TO: FORDHAM UNIVERSITY

SCHOOL/DEPT. ______ TEL NO. ______ ROOM NO. ______

ADDRESS: ______ ATTN: ______

LINE NO	ACCOUNT	NO. OF UNITS	UNITS OF MEASURE	DESCRIPTION	ACTUAL PRICE/UNIT	ACTUAL TOTAL LINE AMT.

DELIVERY INSTRUCTIONS

SEE PO CONTINUATION PAGE(S) # ______ (INCLUDING THIS PAGE)

BUYER DATE

TOTAL ➡
TOTAL INCLUDES CONTINUATION PAGES

PREPARED BY: ______ TEL. NO. ______

APPROVED BY: ______ / Please leave this part blank. ______ DATE ______

Form FRPF (Rev. 4/13) PART ONE - CANARY - PROCUREMENT DEPARTMENT COPY PART TWO - GREEN - DEPARTMENTAL ISSUING COPY

POSTAGE STAMP REQUISITION FORM

POSTAGE STAMP REQUISITION

FORDHAM DUPLICATING CENTER AT ROSE HILL
441 EAST FORDHAM ROAD
BRONX, NEW YORK 10458
PHONE: (718) 817-4922
FAX: (718) 817-4925

BANNER

DATE RECEIVED / /   DATE POSTED / /

STAMP ORDER NO.

SO -

ALL STAMP ORDERS MUST BE PICKED UP FROM FORDHAM MAIL SERVICES FACULTY MEMORIAL HALL ROOM 129

PROCESSED BY:

Date/Time Stamp

① DEPARTMENT CHARGE

FUND   ORG

ACCOUNT   PGM

Please fill out completely. No request can be released without a Department Charge.

Stamps will only be issued as follows:
Sheets of **50** - .01
Sheets of **20** - .02, .05, .61, .98, $1.00, $4.95
Coils of **100** - .28, & .44 Cts. (Self adhesive)
All other denominations of stamps must be ordered specially.

ALL STAMP ORDERS ARE FINAL - NO RETURNS!

ITEM (SHEETS)	QTY. ORDERED	VALUE
.01 Cts		
.02 Cts		
.05 Cts		
.61 Cts		
.98 Cts		
$1.00		
Priority ($4.95)		
Item (Coils)		
100 / .28 Cts		
100 / .44 Cts		
TOTAL		

FO 330.2P (REV 07/1/10)

② CLIENT INFORMATION

PREPARED BY (NAME) - PLEASE PRINT

APPROVED BY (SIGNATURE)

DEPARTMENT   BUILDING   ROOM

TELEPHONE   DATE

REMINDER - MAIL CAN ALSO BE "METER" PROCESSED AT MAIL SERVICES: FMH, ROOM 129

GENERAL INFORMATION

1st Class
1 oz. - .44 cts.
Each additional oz. .17 cts. up to 13 oz.
Priority
14 oz. to 1 lb. $4.95
Air Mail (1 oz.)
Canada - .75 cts
Mexico - .79 cts
All Other Countries - .98 cts

Post Card Rates
Domestic - .28 cts

RECEIVED BY (Signature) ______________________

DATE: ________ / ________ / ________