

How to Collect Student IEF Funds after Notification that Proposal is Approved

All Departments except Biology, Chemistry, Electrical and Computer Engineering and Mechanical Engineering

IEF grant funds may be collected only after an account has been set up in the student's name. This is completed in the Finance Department approximately 1 week after notification of the award.

Once the account is set up, funds may be collected in one of the following ways. All forms are prepared by Barbara Tricozzi in the Dean's Office (Science & Engineering Center, Room S-100) during the business hours listed below.

1. Purchases/Travel:

Purchases: Union College offers a credit card for temporary student use. If you would like to take advantage of this payment method, you will need to fill out a request form. Once this form has been turned in there is a **2 day waiting period** required to complete the paperwork before the card will be issued. When you return the card you must provide original receipts for all purchases made.

Travel: Union College offers a credit card for temporary student use. If you would like to take advantage of this payment method, you will need to fill out a request form. Once this form has been turned in there is a **2 week waiting period** required to complete the paperwork before the card will be issued. When you return the card you must provide original receipts for all purchases made.

2. Reimbursement for expenses incurred (using your own funds; personal credit card, cash, check).

Bring in original receipts for any expenses you incur. We will complete an expense form for reimbursement.

This form along with original receipts will be sent to Accounts Payable, and they will issue a check payable to you. The check will be mailed to your home address or campus box (whichever you prefer).

3. Human Subjects Reimbursement: Either use option #2 above, or for a Cash Advance, pick up a Cash Advance form from Barbara Tricozzi in the Dean's Office (S&E S-100). Take the form to the Cashier to receive cash. You must submit a list of signatures of study subjects to account for your use of the cash before additional funds are disbursed and by the end of the term in which the cash was advanced. Cash advances are limited to \$125 at a time.

***PLEASE NOTE: Office hours for business transactions (IEF funding) Are Monday – Friday 10:00-11:00 a.m. and 2:00-4:00 p.m.**

How to Collect Student IEF Funds after Notification that Proposal is Approved

Departments of Biology, Chemistry, Electrical and Computer Engineering and Mechanical Engineering ONLY.

IEF grant funds may be collected only after the departmental IEF Manager has received information about all the IEF awards in the department, approximately 1 week after you receive notification of the award.

Student Procedure:

1. Check with your departmental IEF Manager to make sure that your IEF funds are available.

<u>Department</u>	<u>IEF Manager(s)</u>
Biology	Peg Angie and Amy Kelley
Chemistry	Meg Howley
Elec.&Comp. Eng.	Lisa Quirk
Mechanical Engineering	Rhoda Becker

2. Check your proposal and award letter to be sure that what you are purchasing is what was approved by the IEF committee. NOTE: You may not make substitutions without prior approval of the Director of Undergraduate Research.
3. Make the purchase using the normal procedure in your department. Be sure to obtain receipts.
4. Submit the receipts to the IEF Manager.

Department Procedure:

1. When student awards have been finalized, the departmental IEF Manager and Department Chair will receive a spreadsheet containing student names, ID numbers and award amounts. IEF Managers will also receive a copy of the award letter each student received and a copy of their IEF proposal.
2. Keep track of student spending in the spreadsheet and collect receipts for purchases. If you need to send over original receipts to reconcile credit card purchases, please keep copies of the receipts for each student on file.
3. At the end of each academic term, calculate the IEF spending for each student and enter it in the yellow column. Total the amount requested and indicate the account number and object code that should be reimbursed by IEF.
4. Send the form to Barb Tricozzi (tricozzb@union.edu) by email and forward the receipts for all purchases to her.
5. A transfer will be made from the IEF account to the account indicated on the form within a few weeks of receipt of the completed form and receipts.