

# Student Resource Guide

## **Administrative Staff**

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## **Delegate Someone in Concur**

It's quick

- 1) Log in to Concur, which is accessible through Wolverine Access.
- 2) Go to your profile (top right of the home screen) and click the "Profile Settings" link.
- 3) To add an expense delegate, go to your expense settings (menu to the left), select "Expense Delegates," click the "add" button at the top, and enter the username of the person you want to delegate. Make sure to check the first 3 boxes next to the person's name in that line to give him/her the necessary access to prepare expense reports (reimbursements) for you. Do not give this person approver status or add your advisor as an approver. Click the "save" button.
- 4) To add a travel arranger delegate (to book travel arrangements through Concur), go to your travel settings (menu to the left), select "Assistants/Arrangers," click "add an

assistant,” enter the username of the person you want to add and check the “can book for me box.” Click the “save” button.

- 5) To add an expense approver (this should be Michelle), go to your expense settings (menu to the left), select “Expense Approvers,” and enter the username (chapman). Click the “save” button.

## Reimbursement for Purchases (unrelated to travel)

### Checklist:

- ☐ The person preparing the expense report (reimbursement) is set as a delegate in Concur [cf. “Delegate Someone in Concur”].
- ☐ Shortcode(s) to be charged--*must include advisor approval* (forwarding an e-mail containing this approval is acceptable).
- ☐ Submit a *legible* receipt (preferably via e-mail).
- ☐ If you paid with a credit card, submit a document from the relevant credit card account showing the charge has posted--make sure the document you submit shows the last 4 digits of the account (card) number, the date of purchase, and the vendor to match the receipt. If you would like any other information redacted from the file, please indicate that upon submission.
- ☐ **Remember to submit the expense report in Concur once you receive confirmation from staff that it is ready.**

### Other Reminders:

- ★ Reimbursements are not guaranteed. Purchases should be made through the ECE Purchasing System to ensure the expense is approved in advance. Don’t risk losing your money!
- ★ Reimbursements are subject tax withholding after 45 days, meaning the amount you receive from the University after this point could be less than you originally paid. Submit your documentation early!

## Shipping

**\*\*\*\*The University has a contract with UPS to serve its shipping needs and receives a DEEP discount through the campus system. As such, shipping should always go through UPS, via UM staff, unless an outside company is covering the cost of shipping.**

### Checklist for preparing a PDF label to print:

- ☐ Shortcode to be charged for the cost of shipping--*must include advisor approval* (forwarding an e-mail containing this approval is acceptable).

- ☐ The speed at which the package needs to be sent, keeping in mind that the faster it goes, the more it costs. This *must include advisor approval* (forwarding an e-mail containing this approval is acceptable). The options are ground, 2 day and next day.
- ☐ The address to where the package is going, plus any contacts [e.g. John Doe] or special identifiers which should be noted, like “ATTN Evaluation Department” or PO XYZ123.
- ☐ The type of package used. Is it a UPS flat rate box or envelope? If so, which one? If not, what are the 3 dimensions of the box or size of the envelope (or whatever you are using) and what is the weight of the package?
- ☐ What is in the package--what is being shipped and why? [Brief description--a sentence is fine.]
- ☐ Does the package contain batteries?
- ☐ Send the above information to one of the administrative staff listed above.
- ☐ Print the PDF attachment the administrative staff person sends you and attach it to the package.
- ☐ Take the package to the EECS dock during business hours.

#### Other Reminders:

- ★ Although creating the label is typically quick, if all information is submitted, the Campus Ship system (used to generate the label) can be glitchy. Please plan ahead, and do not wait until the last minute.
- ★ Please note that staff will help you locate appropriate packing materials where possible, **BUT staff will not pack items for shipping.**

## Travel

### \*\*\*IMPORTANT REMINDERS\*\*\*

- Reimbursements are not guaranteed. Refer to the Detailed Summary of Reimbursable and Non-Reimbursable Expenses. [Link to Reimbursable Expense Document](#)
- Have administrative staff pay for registration and book your airfare. **Flights aboard non-American based airlines, even if they are significantly cheaper, are ineligible for reimbursement unless they meet very specific criteria** (see “Other Requirements” below).
- Hotel rooms can only be booked for single occupancy except when students share a room together. Exceptions must be documented (see “Other Requirements” below); occupant names must be submitted with the reimbursement request; or full reimbursement cannot be guaranteed.
- Check with staff before renting a car. The rental must meet specific criteria (see “Other Requirements” below). Staff can also book for a significant discount (UM has partnerships with Enterprise and National Car Rental).
- Save receipts for all *business* expenses. **Note that hotel and food receipts must be itemized**--if the establishment does not give you an itemized receipt, ask for one!

- Those traveling in groups should all pay for their own expenses (e.g. hotel, meals, etc.)
- Alcohol is not reimbursable.
- One day before and after the meeting or conference dates are considered travel days. All additional days are considered personal days and expenses incurred on these days are not eligible for reimbursement. Where flights are concerned, a flight comparison will determine the difference in cost between what is needed for conference dates and what is requested for personal days. You will be responsible for paying the difference if the cost of flights to accommodate personal days is greater than that required for the conference dates. Please reach out to staff to book airfare and if you are considering adding personal days to travel.
- Register your travel before you leave. Registering travel allows access to University health insurance. It also facilitates communication in the event of an emergency situation and enables the University to assist with re-entry into the United States.
- If you receive a travel grant to defray expenses that have already been paid by the University (either in advance through staff assistance or through reimbursement), you will be required to pay the grant money back to the University. Please work with staff to prepare and deliver the check. Note that you will be required to pay back the full amount of the grant, even if taxes are deducted.
- There are no reimbursements for local travel.

Checklist:

- ☐ The person who will prepare the expense report (reimbursement) is set as a delegate in Concur [cf. "Delegate Someone in Concur"].
- ☐ Shortcode(s) to be charged--*must include advisor approval* (forwarding an e-mail containing this approval is acceptable).
- ☐ The Student Travel Form, filled in with your signature and date. [Link to Student Travel Form](#)
- ☐ Conference Agenda or Program with the dates, location and your panel (if applicable). A link to a webpage is acceptable.
- ☐ Conference Registration Receipt. **\*\*This is rare--**students should have administrative staff complete their registration in advance.
- ☐ Flight Receipt & Itinerary. Must show proof of payment (confirmation of booking/flight itinerary is not enough). **\*\*This is rare--**students should have administrative staff book their flights in advance.
- ☐ Receipt(s) for Accommodation: *must be itemized and must show proof of payment* (confirmation of booking/itinerary is not enough). Include the names of all occupants for the stay. Include supplemental documentation if the occupancy is listed as greater than the number of students traveling for UM business (see "Other Requirements" below).
- ☐ Receipts for Ground Transportation--taxi, car share service, metro, bus, etc.
- ☐ Receipts for food--submit itemized receipts (request one if it is not provided). Reimbursement will be calculated according to expense incurred, per diem, up to a fixed dollar amount (\$41.25 for days en route to location; \$55 for days on site).

- ☐ If you paid with a credit card, submit a document from the relevant credit card account showing the charge has posted--make sure the document you submit shows the last 4 digits of the account (card) number, the date of purchase, and the vendor to match the receipt. If you would like any other information redacted from the file, please indicate that upon submission.
- ☐ Fly American Exception Form, IF: your flight was with a non-American based airline (\*\*must be accompanied by a flight comparison). THIS IS VERY RARE--see "Important Reminders" above. **This form should be completed and approved in advance of travel whenever possible.** It is only required for travel charged to sponsored projects (not Research Incentive). [Link to Fly American Exception Form](#)
- ☐ Flight Comparison, IF 1) flying to or from destination greater than one day on either side of the date range for the event (e.g. the conference takes place on the 14<sup>th</sup> and 15<sup>th</sup> and your flight takes place on a date different from the 13<sup>th</sup> and 16<sup>th</sup>) OR 2) your flight was with a non-American based airline; OR 3) you rent a car. This documentation is to show the cost difference, if any, between flights or mode of transportation.
- ☐ Receipt for rental car—must be itemized and show proof of payment; must be accompanied by written approval from advisor (e-mail is fine). **\*\*This is rare.**
- ☐ Fuel receipts: The University will reimburse for fuel OR mileage, not both. **\*\*This is rare.**
- ☐ Receipt for parking. **\*\*This is rare.**
- ☐ Submit all relevant documentation to administrative staff (preferably via e-mail).
- ☐ **Remember to submit the expense report in Concur once you receive confirmation from staff that it is ready.**

#### Other Information:

- ❖ **Fly America Act:**  
<https://www.gsa.gov/policy-regulations/policy/travel-management-policy/fly-america-act>
- ❖ **Car Rental:** must be approved in writing by the student's advisor. Must be cheaper than alternative modes of transportation. Must NOT include loss/damage waiver or collision insurance--the University self-insures and THIS COST IS NOT REIMBURSABLE.
- ❖ **Accommodation:** In rare cases where it is not possible to book a single occupancy room, students should corroborate this condition. Screenshots of the booking system should include the appropriate number of occupants selected for booking and the options given. Other documentation from the hotel regarding their standard booking procedure/room set up is also acceptable (i.e. the rate is the same regardless of occupancy). The University will not reimburse the full amount if there is the possibility that there are additional occupants traveling on non-University business (e.g. friends, spouses or children accompanying).
- ❖ Reimbursements are not guaranteed. Have administrative staff pay for registration and flights in advance. Don't risk losing your money!
- ❖ Reimbursements are subject tax withholding after 45 days, meaning the amount you receive from the University after this point could be less than you originally paid. Submit your documentation early!

## Defenses

\*\*\*\*\***BEFORE** finalizing your defense date, check with the Ph.D. Program Coordinator (Kristen Thornton) and Department HR Representative to ensure there will be no unintended consequences for your appointment with the University, including, but not limited to, cancellation of employment, delays or denials of payment, denial of access to benefits, and visa status changes.

## Hosting

- Hosting refers, commonly, to local expenses for food to conduct University business, including taking an official guest out to lunch or ordering food for a meeting.
- **Hosting is *heavily regulated by state authorities*. Contact staff to assist with hosting well in advance, or you will likely not be reimbursed for your expenses.**

## Conference Room Scheduling

\*\*\*\*\*Please note that only staff can reserve conference rooms and that requests are handled centrally. Please contact staff to request a reservation, so they can coordinate with the appropriate person. Please allow ample time for your request.