The following information may answer some of your general questions regarding office policies and procedures. Please feel free to contact me with any questions.

GENERAL OPR OFFICE NUMBER  609/258-4870
OPR FAX NUMBER  609/258-1039
GENERAL CRCW OFFICE NUMBER  609/258-5894
CRCW FAX NUMBER  609/258-5804
DONALD E. STOKES LIBRARY  609/258-5455
Administrative Staff

Noreen Goldman, Acting Director.
Nancy Cannuli, Associate Director.
Cara Carpenito, Academic Assistant to Marta Tienda.
Mary Lou Delaney, Academic Assistant to Nancy Cannuli, Tod Hamilton and James Trussell.
Kate Jaeger, Fragile Families Project Director for the Center for Research on Child Wellbeing.
Lynne Johnson, OPR Graduate Program Administrator.
Regina Leidy, Communications Coordinator, Program Assistant, Center for Research on Child Wellbeing, the Future of Children Journal.
Joyce C. Lopuh, Finance, Publications and Purchasing Administrator.
Kristen D. Matlofsky, Academic Assistant to Patricia Fernandez-Kelly, Douglas Massey, Jessica Metcalf, German Rodríguez, Brandon Stewart and Notary Public.
Kris McDonald, Program Manager, Center for Research on Child Wellbeing.
Tracy Merone, Academic Assistant to Kris McDonald, Jean Grossman, and Sara McLanahan, Center for Research on Child Wellbeing.
Judie Miller, Academic Assistant to Elizabeth M. Armstrong, Margaret Frye, Matt Salganik and Charles Westoff.
Robin Pispecky, Grants Manager.
Diana Sacke, Academic Assistant to Noreen Goldman, Heather Howard and Daniel Meuse.
Valerie Smith, Academic Assistant to Thomas Espenshade and the Urban Studies Program.

Please be aware that certain University guidelines are subject to the discretion of the Office

Business Expense Policy

Lynne Johnson – Students
Joyce Lopuh – Postdocs, Researchers, Visitors, Administrative, Library and Technical staffs
Tracy Merone – CRCW
Academic Assistants – Faculty

Our business expense, travel and reimbursement policies provide detailed guidance related to reasonable, appropriate, and allowable expenses including expenses charged against sponsored research grants. The expense incurred should be for a valid business purpose to fulfill the mission of the University or funding source.
Please consult the Business Expense Policy, University Credit Card Policy and the Travel Policy to determine whether a particular expense is an allowable expense. Concur is the University’s new tool for managing University-issued credit cards, registering travel requests, and requesting reimbursement for out-of-pocket expenses.

Receipts for all expenditures greater than or equal to $50 are required. Receipts for expenditures less than $50 do not need to be attached. However, these expenses will be carefully audited. Receipts should be clear to read. **Do not scan a receipt on top of a receipt.**

If a required receipt has been lost, a missing original receipt affidavit must be submitted. Please access the form library: [https://finance.princeton.edu/form-library/all-forms-a-z/index.xml](https://finance.princeton.edu/form-library/all-forms-a-z/index.xml)

**Necessary**
An expense is necessary if there is a valid business purpose required to fulfill the mission of the University. The primary benefit of a necessary business expense is the University, not the individual. A necessary expense is a minimum purchase or service required to achieve a valid business objective.

**Original Receipt**
The original merchant receipt or invoice issued by the supplier or service provider to document and substantiate the business transaction. A digital image of the original receipt is allowable provided that it is legible and the paper receipt is destroyed. Receipts should be clear to read. **Do not scan a receipt on top of a receipt.**

Please feel free to make notations on the receipt prior to uploading.
(example: lunch attendees and business purpose)

**Reasonable Expense**
Reasonable means the amount that normally would be spent in a specific situation. An expense is considered reasonable if it is not extreme or excessive and reflects a prudent decision and action to incur the expense. The Business Expense Policy does not define precise dollar amounts for what constitutes reasonable, because the reasonableness of an expense depends upon many relevant factors including the business purpose, the context, the source of funds, and the circumstances surrounding the expenditure.

**Substantiation / Justification of Receipts**
“Substantiation” describes the set of written documents that support an incurred business expense. Substantiation consists of the original receipt, notation of business purpose, names of persons in attendance (when applicable), and the Concur Expense Report for the incurred cost. Allowable business expenses must be properly and adequately substantiated in order to be paid or reimbursed.

**Expense Reimbursement Deadlines**
To be reimbursable, business expenses must be properly substantiated and submitted within certain time limitations. These time limitations determine both whether the cost may be reimbursed by the University as a business expense, and whether that reimbursement will be treated as taxable income to the individual.

The University requires reimbursable business expenses be substantiated and submitted to the appropriate department administrator **within 30 days** after the expense is incurred or after the last day of travel. The 30 day time frame allows the department adequate time to submit to the approver, return with questions, forward to a
second approver when necessary, then submit to the Office of Finance and Treasury to process payment for their 60 day deadline.

If substantiation occurs more than 60 calendar days after the expenses were incurred or after returning from travel, the expense reimbursement request must include an explanation for the delay. At the discretion of the Vice President for Finance and Treasurer, reimbursement requests beyond the 60-day limit may be approved. In all such cases, the reimbursement must be reported to the IRS as taxable income paid to the individual.

**Fiscal Year End Closing**

Please submit reimbursement vouchers for expenses prior to May 30th to your appropriate contact person by May 31st.

Expenses incurred from June 1st through June 13th should be submitted by June 14th. Completed vouchers after June 14th should be submitted as soon as possible, no later than June 17th.

Training Grant funding runs from May 1st through April 30th. Please submit expenses by April 30th.

It is imperative that you adhere to these dates to allow time to process and ensure that our finances are posted in the correct fiscal year.

PAA reimbursement vouchers should be submitted by April 15th to the appropriate contact person. Joyce circulates a more detailed memo in January with policy, travel and budget guidelines.

**Computing**

*Wayne Appleton*, Systems Administrator, Room 214, (appleton@princeton.edu). Wayne will be your first point of contact for computing help. Wayne’s responsibilities include configuration and purchase of workstations; server maintenance; account set-up on OPR’s Unix and Windows systems; and access to shared folders and network resources.

All OPR computer purchases should be authorized and purchased through Wayne to comply with University specifications and licensing. This applies even if you have been awarded funding.

All CRCW computer purchases should be pre-authorized by *Kris McDonald* (kemerson@princeton.edu) before obtaining Wayne’s approval.

Please note that computers and computer related expenses need to be requested no later than 4 months prior to the end of your appointment date.
Leaving the University
Whether purchased with University funds, endowments, grants or contracts, all equipment and software licenses remain the property of Princeton University. It is presumed that the equipment and licenses will be retained by OPR upon the departure of faculty, staff or students and assigned to a replacement employee or area at OPR. The one exception to the rule is that certain grants or contracts obtained through the University state that the equipment is the property of the Grantee. In this circumstance, the Grantee may allow the equipment to be transferred to the member’s new place of employment or take personal possession of the equipment. Please see Wayne for further information and procedures.

Please note that computers and computer related expenses need to be requested no later than 4 months prior to the end of your appointment date.

Concur Expense and Credit Card Policy

Expenses and travel are substantiated and reimbursed through Concur. Additional details may be found under the Travel Guideline section below.

Graduate Students

Concur is the University’s new tool for managing reimbursements for out-of-pocket expenses and registering travel requests. Students requesting reimbursement must submit their own requests online through Concur. Neither other students nor staff can submit requests on behalf of another person. Students are not being issued University credit cards at this time. For additional information please refer to http://travel.princeton.edu/graduate-students and the Travel section below.

Postdocs and Researchers

If approved, University credit cards are financial tools used by authorized individuals to enable certain types of payments while performing University business. Please refer to the University Credit Card Policy for additional details as well as http://travel.princeton.edu/faculty-staff.

Concur Travel and Expense Cards are the primary way to pay for travel and individual business expenses. They are designed and intended to be used to facilitate and support different types of financial transactions. Expenses should support an individual’s work that is being performed as part of University responsibilities. These may include expenses such as books, business meals, conference and research travel, and software to support an individual’s job duties, teaching, or research.

Approvals and Supporting Documents

Please attach all supporting documents to your air, hotel, or first line of your expense. Unfortunately Concur does not have an equivalent field for this purpose.
Documents may include DGS and grad school correspondence, conference announcement page and your participation page.

**Declined Expenses**

Any unapproved or otherwise unallowable expenses transacted with the credit card must be reimbursed to Princeton University in a timely manner. If the cardholder fails to reimburse in a timely manner the funds may be deducted from the cardholder’s pay or by an outstanding reimbursement.

**Director of Graduate Studies (DGS)**

*Alicia Adserà*, Director of Graduate Studies, 347 Wallace Hall, *(adsera@princeton.edu)*.  
Office hours by appointment.

*Lynne Johnson*, OPR Graduate Program Administrator, 210 Wallace Hall, *(ljohnson@princeton.edu)*.

A graduate student SharePoint site has been established as a Resource Portal. Access to this site is reserved for currently enrolled students. The site requires a Princeton University userid to authenticate. Elisha Cohen is the graduate student coordinator for this site.  
The URL is: [https://sp.princeton.edu/opr/student_wiki](https://sp.princeton.edu/opr/student_wiki).

Graduate students embarking on DGS-approved University-sponsored travel must complete a travel request in Concur within 30 days of the last day of travel. Reimbursable expenses are also substantiated through Concur. OPR requires receipts for all expenses except meals under $50. For additional information please refer to [http://travel.princeton.edu/graduate-students](http://travel.princeton.edu/graduate-students).

**Fair Use of Resources**

As a member of the University community (and more specifically as a member of OPR), you are provided with the use of scholarly and work-related tools, including access to computers, servers, software, printers, services, and campus telephones and in some instances voicemail. In general, your use of such resources should be for purposes that are consistent with the business and mission of OPR (and, more generally, of the University). Personal use of systems should be incidental and kept to a reasonable minimum.

According to University guidelines, use of OPR resources for non work related matters should not incur additional costs to the University (or department/program), should not prevent an employee from attending to and completing work effectively and efficiently, and should not preclude others with work-related needs from using the resources. OPR has not “policed” resource use and relied on an honor system. We would like to maintain this policy.
FAX Machines

OPR’s main FAX machine is located in Room 209, adjacent to room 208: (609) 258-1039.
CRCW also has a FAX machine in Room 267: (609) 258-5804.

Incoming — If a fax comes in for you, it will be delivered to your mailbox within a reasonable length of time.

Outgoing — You are welcome to send your own faxes. We have OPR cover sheets, or you can design your own. You need not ask for permission to use the fax. Pages should be placed face up. Dialing is the same process as your campus telephone: internal campus dial 8 + extension, inside area code (609) dial 9 + number; outside area code dial 9 + 1 + number. If you need assistance please ask one of our Academic Assistants.

A confirmation page will automatically print out after the fax has been sent.

First Aid Supplies

First Aid supplies are located in room 207, and in Regina’s office room 267.

For security purposes please only enter the rooms if the door is open. If closed please be accompanied by an Academic Assistant.

Human Subjects – Robin Pispecky

Job Postings

Mary Lou Delaney (md@princeton.edu) maintains distribution lists for email notices of job openings, which includes their link.

Please see Kris McDonald (kemerson@princeton.edu) for CRCW job postings.
**Kitchen**

CLEAN-UP — Janitors are not responsible for clean-up in the kitchen area or refrigerators. *Please clean up after yourselves.* This includes emptying your coffee grounds into the garbage and washing your dishes and silver and putting them in the drain. It also includes throwing out your food from the refrigerators before it becomes sour or moldy. Your cooperation in this matter will be greatly appreciated by everyone in the building.

If you are borrowing kitchen supplies please clean and return after use.

**Language Resources**

*Humanities Resource Center, Firestone Library*

The Humanities Resource Center provides resources, facilities, and support for the purposeful use of technology in teaching, learning, and research. The HRC support independent language study with a large selection of instructional materials and the appropriate viewing technology. The HRC manages the majority of the University’s video collection and video reserves.

[http://library.princeton.edu/vdl/languages/](http://library.princeton.edu/vdl/languages/)

[http://library.princeton.edu/vdl/](http://library.princeton.edu/vdl/)

Rosetta Stone Spanish, is available at OPR but cannot be checked out. Lynne Johnson has a copy that is available for loan.

**Library**

Website: [http://library.princeton.edu/libraries/stokes](http://library.princeton.edu/libraries/stokes)  General e-mail: piaprlib@princeton.edu

The Ansley J. Coale Population Research Collection is located in the Donald E. Stokes Library for Public & International Affairs on the lower level of Wallace Hall. The hours are posted on the library web page. The two Population Research Librarians are Joann Donatiello (jdonatie@princeton.edu, 8-1377) and Elana Broch (ebroch@princeton.edu, 8-5517). They are available for individual research assistance and classroom instruction. The Population Research Library Assistant is Tracy Hartman (hartman@princeton.edu, 8-4874). She is available to help locate and retrieve materials.

Occasionally, the library offers orientation and training. All OPR affiliates are encouraged to attend as the information provided enhances the educational experience. Group study rooms and an electronic classroom are also available. Signup sheets are outside the door for the group study rooms. The e-classroom can be reserved at [http://library.princeton.edu/libraries/stokes/reserve-room/guidelines](http://library.princeton.edu/libraries/stokes/reserve-room/guidelines).
Mail Services — Mary Lou Delaney

*Mary Lou* prepares outgoing mail, distributes incoming mail, and handles all mail forwarding. **Postage meter is not for general use – Administrative Assistant staff only.** All mail is sent first-class, domestic and foreign. Regina supervises mailings for CRCW.

There is one Campus mail delivery/pick-up around 1:30 pm. Please be patient if mail is late.

Stamps are not available. The postage meter is not available for personal mail.

Express Mail Services

As part of the new Prime Marketplace the University is replacing our standalone Fedex and UPS sites with a new shipping tool called **eShipGlobal** for both domestic and international shipping. This web-based tool will incorporate our contract pricing. All necessary shipping documents are printed right from the tool. Training tools are available through Prime.

If you have a University Travel & Expense Card you are able to process your shipment yourself and it will be billed directly to your card. Once the shipper has substantiated and submitted the mailing via Concur, the expenses will be routed to the approver.

OPR does not have an open policy on express mailings. All packages require the chartstring specific to the sender and project as well as the business purpose of the mailing.

Moving Allowance

*Joyce Lopuh* – OPR

*Tracy Merone* – CRCW

Moving allowance will be determined on an individual basis by Nancy Cannuli and Kris McDonald.

Please see the [Domestic Moving Expense Policy](#), which is administered by the Human Resources Department.

Notary Public — Kristen Matlofsky

*Kristen* is a registered Notary Public and will certify both professional and personal documents. There is no charge.
Notestein Seminar Series — Noreen Goldman, Douglas Massey and Marta Tienda

Mary Lou and Kristen organize scheduling, catering and distribution lists.

Seminars are held on Tuesdays from 12:00 to 1:00, Wallace Hall conference room 300.

Office Supply Purchasing and Dispensing

Joyce Lopuh – Purchasing Coordinator OPR office supplies
Judie Miller – Assistant Purchasing Coordinator OPR office supplies
Regina Leidy – Purchasing Coordinator CRCW office supplies

OPR provides a limited range of office supplies. These supplies are to be used for OPR research, classes and other approved functions. Special order or large quantity requests should be emailed to Joyce (jclopuh@princeton.edu). Please specify in your request a detailed description of the item, size, color, amount, etc.

Routine supplies are purchased through Office Max the University’s contracted vendor in the Marketplace. You may include in your email the item number of your supply order.

Office supplies are located in the supply closet across from the kitchen; office use only please.

Miscellaneous and higher end items (not located in the hall closet) may be available in-house upon request through Joyce and the Academic Assistants.

Open Space Policy

Please be considerate of the working environment by keeping conversations and cell phone use to a minimum. In particular, the kitchen and the common area outside of the kitchen.

If you are gathering for lunch or a meeting you may use conference rooms 242 and 290 (if available) with the doors closed. Please contact Mary Lou (md@princeton.edu) to reserve.

The lobby outside of Stokes Library is a designated University open space.

Photocopying and Scanner – Ikon Copier in Mail Room

Kristen Matlofsky – General Information, Scanner Support, Program Email Address, Troubleshooting
Mary Lou Delaney – General Information, Troubleshooting
Joyce Lopuh – Copier Codes, Supplies  
Regina Leidy – CRCW Copier Codes

Copier instructions: Punch in your CODE on the key pad, press OK key, enter number of copies needed, press GREEN start key (may need to press 2x for more than one copy). To EXIT your code press the ORANGE CLEAR/STOP key 2x then the INTERRUPT key (top right). If you forget to log out, the copier will automatically log you out in approximately 90 seconds.

Ricoh Scanner/Email instructions: Press SCANNER on left side of panel, press MANUAL ENTRY (in middle of screen above yellow highlighted FREQUENT tab), enter EMAIL address, place paper vertical on screen, press START. When complete press Copier tab on left side of panel to return to Copier Mode. Please see Kristen Matlofsky if you would like your email address programmed into the copier.

Also, Stokes Library has a book scanner in Room 013A. The scanner has a flat bed, is very user friendly with clear instructions and saving options.

The small Xerox copier adjacent to Room 208 is restricted for faculty and staff use only.

Postdoc Research Funds

Joyce Lopuh – OPR  
Kris McDonald – CRCW  
Wayne Appleton – Computing Equipment

Postdocs receive supplemental funding for OPR related research. If an expense is necessary, reasonable, and appropriate, the University considers it an allowable expense as referenced in the Business Policy above. Expenses are charged or reimbursed through Concur, the University’s new financial system.

Postdocs receive supplemental funding for OPR related research. If an expense is necessary, reasonable, and appropriate, the University considers it an allowable expense as referenced in the Business Policy above. Expenses are charged or reimbursed through Concur, the University’s new financial system.

The purchase of books, memberships, software, travel etc. should tie directly to OPR research. The concept of who benefits most, the individual or the University should be used in questionable cases.

Meals: Actual daily expenses claimed should be reasonable and appropriate and typically should not be more than $75 for domestic travel and $125 for international travel. The University considers a reasonable rate of $10 for breakfast, $20 for lunch and $45 for dinner. Receipts are not required if under $50. You may combine breakfast and lunch on one approval line for $30.

All computing equipment must be approved and purchased through Wayne. Please provide Wayne with the correct chartstring authorized by Joyce or Kris. Purchased items may remain in the possession of the postdoc after your appointment ends. Please note that computers and computer related expenses need to be requested no later than 4 months prior to the end of your appointment date.

OPR funding runs from July 1st through June 30th. Training Grant funding runs from May 1st through April 30th. No carry over.
Additional funding is provided to those attending PAA. If your expenses exceed this additional amount, you may use your supplemental funding to cover all costs.

**Printing Services**

*Lynne Johnson* – Students, Business Cards  
*Joyce Lopuh* – Posters, Receipts, Miscellaneous, Business Cards  
*Tracy Merone*— CRCW, Business Cards  
*Academic Assistants – OPR*

All printing requests require the chartstring specific to the sender and project.

**Business Cards**

Personalized business cards may be ordered through Printing and Mailing:  

You will be instructed to fill out Princeton’s standardized template. Please see Lynne, Joyce or Regina for the billing chartstring.

**Poster Printing**

Please see *Joyce, Lynne or Tracy* for the chartstring for interdepartmental billing.  
Posters can be printed at the Princeton Institute for the Science and Technology of Materials located nearby in Bowen Hall. You may schedule an appointment with Don Schoorman (8-0018),  
[http://www.princeton.edu/prism/info/poster-printing/](http://www.princeton.edu/prism/info/poster-printing/). Your Princeton ID is required during the appointment. OPR has generously approved to cover the costs of poster printing and mailing.

Posters are also available through University Printing and Mailing:  
[http://www.princeton.edu/printing-mailing](http://www.princeton.edu/printing-mailing)  
Please submit the printing invoice with your travel voucher for reference. Reminder to purchase appropriate size mailing/handling tubes if not available at OR.

Additional information on **PAA posters and mailings** will be circulated from Joyce by January 2016.
Professional Development Committees — Joyce Lopuh

Each year the postdocs and students receive departmental funds to foster professional and educational development.

Theresa Andrasfay, Sarah James and Celeste Marin will serve as chairs for the students.

Nicole Smith will serve as chair for the postdocs.

The purchase of goods or services, reimbursements, and substantiating expenses will be processed by the postdoc or student through Concur and approved by Joyce.

Inviting researchers or students from another department is allowable. In all cases, a list of attendees including titles and affiliation (<10), or identification of a discernable group (>10), and the business purpose of the meeting needs to be provided along with the receipts in order to be reimbursed.

If another department is contributing to the cost please note the amount and department chartstring and include the specifics in the comment field.

Keep in mind that OPR and Finance closely audits all expenses so I can’t stress enough the importance of submitting reasonable expenses with proper substantiation.

Conference Meals

Actual daily meal expenses claimed should be reasonable and appropriate. The University considers a reasonable rate of $75 per day: $10 for breakfast, $20 for lunch and $45 for dinner per person. Receipts are not required when under $50.

The purchase and use of alcohol places significant legal exposure on the University. Therefore the use of alcohol for business meals should be kept to a minimum of $5 to $15 per person (included in the budget above).

It would be reasonable to provide simple snacks and beverages when meetings are scheduled to exceed 2 hours.

Unallowable (samples)

- Commuting
- Credit card fees or late payments
- Gifts or gift cards
- Goods or services for personal use
- Social Events
- Spouse/partner meals
- Taxi’s – repetitive or exceeding normal University policy
Publications

Joyce Lopuh – (jclopuh@princeton.edu) OPR Publication Databases, NIH PMCID Compliance
Joann Donatiello – (jdonatie@princeton.edu) NIH PMCID Compliance
Kate Jaeger – (kjaeger@princeton.edu) CRCW Publication Databases, NIH PMCID Compliance

GRANT ACKNOWLEDGEMENT

OPR is primarily funded by an NIH Center Grant and also by an NIH Training Grant. Each publication, press release, or other document about research supported by an NIH award must include an acknowledgement of NIH award support and disclaimer such as:

NIH Center Grant:
“Research reported in this publication was supported by The Eunice Kennedy Shriver National Institute of Child Health & Human Development of the National Institutes of Health under Award Number P2CHD047879. The content is solely the responsibility of the authors and does not necessarily represent the official views of the National Institutes of Health.”

NIH Training Grant:
“Research reported in this publication was supported by The Eunice Kennedy Shriver National Institute of Child Health & Human Development of the National Institutes of Health under Award Number T32HD007163. The content is solely the responsibility of the authors and does not necessarily represent the official views of the National Institutes of Health.”

If both NIH Center Grant and Training Grant (when applicable):
“Research reported in this publication was supported by The Eunice Kennedy Shriver National Institute of Child Health & Human Development of the National Institutes of Health under Award Number P2CHD047879 and Award Number T32HD007163. The content is solely the responsibility of the authors and does not necessarily represent the official views of the National Institutes of Health.”

NIH PUBLIC ACCESS POLICY COMPLIANCE

Everyone affiliated with OPR, including all faculty, faculty affiliates, students, postdocs, researchers and staff, is required to comply with the NIH Public Access Policy so that OPR retains its eligibility for funding. Failure to comply can impact OPR’s ability to obtain grants in the future.

What is the NIH Public Access Policy?

The NIH’s Public Access Policy requires that all papers resulting from NIH-funded research must be deposited in the National Library of Medicine’s PMC database (an archive of full-text biomedical journal papers available online without a fee) within 12 months of publication. The policy applies to all peer-reviewed articles (including their graphics and supplemental materials) accepted for publication on or after April 7, 2008, arising in whole or part from direct costs by the NIH. Every manuscript written at OPR, or based on data collected at OPR,
falls under this mandate, even after an individual leaves the University. The policy requires that these articles be accessible to ensure that the public has access to the published results of NIH funded research.

The policy does not apply to: book chapters, commentary, letters, book reviews, non-peer reviewed articles, or articles written before April, 2008. Please note that even though these publications do not require PMC compliance, OPR reports them to NIH and they are included in OPR’s Annual Report.

How do I comply?

Information about whether the journal will permit you to comply with the policy, and how to do it, is usually available on the journal or publisher’s web page. If you need help finding this information, please contact our librarian Joann Donatiello (jdonatiele@princeton.edu).

The optimal time to arrange for submission is when sending the final manuscript to the Journal. A sample letter is available for you to include. Either the journal will do the submission for you or you will do it. The process is different for each path and depends upon the publisher and the agreement you made when submitting the final manuscript to them. For a list of journals that will submit a paper for you, see the NIH web page. Please note even if a journal is on this list, you must confirm the arrangement with the publisher.

https://publicaccess.nih.gov/select_deposit_publishers.htm

Some journals may contact you to pay an open access fee. It is not necessary to pay an open access fee to comply with the NIH mandate.

Upon submission, you will be given an NIHMS number, which will eventually convert to a PMC ID number. It is essential that you give Joyce this number promptly so she can include them in our reports to NIH.

****Please note that a PubMed ID number is not the same as a PMCID number****

If you are submitting for yourself, see the box below. Please contact Joann prior to submitting retrospective articles (back to April, 2008). In almost every case, you may not submit the final published version (PDF) of the article.

<table>
<thead>
<tr>
<th>To submit an article to the NIH PMC database, you will need the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A full citation: author, article title, journal title, date of publication, volume and issue number if available.</td>
</tr>
<tr>
<td>• The original manuscript (in a MS word file), including the title page, the article itself and all attachments such as graphs or charts.</td>
</tr>
<tr>
<td>• The grant number (see Joyce or Robin).</td>
</tr>
</tbody>
</table>

Once you have all of the information above, set up a MY NCBI account and follow the steps for submitting a new article. The PI on the Center Grant and the Training Grant is Doug Massey. Both Doug and you will receive e-mails asking for approval of the submission at various stages.

If you have any questions about complying with the NIH Public Access Policy, our librarian Joann Donatiello will be happy to assist you.

**OPR Publication Database – Joyce Lopuh**

Joyce maintains a separate database of all OPR publications and presentations for our Annual Report and will send out requests for updates periodically. The preferred method of submission is to send your CV annotated with information about NIH Public Access Policy compliance for each publication (i.e. NIHMS number, PMC ID number, policy not applicable and the reason, etc.) It is expected that the annotation will reflect the most current compliance status as the NIHMS number will eventually convert to a PMC number.

**Receptions/Conferences**

*Conference Room Scheduling* — Please contact Mary Lou ([md@princeton.edu](mailto:md@princeton.edu)) to schedule Conference Rooms A and B (rooms 242, 290) and the computing lab for classes and meetings.

Regina Leidy ([rleidy@princeton.edu](mailto:rleidy@princeton.edu)) and Tracy Merone ([tmerone@princeton.edu](mailto:tmerone@princeton.edu)) coordinate CRCW receptions and conferences. Please contact Tracy to schedule Conference Room C (room 275).

Montara Tabb from the WWS schedules the Seminar Room in 300 Wallace Hall. When submitting catering or room requests, please use the room reservation and catering forms that can be found on the web at [http://wws.princeton.edu/intranet/business-and-facilities/forms/wws-room-reservation-form](http://wws.princeton.edu/intranet/business-and-facilities/forms/wws-room-reservation-form)

Please contact Mary Lou if you need assistance.

The link below may be useful if you are interested in scheduling a conference room on campus: [http://registrar.princeton.edu/classroom-information/index.xml](http://registrar.princeton.edu/classroom-information/index.xml)

**Recycling — Please use appropriate containers around the building**

**Research Grant Proposals — Robin Pispecky and Nancy Cannuli**

**Telephones**

Mary Lou Delaney – OPR Coordinator, Conference Telephone
Regina Leidy – CRCW Coordinator
Joyce Lopuh – Authorization Codes, Auditor

Mary Lou ([md@princeton.edu](mailto:md@princeton.edu)) updates the OPR office and home information lists. Other services may include maintenance requests and emergency contact numbers. Please contact Mary Lou if you would like to
borrow our conference telephone. You may contact Joyce or an Academic Assistant if Mary Lou is not available.

**Acceptable Use Policy:** This applies to everyone at OPR.
A moderate amount of business and personal telephone calls are allowed per month. Please note that routine audits will be conducted for cost as well as minutes used per month. Infractions of the OPR telephone policy will be addressed on an individual basis. Individuals may be required to reimburse the department for excessive costs.

If there are extenuating circumstances that necessitates a high number of calls, the individual must submit to Joyce written approval by the faculty member or by Nancy the Associate Director. In this instance an authorization code for a specific research project may be assigned.

**Travel Guidelines**

* Lynne Johnson – Students
* Joyce Lopuh – Postdocs, Researchers, Visitors, Administrative, Library and Technical Staffs
* Tracy Merone – CRCW
* Academic Assistants – Faculty
* Mary Lou Delaney – Notestein Seminars

*Please be aware that certain University guidelines are subject to the discretion of the Office*

Travelers should familiarize themselves with the responsibilities they assume when traveling on University business. Routine University guidelines are summarized below. For additional clarification you may access: [Travel Policy](#).

Submit your request for reimbursement within 30 days of incurring the expense. After 60 days, any reimbursement will be reported to the IRS as taxable income. For additional details, please see the [Reimbursement Policy](#).

Graduate Students should refer to the DGS memo for particulars on conference funding. OPR will support students through their 5th year at OPR.

Functionality in Concur pre-populates many fields for you, or prompts you to enter information that informs the Business Purpose, such as names of attendees for group meals. These available fields vary depending on the expense type.

Please attach all supporting documents to your air, hotel, or first expense line. Unfortunately Concur does not have an equivalent field for this purpose. Documents may include DGS and grad school correspondence,
conference announcement page and your participation page. Receipts should be clear to read. **Do not scan a receipt on top of a receipt.** Please feel free to make notations on the receipt prior to uploading (example: lunch attendees and business purpose).

*Documenting the “Business Purpose” for Reimbursements*

On all Concur Expense Reports — whether the expense is for conference registration, research supplies, or travel — you must provide justification for the purchase. It’s essential that reviewers, approving managers, and auditors understand the circumstances under which you made the purchase and why it was necessary.

Your brief, accurate, and complete description of the “Business Purpose” should be clear enough that a person outside the University could read it years from now and have no question about the eligibility of the expense for reimbursement. The Business Purpose field should include:

- who received the benefit from the expenditure;
- what purpose the expenditure served, why the expense was necessary, or how it furthered the University’s goals; and
- where and when the expense took place.

*Examples:*

**Business Purpose:** Individual’s Name, Conference Name or Award Type, Fiscal Year

(ex: B. Pitt, PAA Annual Conference presenting, Washington D.C., April 2016)

**Report Header/Name:** Same as Business Purpose.

**Trip ID:** Same as Business Purpose (limited characters - last name, abbreviated purpose, location)

Please record the same Business Purpose description in the Concur Report **Header** and **Trip ID**. These categories feed different financial reports. As much detail as you can fit the better, beginning with your name.

*Comments*

Concur does not save your comments after the report has been approved for payment. Attaching a brief (or not so brief) memo is very helpful, especially since the Business Purpose has limited character space. A separate memo may adequately describe what purpose the expenditure served, why the expense was necessary, or how it furthered the University’s or research project’s goals.

*Miscellaneous Field*

Only use if no other category is available, even slightly. Concur may translate a miscellaneous expense to an unsuitable code (example: lodging at a hostel, you may use the hotel category).
**Quick Expenses**

The Quick Expenses entry allows users to quickly enter multiple out-of-pocket expenses to a Concur report in a convenient grid format. Quick Expenses allows you to enter the transaction date, expense type, business purpose, city, and dollar amount for a number of items at one time. Use the blue (+) sign to duplicate rows and easily edit dates and dollar amounts as needed. After saving, you may be prompted to attach receipts to expenses over $50.

The Quick Expenses tool is often useful when entering multiple individual meal expenses at one time. Most notably, the requirement to include a vendor name for the meal has been removed. Simply enter one row and use the plus sign to duplicate it, edit and save.

**Air Travel**

Reservations should be made at least 14 days in advance to ensure the most convenient and cost effective fares. Transaction fees associated with business travel reservations are allowable.

**Class of Service**

Travelers must purchase the lowest available economy class airfare that meets the needs of the business trip. Travelers may upgrade the level of service at personal expense or by using their “frequent flyer”.

**Airline Requirements for Federally Funded Sponsored Research Projects**

Under the Fly America Act (FAA), government regulations require the use of a U.S. air carrier when traveling outside the U.S. In some instances, a non-U.S. air carrier may be used if it meets one or more of the exception criteria listed in the Federal Travel Regulation (FTR) guidelines section 301-10.135-138. The Waiver of Fly America Act lists all available exceptions, which include Code Share and Open Skies Agreements. Note that some federal agencies consider Canada, Mexico, and/or U.S. Territories as “foreign”. If the award terms and conditions do not specifically indicate that travel to/from Canada, Puerto Rico, or Mexico is considered as domestic travel, the trip is considered to be foreign travel.

**Code Share Agreement**

The Code Share Agreement provides for compliance with the Fly America Act if the U.S. air carrier is the ticketing agent and issues a flight on a non-U.S. air carrier. The payment for the airfare must be made to the U.S. air carrier. If a non-U.S. air carrier is the ticketing agent, the flight is considered a non-U.S. air carrier flight and is in violation of the Fly America Act.

**Open Skies Agreements**

Open Skies Agreements provides that qualifying travelers, whose travel is supported by federal funds, may travel on airlines from the European Union, Australia, Switzerland and Japan as well as U.S. Flag Air Carriers. Travel being reimbursed using Department of State (including all of the Department of Defense) funding is not eligible for the Open Skies Agreements exception.
**Baggage**

Charges for baggage that are reasonable and appropriate for the purpose and length of the trip are allowable.

**Booking Reservations**

Travel arrangements may be made through the Concur Travel online booking tool or by calling the University's travel management company, Carlson Wagonlit Travel at (866) 640-3294
princeton.us@contactcwt.com

**Emergency Contacts**

The University's Travel Care Program is an important resource to help keep our travelers safe and secure. Traveler's should complete and maintain their profile information, including mobile phone numbers and contact details, within the Concur Travel and Expense system. Additionally, graduate students must register all University sponsored international travel.

**Emergencies When Traveling Overseas**

The University has contracted with International SOS to provide worldwide access to emergency and medical assistance services 24 hours a day. International SOS services are designed to help you with access to medical, personal, travel, security, and legal services when away from home. Call International SOS at any time to gain assistance with simple or critical matters.

**Hotels**

Reservations may be made online through Concur Travel or by contacting Carlson Wagonlit Travel. When booking a hotel for a conference where there is a special conference rate, the reservation may be made directly with the hotel.

The itemized hotel bill must always be included on the expense report.

**Hotel Class and Rooms**

The class of hotel must be reasonable and appropriate for the business purpose and location. University travelers should stay in standard rooms only. Suites and other upgraded rooms are not allowable expenses. If there is a valid business need for a non-standard room, the business purpose must be documented on the expense report.

**Rate Guidelines by Location**

The following are guidelines for maximum nightly rates by location, (note: budget restrictions may apply). If the nightly rate exceeds the amount below, the business purpose must be clearly documented on the expense report. This list will be reviewed and updated periodically.
United States
--$350 New York City, San Francisco
--$300 Washington D.C., Boston
--$250 All other U.S. locations, except Princeton
--$190 Princeton, except during Reunion/Commencement week

International
--$350 Delhi, Johannesburg, London, Mumbai, Nairobi, Paris, Rome
--$300 All other international locations

Meals
Actual daily expenses claimed should be reasonable and appropriate and typically should not be more than $75 for domestic travel. The University considers a reasonable rate of $10 for breakfast, $20 for lunch and $45 for dinner. Receipts are not required if under $50.

$125 per day is allowable for international travel.

Alcohol
The purchase and use of alcohol places significant legal exposure on the University. Therefore the use of alcohol for business meals should be kept to a minimum of $5 to $15 per person (included in the budget above).

For travel greater than 30 days, a travel allowance of up to 50% of the federally published per diem rates for meals and incidental expenses may be claimed, and receipts are not necessary. Use the domestic or foreign per diem rates applicable for the city and dates of travel. Incidental expenses included in the domestic per diem rates are tips for services (e.g. porters, baggage carriers, bellhops, and hotel maids). International per diem rates include laundry and dry cleaning in addition to tips for services. If a travel allowance is claimed, additional expenses for meals and incidentals will not be permitted.

Personal Auto - Mileage Reimbursement

When a personal car is used for transportation between home and station or airport in lieu of a taxi or limousine, mileage and parking costs may be charged if the cost does not exceed the cost of alternative transportation, or if there are other advantages, such as substantial savings in time. Personal car mileage is calculated for you in Concur:  Entering Personal Car Mileage

While on domestic University business, decline Collision Damage Waiver (CDW) and personal liability insurance offered through the car rental company, provided that the reservation is made through Concur Travel or by contacting Carlson Wagonlit Travel. If proof of insurance is needed, contact the Department of Risk Management at (609) 258-3046.
**Personal Travel**

If personal travel is combined with University business travel, only the business portion of the trip is an allowable expense. Personal expenses should be paid for using personal credit cards or other methods that do not result in the University paying for the personal expense. Please supply a formal round-trip itinerary for the true cost from Princeton to destination for reference. Please reference your amended travel in the “Business Purpose” and “Comment” section.

**Rail**

Travel by rail is allowed when it is less expensive than alternative means of transportation or when there are convenience or safety issues that justify the additional cost. Business Class travel is allowable for regular Amtrak service as well as for Acela Express Trains. For international rail travel, travelers should purchase a fare that offers reserved seating. Often, reserved seating is only available in first class. Roomettes are allowable for overnight travel.

In cases where sponsored funds are being used, and where business or first class fares are not an allowable expense, departmental funds may be used to cover the difference.

**Passports and Visas**

Expenses related to visas and passports required for business travel are allowable expenses.

**Tips Guidelines**

The following would be considered reasonable and appropriate:
- Skycap: $2 per bag
- Porters/bellperson, etc.: $2 per bag upon check-in/check-out
- Maid service: up to $2 per day
- Meals: 15% – 20% (if not included in the charge).
- Car Service: Tip is included in the negotiated rate. If using a non-contracted service, 15-20% is appropriate.

**Taxi’s**

Please keep reasonable.

**Vaccinations**

Expenses for vaccinations required for business travel are allowable expenses. University travelers are strongly encouraged to obtain vaccinations through [http://www.princeton.edu/main/administration/health/](http://www.princeton.edu/main/administration/health/).