MEMO

To: OPR

From: Joyce C. Lopuh

Date: September 2014

Re: General Information

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

Douglas Massey, 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.
Valerie Fitzpatrick, Academic Assistant to Thomas Espenshade and the Urban Studies Program.
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 and Eddie Telles. 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, Matt Salganik and Charles Westoff.
Robin Piscecky, Grants Manager.
Diana Sacke, Academic Assistant to Noreen Goldman and Heather Howard.

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.

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

**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.

**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 and 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 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 12th should be submitted by June 12th. Completed vouchers after June 13th 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 May 15th to the appropriate contact person, and to Joyce to finalize by May 18th. Joyce circulates a more detailed memo in February with policy, travel and budget guidelines.

**Computing & Scanner**

*Samantha Curatola*, Assistant Systems Administrator, Room 222, (samantha@princeton.edu).

Jennifer will be your first point of contact for computing help. Jennifer’s responsibilities include hardware, software and networking technical support; requests for software/hardware installation; storage media and printer supplies (toner); OPR notebook and projector set-up and reservations.

OPR has an automatic document scanner in Room 209 next to the fax machine. It has the capability for duplex (2-sided) and can handle up to 25 pages. First time users please see Jennifer for the set-up and login process. 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.

*Wayne Appleton*, Manager, Systems Group, Systems Administrator, Room 214, (appleton@princeton.edu).

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.

**Graduate Students**

Concur is the University’s new tool for managing University-issued credit cards, registering travel requests, and requesting reimbursement for out-of-pocket expenses. Students requesting reimbursement must now submit their own requests online through Concur; neither other students nor staff can submit requests on behalf of another person.

For additional information please refer to [http://travel.princeton.edu/graduate-students](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](http://travel.princeton.edu/faculty-staff) for additional details as well as [http://travel.princeton.edu/faculty-staff](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 travel, business meals, and books to support an individual’s job duties, teaching, or research.

Approval 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.

Also please note in the comment field that supporting documents are attached with this receipt.

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)

Marta Tienda, Director of Graduate Studies, Room 184, (tienda@princeton.edu).
Office hours by appointment.

Lynne Johnson, OPR Graduate Program Administrator, Room 210, (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.

Graduate students embarking on University-sponsored travel must complete a travel request in Concur. Reimbursable expenses are also substantiated through Concur. For additional information please refer to 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](mailto:md@princeton.edu)) maintains distribution lists for email notices of job openings, which includes their link.

Please see *Kris McDonald* ([kemerson@princeton.edu](mailto: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, lower level East Pyne*  [http://www.princeton.edu/hrc/](http://www.princeton.edu/hrc/)

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. Links below may be useful:

- [http://www.princeton.edu/hrc/languages/](http://www.princeton.edu/hrc/languages/)

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://libguides.princeton.edu/stokes](http://libguides.princeton.edu/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](mailto:jdonatie@princeton.edu), 8-1377) and Elana Broch ([ebroch@princeton.edu](mailto: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](mailto: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 are also available. Sign-up sheets are outside the doors.

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.
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 — Douglas Massey and Marta Tienda

Mary Lou and Kristen organize scheduling, catering, and distribution lists under the direction Douglas Massey and Marta Tienda.

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  
Jennifer Flath – Basic Computer 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, item number, 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.

Basic computer supplies (such as toner cartridges) should be requested through Jennifer (jlf@princeton.edu).

**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 60 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 the # key and Copier tab on left side of panel to return to Copier Mode.

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.

The purchase of books, memberships, periodicals, 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.

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: [http://www.princeton.edu/printing-mailing/](http://www.princeton.edu/printing-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 by Joyce by February 2015.

**Professional Development Committees — Joyce Lopuh**

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

Elisha Cohen and Celeste Marin will serve as chairs for the students.

Rachel Goldberg 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

Gifts or gift cards

Social Events

Spouse/partner meals
GRANT ACKNOWLEDGEMENT

OPR is primarily funded by an NIH Center Grant and also by an NIH Training Grant. The terms of the grant require that OPR affiliates acknowledge the grant(s) in the body of their publications as appropriate. Below is some suggested wording and grant information. See Joyce or Robin for other grant numbers.

NIH Center Grant:
The Eunice Kennedy Shriver National Institute of Child Health and Human Development of the National Institutes of Health, grant P2CHD047879.

NIH Training Grant:
The Eunice Kennedy Shriver National Institute of Child Health and Human Development of the National Institutes of Health, grant T32HD007163.

“Support for this research was provided by the following grants from the Eunice Kennedy Shriver National Institute of Child Health and Human Development of the National Institutes of Health P2CHD047879 and T32HD007163.”
or
“Partial support for this research was provided by grant from the Eunice Kennedy Shriver National Institute of Child Health and Human Development of the National Institutes of Health grant P2CHD047879 and by .............”

NIH PUBLIC ACCESS POLICY COMPLIANCE

Everyone affiliated with OPR, including all faculty, faculty affiliates, students, postdocs, researchers and staff, is expected 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. NIH routinely checks for compliance and OPR’s grant report is generated from the NIH database.

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 this group of 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 one of our librarians: Joann Donatiello (jdonatie@princeton.edu) or Elana Broch (ebroch@princeton.edu).

The optimal time to arrange for the 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 for yourself. The process is different for each path and depends upon the publisher and the agreement you made when submitting the final manuscript. For a list of journals that will submit a paper for you, see the NIH web page. Journals that Submit All NIH Funded Final Published Articles to PMC.

(Please note that even if a journal is on this list, you must confirm the arrangement with the publisher.)

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

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 of the article.

---

**To submit an article to the NIH PMC database**, you will need the following:

- A full citation: author, article title, journal title, date of publication, volume and issue number if available.
- Manuscript number from the publisher, if available.
- The original manuscript (in a MS word file), including the title page, the article itself and all attachments such as graphs or charts.
- The grant number (see Joyce or Robin).

Once you have all of the information above, set up a MY NCBI account and follow the steps for submitting a new article.

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

If you have any questions about complying with the NIH Public Access Policy, our librarians, Joann Donatiello (jdonatie@princeton.edu) and Elana Broch (ebroch@princeton.edu), are 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://www.wws.princeton.edu/business/forms/](http://www.wws.princeton.edu/business/forms/). Be sure to include the specific room number request under "Type of Event".

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 Piskecky 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

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

Substantiation and Reporting Fields

On all Concur Travel Expense Reports you must provide substantiation for the travel expense. It’s essential that reviewers, approving managers, and auditors understand the circumstances and why the travel 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.

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. Also please note in the comment field that supporting documents are attached with the receipt.

**Report Name:** Individual (or Host) Name, Purpose/Conference Title, Location, Month and Year

(example: J. Smith, PAA, San Diego CA, Apr 2014)
**Business Purpose:** Individual’s Name, Conference Name or Award Type, Fiscal Year

(example: J. Smith, Summer Research Award, FY’2015)

**Trip ID:** Purpose, Location, Date

**Booking Reservations**  
Travel arrangements must be made through the Concur Travel online booking tool or by calling the University's travel management company, Carlson Wagonlit Travel (CWT).

**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” points, except as outlined below.

**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 is reasonable and appropriate for the purpose and length of the trip are allowable.
**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 (before taxes). 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 automobile 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 the lowest cost alternative transportation, or if there are other advantages, such as substantial savings in time. Personal mileage rate is .56 cents per mile. Please include a MapQuest page (or equivalent) for reference.

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 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/).