Navigating the Gray Area — Tricky Approval Scenarios

SCENARIO #1 – COMPUTER SOFTWARE
An expense reimbursement has come into your queue for approval. A temporary/casual employee has an hourly appointment on the PI’s sponsored project. They are assisting with a literature review that is required for the project. The employee is working at their home on the East Coast and in order to do the work for the literature review, a specific software is required on the PC. This software was purchased out of pocket by the employee and they are requesting reimbursement to be charged to the sponsored project.

Is this reimbursement allowable? How much can be allocated to the sponsored project?

SCENARIO #2 – DIRECT VS INDIRECT COSTS
A PCard transaction has come into your queue for approval. The conference (supported by a DOE project) was held in Washington D.C. and participant packets of educational materials were provided. Logistically it made more sense to have the packets printed in Washington D.C. prior to the conference at a local vendor than to ship/transport the materials. Based on the activity of this award, these types of supplies were considered in excess of normal overhead since a large part of the project’s goal included creating the educational handouts to be compiled into a folder for Participants. These costs were included in the budget but General Operating Services was not set up in the project budget.

Are these charges allowable on the project? What account category should they be charged to?
SCENARIO #3 – CHANGE FEES
An expense reimbursement has come into your queue for approval. The employee (paid 100% on sponsored funds) traveled for a conference but needed to return early due to an FMLA-related family matter. As a result, a $150 change fee was incurred and is included in the employee reimbursement.

Can the $150 change fee be reimbursed? Can it be charged to the sponsored project?

SCENARIO #4 – AIRLINE CREDIT
An expense reimbursement has come into your queue for approval. A faculty member attended a conference in Denver from 12/1/15 - 12/5/15 to present research results from their NSF sponsored project. The roundtrip airfare charge was $255, but an airline credit of $50 was applied to the cost of the airfare, resulting in the total out-of-pocket cost to the faculty of $205. In the justification, the faculty member explains that the credit is the result of the cancellation by the airline of a flight for a personal trip and that the credit was due to expire if it wasn’t used by 12/31/2015. The faculty member is requesting the full $255 airfare to be reimbursed from the NSF sponsored project.

How much of the airfare should be reimbursed?
SCENARIO #5 – INTERNET FEES
An expense reimbursement has come into your queue for approval. The PI traveled to Europe to attend a conference to present research results for their NIH sponsored project. Included in the reimbursement are charges for Internet Access during the international flight. The justification stated by the PI is that the internet access was necessary to conduct University business while traveling.

Would you allow the internet access to be charged 100% to the sponsored project?

Thank you to our Subject Matter Experts:
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