

## Psychology Graduate Student Support Funds Process

All Psychology graduate students can use up to \$1,000.00 per year in department funds (at the discretion of the department chair) for support of their graduate studies. Funds can be used from September 1<sup>st</sup> through August 31<sup>st</sup> each year.

### **Procedure:**

- 1) **Contact Tim Greeson to verify your available funds**
  - a) **Let him know how/when you plan on using the funds**
- 2) **Forward your available balance via email from Tim to your business office contact (see below)**
- 3) **After purchases are made, let Tim know how much you spent**
- 4) **Reconcile expenses (one or more of the following is needed-process at end of document)**
  - a) **Pcard purchase (university procurement card purchase)**
  - b) **Travel reimbursement (personal funds and/or travel card purchase)**
  - c) **Personal reimbursement (personal funds purchase)**

Your business office contact will help with questions concerning university purchasing policies and procedures. Reach out to them prior to making a purchase if unsure on the process.

- Business office contact information is listed on the Psychology website
  - a. Your contact person follows your supervisor or faculty advisor
  - b. <https://www.colorado.edu/psych-neuro/resources/business-office>

### **If you are spending your money to attend a conference, here are the steps to follow:**

- 1) Request approval from your supervisor or faculty advisor to attend
- 2) Fill out the department travel authorization (TA) request
  - a. Found on the Psychology website (link above)
  - b. Include all travel expenses in the total amount on the form
    - i. If amount is larger than your available funds, you can reach out to your faculty advisor to see if they have supplemental funds
      1. Send approval from your faculty advisor via email to your business office contact. Please note - the business office will be unable to approve TA's without this documentation if extra funds are required
- 3) If international travel, you will need to get additional approval through Concur (via MyCU Portal), attach COVID safety questions and your signed department travel authorization
  - a. Full procedure found on the Psychology website under "travel procedure"

After your travel request is approved (department TA and international (Concur) if applicable), you can begin booking your airfare, conference registration and hotel:

- 2) Airfare **must** be booked through Concur (CU system) or CBT Travel (travel agency) per university policy
  - a. For the speedtype (ST) to use, contact Tim
    - i. ST = funding source
    - ii. Do not use the default ST that pops up in Concur
- 3) Conference registration
  - a. May be charged to a Procurement Card
    - i. Reach out to your supervisor or faculty advisor for help with the purchase
  - b. Pay out of pocket

- i. Request reimbursement after travel to the conference has concluded
- 4) Hotel
  - a. Pay out of pocket and book yourself
    - i. Request reimbursement after travel to the conference has concluded
  - b. Reserve hotel through Concur
    - i. Pay out of pocket at the hotel
    - ii. Request reimbursement after travel to the conference has concluded
  - c. May be charged to a Travel Card
    - i. Travel cards are not given out for **one-time** travel purchases
      - note - Pcards **cannot** be used to purchase travel expenses
    - ii. If you will be traveling multiple times throughout the year, reach out to your business office contact to discuss options
    - iii. Complete a travel reimbursement to reconcile charges on a travel card

All travel expenses (including airfare purchased through Concur) must be reconciled after travel has been completed. Fill out the on-line FSC travel expense reimbursement form and attach itemized receipts for all expenses. The form can be found on the Psychology website along with detailed travel procedures (link below). Make sure to include all speedtypes used (funding sources) on the form.

<https://www.colorado.edu/psych-neuro/sites/default/files/attached-files/travel-policies-and-procedure-2.pdf>

***If you are spending your money to pay research participants:***

- 1) Reach out to your business office contact who will help you with the process

***If you are spending your money on research supplies:***

- 1) May be purchased using a Procurement card or in Marketplace
  - a. Reach out to your supervisor or faculty advisor for help with the purchase

**Reconcile Procedures**

***On-line forms found here: <https://www.colorado.edu/psych-neuro/resources/business-office>***

***\*\*Click on the correct form, login in with your identikey and password, FSC tech is Lisa Livdahl\*\****  
***\*Incomplete forms/paperwork will be sent back\****

***a) Procurement card (Pcard) purchase***

- i. Fill out the on-line Pcard purchase receipt form
- ii. Attach itemized receipt(s)
- iii. State on the form who the purchase is for (student's name) and that this is grad support funds

***b) Travel reimbursement***

- i. Fill out the on-line travel reimbursement request form
- ii. Attach itemized receipt(s)
- iii. Attach approved department TA

***c) Personal reimbursement (non-travel)***

- i. Fill out the on-line personal (non-travel) reimbursement request form
- ii. Attach itemized receipt(s)