

Sponsored Projects Expenditures 'How-to' Guide

This guide is intended to assist Principal Investigators and staff grant management with the primary administrative tasks associated with carrying out your sponsored project. Please contact your divisional budget manager or osp@seattleu.edu if you have a transaction not addressed below.

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Preparing Faculty Stipend Requests

Academic Operations in HR has updated the Faculty Stipend Request form to simplify the process. This form can now be completed via two methods. You can use either option, but DocuSign is recommended to streamline the process and tracking of the document:

1. Use the updated Faculty Stipend Request form
 - a. obtain all signatures and submit to HR-academicoperations@seattleu.edu
2. Use the Faculty Stipend Request template in DocuSign to route for signatures. Please view [this recording](#) for instructions on using this form or contact HR-academicoperations@seattleu.edu with any questions.
 - a. To request access to DocuSign, please email servicedesk@seattleu.edu
 - b. Once you have a DocuSign account, contact [Lorena Toledo-Eastey](#) to request access to the stipend template.

Hiring Students

The student hiring process is managed by the Director of Student Employment in the Career Engagement Office. You can view a recording of the complete student hiring process [here](#), and review the Guide to On-Campus Student Employment [here](#). There are 5 steps to the hiring process:

1. Draft the job description (see the [Job Description Toolkit](#))
2. Post the job on [Handshake](#) to ensure equity in access to opportunities
3. Conduct the hiring process
4. Establish a start date and submit the Student Employment Action Form at least **10 days before the start date**
5. If the student-employee has never worked on campus before, they must complete the new hire paperwork prior to the start date

Responsible Conduct of Research

Responsible Conduct of Research training is required for all personnel conducting research under an award funded by the National Science Foundation and the National Institutes of Health. However, it is strongly encouraged that all SU researchers complete the training every four years to maintain our institutional commitment to research integrity and to prepare our students for graduate studies or professional experiences. More information and instructions on completing the training can be found [here](#) and the training can be accessed on the [CITI Program](#) website.

Apply for a ProCard

- To reduce the burden of making any purchases on a personal credit card, the university encourages the use of procards. If you have many procurement needs that cannot be met within ProcureSU, the OSP encourages you to apply for a Procard.
- Application Process
 - To apply, please complete the [Procard Application Form](#).
 - Send to your divisional financial manager for approval.
 - Email the completed application to procard@seattleu.edu.
 - Any questions during the application process can also go to procard@seattleu.edu
 - Turnaround time may take up to 3-4 weeks
 - More information about the Procard Program can be found in the [Procard Program Policy and Procedures Manual](#)

Reimbursements – Chrome River

- All reimbursements must go through Chrome River as of 4/1/2023.
- If the reimbursement is for someone other than you, that person must delegate this authority to you first
 - [Create an Expense Report within Chrome River](#)
 - On the Dashboard, click **+ Create** in the **Expenses** pane
 - Input information in the required fields on the Expense Entry Screen (Report Name, currency type, report type, business purpose, etc)
 - Click **Save**
 - [Upload your applicable receipts](#) to Chrome River and attached to your expense report
 - Images may be uploaded directly through Chrome River, emailed, or added using the [Chrome River SNAP app \(iPhone only\)](#)
- *Be sure to select your correct grant activity string on the expense report.*

Travel – Egencia

- **Egencia for booking**
 - Egencia is now required for all business travel bookings (for airfare, hotel, and rental cars).
 - Note: This does not have the ability to direct charge your grant. You will need to pay for the reservations by Procard or personal credit card. If you do not have a Procard by the time you need to travel, please discuss using a departmental Procard with your chair – we can journal entry the expense to your grant after the travel has occurred.
 - To get started with Egencia, you'll need to create an account - To create an account please send an email to procurement@seattleu.edu requesting access and with the following information:
 - Name, email, and SU ID
 - The role which is most appropriate; Traveler or Arranger. Please visit the training page for details about each role.
 - Further instructions about the traveler and arranger roles, and on how to book flights, hotels, and cars are [located here](#).
 - Your departmental admin may be a resource in assisting you with booking travel through Egencia.
- All other travel expenses (such as per diem or ground transportation) can be submitted for reimbursement, following the travel, in Chrome River (see above process).

Subawards and Contracts – ProcureSU

- All subawardees and contractors must first be set-up as a vendor in ProcureSU, if they are not already in the system. To do so, you will need a [W-9 form](#) from the subawardee/contractor.
- **To set up a vendor:**
 - From ProcureSU Home page, navigate to **Request Forms** towards the bottom of the home page
 - Select the **ProcureSU Vendor Update Request** form
 - Please fill out the form in its entirety and attach the latest [W-9 form](#) from the subawardee/contractor
 - After Procurement reviews the completed form, they will add the vendor, and you will be notified
- **Subaward – use Declining Balance PO Form**
 - From the ProcureSU Home page, navigate to the **Forms** tab (top middle of the home page) and you'll see [Declining Balance PO](#) as one of the available forms
 - Alternatively, from the ProcureSU home page, search for "[Declining Balance PO](#)" within the search box, then select that form. Follow each prompt
 - Upload the contract or agreement with the vendor
 - Enter the *total contract value* for this PO
- **Contractors – use Independent Contractor Form**
 - Set up for the full amount of contract so that it will function like a Declining Balance PO
 - From the ProcureSU home page, scroll down to the **Request Forms** section and select the [Independent Contractor Form](#) quick link.
 - Follow the prompts within the Independent Contractor Form
 - ProcureSU will automatically create an initial invoice, you will need to comment on the invoice to delete the initial "full contract value" invoice that the "system" creates. The comment should state please delete full contract value invoice – individual invoices to follow
 - After that, email each invoice and note the declining balance PO number in the email to payables@seattleu.edu
- **Paying invoices:**
 - The process is as follows:
 - Review invoices to ensure accuracy of expenses with sub/contractor scope of work and budget
 - Email invoice with the PO number and invoice number (if applicable) in the subject line to payables@seattleu.edu

Supply and Equipment purchases – 3 options

- **Purchase with a Procard**
 - You'll then use Chrome River to create expense reports for Procard transactions and attach receipts (multiple transactions can be submitted on one expense report).
 - *Be sure to select your correct grant activity string on the expense report.*
- **Reimbursement via Chrome River**
 - Follow the same reimbursement process as noted above.
- **ProcureSU**
 - [Vendor catalogs](#)
 - [Set-up a new vendor](#) and [Purchase Order](#)

Other Questions

For additional information about managing your sponsored project, please visit our [Manage an Award](#) website. And for quick reference, please bookmark our [Sponsored Projects Expenditure Guide](#). Other questions about spending on grants, or your grant budgets – please contact osp@seattleu.edu.