

Post Award – Reimbursements

All ORE staff have responsibility for pre-award and post-award activities. Sometimes work may be with a single individual in the ORE, sometimes work will be managed by multiple people. This is dependent upon the ongoing workload within the ORE and the respective tasks of each member of the ORE team.

Reimbursements

The ORE is responsible for reimbursements associated with expenditures on externally funded projects. There are two types of reimbursements that the ORE handles. The first are internal reimbursements, which are reimbursements to UMass employees or students for funds that are expended by an individual for grant related costs. For example, a reimbursement for a PI who spent money for a trip that was allocated on a funded project for a conference presentation. The second type of reimbursements are external reimbursements, which are reimbursed to outside entities for work completed as part of a funded project by a PI in the College of Education. For example, a private consultant who completes a grant related activity specific in a grant budget and the budget narrative. The ORE will work to ensure that the consultant is reimbursed for the associated activities. The ORE will:

For Internal Reimbursements:

- The ORE will work with an individual (e.g., student, staff member, faculty member) to get reimbursed for expenditures on a grant-related activity:
 - The ORE will inform the individual of the required receipts and / or other documentation needed for reimbursement.
 - The ORE will work with the individual to complete the necessary paperwork for reimbursement.
 - The ORE will process the reimbursement via Expense Reports in PeopleSoft
- Work with the PI and associated University entity (e.g., UMass Store, UMass catering) to complete reimbursements for grant-related activities. ***ORE will not be responsible for event planning or ordering related to projects:***
 - The ORE will work with the PI to coordinate reimbursement with the appropriate internal entity.
 - The ORE will process reimbursements using a General Recharge Form.

For External Reimbursements

- The ORE will work with non-UMass entities (e.g., consultants, speakers, evaluators, businesses, companies, non-profit organizations) to get reimbursed for project-related activities.
 - The ORE will ensure that entities are set up as vendors (See Policy on Invoicing and Payments) and that all vendor information is accurate and updates via UPST form.
The ORE will process invoices via Buyways.

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January 20, 2020

