UMPDA Awards/Reimbursements

Last Revised Aug 25, 2023

Reimbursement Instructions for Postdoctoral Fellows

Important Notes:

- Reimbursements must be submitted to the Shared Services Center (SSC) <mark>within 45 days</mark> of purchase, per U-M stewardship policies
    - Please make sure to submit the email to the UMPDA Treasurer within 30 days of purchase in order to comply with the above deadline
- Awards are funded from two sources: Rackham Graduate School (Rackham) and the Office of Graduate & Postdoctoral Studies in the Medical School (OGPS)
    - <mark>ALL Professional Development Awards are reimbursed through Rackham</mark>
    - <mark>Conference Awards are reimbursed through either Rackham or OGPS</mark>
- The fiscal year runs from July 1-June 30 each year

Important Contacts

As of February 2024
- UMPDA Current Co-Presidents
    - umpdacochairs@umich.edu
    - Marlis Denk-Lobnig (mdenklob@umich.edu)
    - Saranyaraajan Varadarajan (varadars@med.umich.edu)
- UMPDA Treasurer
    - Murat Yaman (ymurat@umich.edu)
    - umpda.treasurer@umich.edu
- Rackham Contact
    - Trish Fugate (tifugate@umich.edu)
- OGPS Contact
    - Kaylee Steen (steenk@umich.edu)
    - Kevin Calhoun (kacalh@umich.edu)

Important Links

- UMPDA Award/Reimbursement Instructions (ALL)
- Professional Development Award Reimbursement Instructions
- Conference Award Reimbursement Instructions
- Mileage Reimbursement for Outreach Program at Macomb Correctional Facility Instructions

Instructions - **Rackham** Awards/Expenses

1. Complete the [UMPDA Expense Tracking & Reimbursement Google form](#)
2. Postdoc recipient of the award will send an email to UMPDA Treasurer (umpda.treasurer@umich.edu) with the required information (postdocs should utilize the email templates included below)
   - More information about what to include in the email & as attachments: https://ssc.umich.edu/travel-expense/reimbursements-pcard-expenses/
3. UMPDA Treasurer will review the email and confirm that all information is correct and matches the UMPDA permitted award amount
   - If information is incorrect or if there is missing information, UMPDA Treasurer will work directly with the postdoc to correct
4. UMPDA Treasurer will add the appropriate shortcode and forward the email to SSC at expensereports@umich.edu
5. SSC will prepare an expense report for you to submit through Concur. This report will then be sent to Trish Fugate (tifugate), of Rackham, for approval (also via Concur).
6. Trish Fugate will review and either approve and send to James Giegler for final approval or send back to postdoc to make necessary changes
   - If sent back to postdoc, postdoc will make necessary changes in Concur and resend for approval
7. James Giegler will review and either approve and send request on for final audit and payment or send back to postdoc to make necessary changes
   - If sent back to postdoc, postdoc will make necessary changes in Concur and resend for approval

Instructions - **OGPS** Awards/Expenses

1. Complete the [UMPDA Expense Tracking & Reimbursement Google form](#)
2. Postdoc recipient of the award will send an email to UMPDA Treasurer (UMPDA.treasurer@umich.edu) with the required information (please utilize the email templates included below)
   - More information about what to include in the email & as attachments: https://ssc.umich.edu/travel-expense/reimbursements-pcard-expenses/
3. UMPDA Treasurer will review the email and confirm that all information is correct and matches the UMPDA permitted award amount
   - If information is incorrect or if there is missing information, UMPDA Treasurer will work directly with the postdoc to correct
4. UMPDA Treasurer add the appropriate shortcode and forward the email to SSC at expensereports@umich.edu

5. SSC will prepare an expense report for you to submit through Concur. This report will then be sent to Kaylee Steen, of OGPS, for approval (also via Concur).
6. Kaylee Steen will review and either approve and send request on for final audit and payment or send back to postdoc to make necessary changes
   ○ If sent back to postdoc, postdoc will make necessary changes in Concur and resend for approval

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Mileage Reimbursement for UMPDA Outreach Programs at Macomb Correctional Facility

1. Complete the [UMPDA Expense Tracking & Reimbursement Google form](#)
2. Postdoc recipient of the award will send an email to UMPDA Treasurer (umpda.treasurer@umich.edu) with the required information (postdocs should utilize the email templates included below)
   ○ A screenshot of the e-mail from Macomb listing your visit date(s) should be included as an attachment
     ■ Trips should be submitted once a month and include all mileage for that month
   ○ Current mileage reimbursement for 2023 is 62.5 cents per mile ([SPG 507.10-1](#))
     ■ Per U-M policy, origin for business travel is computed from the employee's U-M office location
   ○ [U-M reimbursement policy](#)
3. UMPDA Treasurer will review the email and confirm that all information is correct and matches the UMPDA permitted award amount
   ○ If information is incorrect or if there is missing information, UMPDA Treasurer will work directly with the postdoc to correct
4. UMPDA Treasurer will add the appropriate shortcode and forward the email to SSC at expensereports@umich.edu
5. SSC will prepare an expense report for you to submit through Concur. This report will then be sent to Trish Fugate (tifugate), of Rackham, for approval (also via Concur).
6. Trish Fugate will review and either approve and send to James Giegler for final approval or send back to postdoc to make necessary changes
   ○ If sent back to postdoc, postdoc will make necessary changes in Concur and resend for approval
7. James Giegler will review and either approve and send request on for final audit and payment or send back to postdoc to make necessary changes
   ○ If sent back to postdoc, postdoc will make necessary changes in Concur and resend for approval

Per Diem

Postdocs are now welcome to use their award money to help cover meals while traveling by requesting per diem, as long as the total amount being reimbursed does **not** exceed the total award amount.

The university uses the per diem allowance set by the US government to cover meals and incidentals (not lodging) while on business travel status. Please use this website to calculate the per diem amount allowed, which is specific to major cities. More information on the university's per diem policy can be found here.

To request per diem to be added to your reimbursement, please make sure to include this information in your email to the UMPDA Treasurer (as shown in the email templates below).

*Please note: meal receipts should NOT be attached if requesting per diem.

Email Template - **Rackham** Awards/Expenses

Postdoc to update the fields in brackets below

To: UMPDA Treasurer
Subject Line: Reimbursement for *[Awardee Name]*, from Rackham - UMPDA *[Award/Expense]*
Body:
>Participant: *[Postdoc first and last name]*
>Email: *[Postdoc umich email]*
>Business Purpose: *[Event/Conference/Membership Fees/Travel Expense/etc.]*
>Date: *[Date of event/Travel Dates/Date of Purchase]*
>Event Information: *[Include as much information about the event as possible including location, virtual/in-person, type of event, link to website, etc.]*
>Reason: *[Include 1-2 sentences explaining the purpose behind the purchase]*
>Total Cost: *[Total amount for event/purchase]*
>Amount for Reimbursement: *[Make sure this matches the amount awarded by UMPDA]*
>Approvers: **Trish Fugate (tifugate) and James Giegler (jgiegler)**
>Per Diem: *[Yes/No, I will/will not be requesting per diem. Be sure to include if any meals were provided by the conference]*
>Attached: *[All corresponding receipts and conference award letter from UMPDA]*

NOTE: If hosting expense, make sure to include the list of all attendees, including full names and uniqnames (this can be added as a spreadsheet)**

Email Template - **OGPS** Awards/Expenses

To: UMPDA Treasurer
Subject Line: Reimbursement for *[Awardee Name]*, from OGPS - UMPDA *[Award/Expense]*
Body:

Participant: *[Postdoc first and last name]*
Email: *[Postdoc umich email]*
Business Purpose: *[Event/Conference/Membership Fees/Travel Expense/etc.]*
Date: *[Date of event/Travel Dates/Date of Purchase]*
Event Information: *[Include as much information about the event as possible including location, virtual/in-person, type of event, link to website, etc.]*
Reason: *[Include 1-2 sentences explaining the purpose behind the purchase]*
Total Cost: *[Total amount for event/purchase]*
Amount for Reimbursement: *[Make sure this matches the amount awarded by UMPDA]*
Approvers: **Kaylee Steen (steenk) and Kevin Calhoun (kacalh)**
Per Diem: *[Yes/No, I will/will not be requesting per diem. Be sure to include if any meals were provided by the conference]*
Attached: *[All corresponding receipts and conference award letter from UMPDA]*

NOTE: If hosting expense, make sure to include the list of all attendees, including full names and uniqnames (this can be added as a spreadsheet)**

Email Template - Mileage Reimbursement for Travel to **Macomb Correctional Facility**

To: UMPDA Treasurer
Subject Line: Reimbursement for *[Awardee Name]*, from Rackham - UMPDA *[Award/Expense]*
Body:

Participant: *[Postdoc first and last name]*
Email: *[Postdoc umich email]*
Business Purpose: Mileage reimbursement for Macomb Correctional Facility
Mileage: *[total roundtrip miles from U-M office location to Macomb Correctional Facility - NOT from your home address. Please include a link to Google maps confirming the distance between U-M office and Macomb Correctional Facility]*
Date: *[Date of travel]*

Event Information: *[Include the title of the course/program being delivered to Macomb Correctional Facility]*

Total Amount for Reimbursement: *[Enter roundtrip miles x 62.5 cents for total mileage reimbursement]*

Approvers: **Trish Fugate (tifugate) and James Giegler (jgiegler)**

Attachment: Attach a screenshot of the e-mail from Macomb Correctional Facility listing the date(s) of the visit(s).