

Using Your Research Award Funds

Congratulations on receiving a research award. **There are two ways in which you may access the funds from your research award:** 1) Katy Carr can process transactions for you using her University credit card. If you would like to purchase an item, renew/purchase memberships, subscribe to a periodical, etc. online or via telephone, please contact Katy at ext. 6084 and she will process the transaction. 2) You may submit a reimbursement request to Katy. If you purchase items using your own personal funds, please refer to the guidelines below regarding the reimbursement process.

Please submit all original receipts to Katy Carr in the Office of the Vice Provost for Research and Strategic Initiatives, Mail Code 4501, **within 120 days of any expenditure** (expenditures submitted after 120 days will be paid through Payroll as taxable income).

- Consumable items are reimbursable up to \$100 (i.e. office supplies, DVDs for instruction, art supplies, etc.), and only up to \$100. The one exception to this policy is the purchase of books; reimbursement requests for books may be for amounts up to \$250. If you need to purchase something for more than \$100 (except books up to \$250), it must be done using a University Purchasing card.
- Equipment and non-consumable goods (lab equipment, computer software, computer equipment, printers, furniture, etc.) **MUST** be purchased using a University Purchasing card, following University purchasing guidelines for procurement. You will not be reimbursed for an equipment purchase.
- All receipts submitted for reimbursement must be **original** receipts showing the **method of payment** (i.e., the last 4 digits of the credit card used) and amount paid. If the receipt does not show the method of payment, a copy of the credit card statement showing the charge or a copy of the cancelled check may be submitted along with the original receipt. Itineraries or invoices that do not show the method of payment and the purchaser's name on the form are not acceptable. A credit card statement alone will not suffice for reimbursement. If the appropriate documents cannot be submitted, please provide any documents that you do have along with an explanation. Receipts must be submitted no later than 120 days after the date on the receipt/invoice.
- Payments to individuals or companies for services rendered **MUST** be paid directly by Pepperdine. If you pay an external vendor, whether an individual or a company, you will not be reimbursed.
- Mileage is calculated as the mileage traveled minus the mileage driven on your normal commute to Pepperdine. If you travel from your home to LAX and back home, you can only be reimbursed for the roundtrip mileage to LAX minus the roundtrip mileage of your normal commute to and from Pepperdine.
- Travel expenses incurred while on a research trip or attending a conference can be reimbursable. **Original** receipts showing the **method of payment** (i.e., the last 4 digits of the credit card used) and amount paid must be submitted no later than 120 days after the date on the receipt/invoice. If the receipt does not show the method of payment, a copy of the credit card statement showing the charge or a copy of the cancelled check may be submitted along with the original receipt. Restaurant receipts must include the itemized food items in addition to the credit card charge (often two separate receipts).
- Books purchased at a conference are a reimbursable expense. Books purchased online or in local stores do not fall under this exception and reimbursements will be limited to \$250.
- Research funds used to pay student employees: you must contact Katy **prior** to the student beginning work. Students must complete hiring paperwork in order to be added to the Payroll system.

Along with your receipts, please include an itemized listing of all purchases made along with a brief explanation of how the purchases apply to your grant (this can be done by completing the form that is enclosed, or you may prepare a list using your own template, i.e. an Excel spreadsheet). After the receipts are recorded by Katy, they are sent to Accounts Payable.

If a payment request is submitted to Katy by Tuesday, the reimbursement check can be expected in about one week. If a payment request is submitted after Tuesday, the reimbursement check can be expected in about two weeks. Reimbursement checks are mailed to the individual's home address. Reimbursement requests that lack the appropriate receipts must be approved by the Provost's Office, which could further delay the reimbursement process.

Please call Katy Carr at extension 6084 with any questions or concerns about accessing your research funds. We wish you all the best in your research endeavors.