

Princeton University Graduate Student Organizations Handbook

2022-2023



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REGISTERING YOUR GROUP

- To form a new graduate student group, the group needs to register with the Graduate School by completing the online [Student Organization Recognition application](#) including a statement of purpose. The application explains basic University guidelines for student organizations. Officers of the organization will personally assume financial responsibility for the organization. (Student organizations which are legally incorporated may provide evidence of their incorporation and a list of governing board members as an alternative to the individual officers assuming financial responsibility.) Failure to comply with these guidelines may result in loss of recognition for the organization.
- The group must have a minimum of 2 officers: President and Treasurer. Both the President and Treasurer must be graduate students. Undergraduate students may participate in activities of graduate student organizations and hold leadership positions other than President and Treasurer.
- Recognized student organizations are granted the following privileges:
 1. The opportunity to use certain University facilities for programs and meetings.
 2. The opportunity to open a chart string account with the University through which purchases can be facilitated and reimbursed.
 3. The opportunity to request funds through [SAFE \(Student Activities Funding Engine\)](#) from the Graduate Student Government Events Board and other University sources for group activities.
 4. The opportunity to include the organization on the Graduate School website.
 5. The opportunity to maintain a group University [e-mail account](#), organization website and/or e-mail distribution list.
 6. The opportunity to advertise events and activities through myprincetonu and the Graduate Student Government weekly announcement emails.
- It is beneficial to both the University and the group for student organizations to be recognized by the University and to have their activities approved. The University may be called upon to ensure that the organizations meet their financial and other obligations. In addition, the Internal Revenue Service requires that certain records be maintained to preserve the University's tax-exempt status. It is important to make sure that the purposes and activities of the organization are consistent with the established purposes of the University.
- Recognition by the University does not imply official endorsement of the organization's ideas or activities. Student organizations may sponsor speakers of their choice and are free to hold meetings and in other ways express their views, subject only to the protection of people and property and adherence to reasonable regulations respecting time and place (see [Rights, Rules, Responsibilities](#) for more information).
- Once your group has been officially recognized, you will receive confirmation from the Graduate School along with the necessary information to get your group started.
 1. You will receive a confirmation email from the Graduate School that will include a [link](#) to request an organizational Net ID (email) and listserv.
 2. It is important that you set up an email address for your group to allow you to use your student group email address rather than your personal email address for advertising and to apply for funding through [SAFE \(Student Activities Funding Engine\)](#).
 3. Once you have an email account, you can also set up a website for your group.

4. If you choose to make a [website](#), let our office know and we will include your group website and the contact information for the president of your group on the Graduate School website.
 5. A University Chart String Account for your group will be generated to enable your group to deposit funds as well as pay for services if you have funds in your account.
- Your group needs to register with The Graduate School annually around August and/or anytime you have a change in officers.
 - In August/September, all registered groups will be invited to participate in the Graduate Student Organization Fair during the Graduate School Orientation for incoming students.

STUDENT ORGANIZATION CHART STRING ACCOUNT

- Generally, funds received by an organization, whether gifts or revenues generated from activities, are deposited in the organization's chart string account; expenses are paid out of this University account. Student organizations must maintain their own financial records. The treasurer should always have an accurate record of the funds in the group's account.
- The President and the Treasurer have access to the group's Chart String Account and financial reports.
- The following reports will aid the Treasurer in their record keeping. The current Treasurer's name and correct e-mail address should be on file with Graduate Student Life to ensure that access to the account information is provided.
- To access the financial reports go to prime.princeton.edu and sign in
 - Click on "Reporting"
 - Click on "Financial Management"

To get your account balance, select "Spensible Balance"

 - ◇ In "Fiscal Year" menu, select FY 2023.
 - ◇ In "Accounting Period" menu, choose current month.
 - ◇ Click "Next"
 - ◇ Under "Department," in "Keywords" box, put in your department number and click "Search"
 - ◇ In "Results" box, highlight department number and click "Insert"
 - ◇ Click "Run"
 - ◇ Your report will appear, showing the beginning balance, revenue, expenses, and the available spendable balance in the far right column, for the whole fiscal year (fiscal year is from July 2022-June 2023)

To review all your transactions, select "Ledger Detail"

 - ◇ In "Fiscal Year" menu, select FY 2023 through FY 2023.
 - ◇ In "Accounting Period" menu, choose 01 July through current month.
 - ◇ Click "Next"
 - ◇ Under "Department," in "Keywords" box, put in your department number and click "Search"
 - ◇ Click "Run"
 - ◇ Your report will appear, showing all the transactions that have gone through for your department number, organized by type of expense (i.e. travel, supplies, etc.), for the

- ◇ whole fiscal year.
- ◇ Click on the blue-highlighted hyperlinks to get more information on each transaction.
- For technical assistance or help with understanding your group’s account statement, please contact the Financial Service Center during business hours at 609-258-3080 or finance@princeton.edu, or visit the 7th floor of New South.

PLANNING AN EVENT: REGISTERING YOUR EVENT

Any graduate student wanting to use University facilities or grounds for an event or any recognized student organization wanting to hold an event/trip off campus must submit an online [Events Registration Form](#) at least three weeks prior to the proposed event. Dean Barkley-Jones’s signature is required before any event will be considered approved and registered. You will receive confirmation via email and a determination of whether your event will require Public safety coverage. Your group will be responsible for covering the cost for the Public Safety coverage if it is required for your event. The following factors will be considered when determining if public safety coverage is necessary:

1. Time of day
 2. Scale of event (number of guests)
 3. Type of event (lecture, party, performance)
 4. Involvement of non-Princeton students
 5. Controversial/high profile guest
- You will also need to register your event and have your event approved by the Graduate School. Events registrations should be submitted at least two weeks in advance of your proposed event date.
 - If you are hosting an event and you are not a recognized student organization, then you should use this [link](#) to register your event.
 - If you are a recognized student organizations, you should register your event from your group page in MyPrincetonU.
 - For set-up/clean up services and equipment rentals, please contact Building Services. For media equipment rental, please contact Instructional Support Services.
 - If your event/trip requires completion of an “Assumption of Risk and Release Form”, as determined by Dean Barkley-Jones, you must have each event participant complete the release form prior to the event. Please then submit the completed release forms, in person or via email, to the Assistant/Associate Dean for Student Affairs who approved your event.

PLANNING AN EVENT: BUDGETING AND FUNDING YOUR EVENT

- **Planning an event on campus begins with the group identifying goals, and then brainstorming about what activities might meet those goals. When initiating a program, keep the following questions in mind from the beginning:**
 - Who will sponsor the program? Will it be your group alone? Will you co-sponsor the program with an academic department or another group?
 - How will the program be financed? Does your organization's budget contain enough funds, or will you need to solicit funding from other organizations or departments? Will the revenue from the program cover any costs?

- Where will the program be held? How many people do you expect? What size room do you need? Does the program fit the facility you'd like to use?
 - Who is the intended audience for the program? Strictly students? The entire University community? Members of your organization or academic department?
 - What University services will be needed to produce the program? Will you need food catered, maintenance, security, a sound system, printing, transportation?
 - What type of publicity will be needed for this program? Who would be the audience most interested in your program? What segments of the campus or community would be attracted to your program?
- **Budgeting and Funding**
- When planning any event, two primary questions must be asked: How much will the program cost? How will the program be funded? The answer to these questions begins with a budget.
- Budgeting**
- Whether formulating a budget for a single program or a year's activities, remember that a budget is a written guideline for your plan of action. To be effective, a budget should reflect the knowledge gained in past events in the area of projecting expenditures, attendance at events, or unexpected costs. In essence, writing a budget requires planning, coordination and establishing a system of management controls for the administration of your organization.
- Funding**
- How will you fund the event?
 - [SAFE \(Student Activities Funding Engine\)](#) - SAFE is a central resource for both graduate and undergraduates to apply for funding opportunities including funding opportunities for student groups.
 - [Graduate Student Government \(GSG\) Events Board](#) - provides funding for graduate student organizations. GSG, the Graduate School and the Vice President for Campus Life contribute to the GSG Events Boards making it easier for student groups to request funding. For more information about GSG Events Board funding please visit the [GSG Events Board website](#). The Board meets every 2 weeks. After you apply through [SAFE](#) you will be invited to with GSG Events Board to explain your event and funding request to the board.
 - [Graduate College House Committee \(GCHC\)](#) - to encourages graduate student organizations to hold their events at the Graduate College (GC), student groups can apply for up to \$500 for a single event through [SAFE](#). The event must take place at the GC. The GC offers two common rooms, the projector room, the TV room, the Coffee House and the Debasement Bar. The Dbar also has a projector. In addition to funding, the GCHC can help with promoting your event by sending emails to all GC and Annex residents.
 - You may contact academic departments, centers, and other offices on campus and ask them to co-sponsor your event. Some examples are: The Davis International Center, The Gender + Sexuality Resource Center, The Pace Center, the Office of Religious life, etc.
 - Monetary Gifts/Donations - if your group will receive a monetary gift from an outside organization or individual, please contact Dean Barkley-Jones for instructions on how to properly receive the gift donation.
 - You may also consider charging a fee for your event to offset the cost. Keep in mind that the fee needs to be reasonable to not detract from attendance at your event and that you cannot make money from the event. **Please consult with Dean Barkley-Jones in advance if you plan to charge a fee for an event as there are some restrictions.**

IMPORTANT NOTE: Misuse of University funds is subject to both group and individual discipline.

PLANNING AN EVENT: RESERVING A LOCATION, BUILDING SERVICES, AND EQUIPMENT RENTALS

○ Facilities

- Due to the many activities on campus, getting the exact room, auditorium, or facility you desire may sometimes become difficult. One way to solve this problem is to plan early and reserve the space as soon as the program idea is set. In some cases, you may have to find out on what date(s) a facility is available before you can confirm your program plans. Graduate students commonly reserve space from University Services and in the following locations:
 - [University Services](#)
 - [Campus Club](#)
 - [Lakeside Apartments](#)
 - Lawrence Apartments and Graduate College – portlodg@princeton.edu
1. Navigate to the EMS Web App via <http://scheduling.princeton.edu>.
 2. Sign in via CAS in the upper right-hand corner by clicking “Welcome, Guest”. Once you are signed under your NetId (not your group NetID) your name will appear there instead.
 3. Click “Create a Reservation” on the left-hand side of the screen.
 4. Click “Book Now” in upper right-hand corner under the “Campus Space Request” option.
 5. Enter the date, start time and end time on the left-hand side of the screen.
 6. Under “Locations” click “Add/Remove”.
 7. A box will appear that has a “Find location” field. Enter your desired location.
 8. Click on the green plus sign next to your desired location. A box will pop up asking for number of attendees. Leave the box as is and select “Add Room”.
 9. Click the “Next Step” button located on the top right-hand side of your screen. This will bring you to the “Reservation Details” section of the form.
 10. Enter all the information regarding your event on this form and click on “Create Reservation”
 11. You will receive a confirmation screen saying “Reservation Created”.

Residential Space Names in EMS:

- Lakeside Apartments
 - Lakeside Commons B in EMS is “TV lounge – Commons B”
 - Lakeside Outside Grill Area in EMS is “Lakeside BBQ Deck”
- Lawrence Apartments
 - Lawrence 14 Common Room in EMS is “Lawrence Drive 14”
 - Lawrence 1 Common Room in EMS is “Lawrence Drive 1”
- Graduate College
 - GC Coffee house in EMS is “Coffee House”
 - NGC Commons Room in EMS is “Common Room”

Miscellaneous Tips

- **Preferred browser:** Please be sure to use a browser other than Internet Explorer for optimal functionality.
- **Reoccurring reservation:** To make a reservation reoccurring, click on the “Recurrence” button when filling out the “Date & Time” section of your reservation (see first image below). A box will pop up giving you cadence options for your meeting (see second image below).
- **Double check the status of a reservation:** Click the “My Events” button on the left-hand side of the EMS Web App page when you are logged in under your profile. Your reservations will appear there with a status of “Confirmed”.
- **Cancelling a reservation:** Click on the name of your event under the “My Events” screen and click “Cancel Reservation” on the righthand side.
 - You will also need to register your event and have your event approved by the Graduate School. Events registrations should be submitted at least two weeks in advance of your proposed event date.
 - If you are hosting an event and you are not a recognized student organization, then you should use this [link](#) to register your event.
 - If you are a recognized student organizations, you should register your event from your group page in MyPrincetonU.
 - For set-up/clean-up services and equipment rentals please contact Building Services and media equipment rentals please contact Instructional Support Services.
- Keep in mind the following criteria when selecting space for your program:
 - Fit the facility to the event/program - try to objectively and honestly project the number of people you expect to attend.
 - What special requirements do you have? Will you need a stage, lighting, or sound system? Do you need to have food catered? If so, is there a kitchen or serving area in the facility?
 - How long will the event/program last? Check with the appropriate scheduling office to make sure that you know the time limits, if any, of the building in which the program is to be held. Many times contractual obligations or the time needed for an event may exceed the time that the building is available. In this case, move up the starting time of the event or try to negotiate a later closing time. If you arrange for a later closing time, check to see if you will be charged for that extra time.
 - What limitations are there on the facility? Find out prior to using the facility if there are any special restrictions or regulations (i.e. outside catering restrictions and/or permit requirements).
 - Will alcohol be served? University regulations require organizations to follow the [Alcohol Beverage Policy](#) and the alcohol guidelines in this handbook. This policy includes making provisions for preventing underage drinking and hiring proctors Public Safety, as determined by the Graduate School.
- **Accessibility**
 - Student organizations are reminded that the University is bound by the Americans with Disabilities Act. As a part of Princeton University, student organizations must make every attempt to schedule events in locations accessible to persons with disabilities. Student organizations should find an accessible location on campus for their events. In specific cases where significant portions of the University community will be allowed to attend an event, the location is required to be accessible to persons with physical disabilities.
- **Event Policies and Guidelines**

- Graduate students organizing any event are expected to follow all [University rules](#) and regulations in addition to policies set by the Graduate School. Please be sure to review rules and regulations before planning an event and consult with the Office of Graduate Student Life on any questions you have regarding policies.
- **Contact**
 - For help with planning an event or any event related questions please contact [Dean Barkley-Jones](#).

PLANNING YOUR EVENT: PUBLICIZING AN EVENT

- **Email Announcements** - If you would like to advertise an event to the graduate student body or the larger Princeton community, there are several e-mail distribution lists for reaching various segments of the University community.
 - Graduate Student Government-Global: Broadcasts information about events and activities cosponsored by the Graduate Student Government. Maintained by the [Graduate Student Government](#).
 - Active E-list: Weekly list of University events open to all students (graduate and undergraduate). Events involving alcohol will not be included. Maintained by the Office of the Dean of Undergraduate Students and the Undergraduate Student Government. Send e-mail announcements to events@princeton.edu; include day, time, location, sponsor/club, contact information, and a brief (less than 50 words) synopsis of the event.
 - Student organizations may request to send an e-mail targeting specific segments of the graduate student community. Submit a request to [Dean Barkley-Jones](#) at least 2 weeks in advance.
 - Recognized graduate student organizations may also maintain their own e-mail listserv through OIT, to which students may voluntarily subscribe or unsubscribe. Please submit a request through [Service Now](#). Your request will be directed to Dean Barkley-Jones for approval.
- **Posters, Flyers and Notices**
 - **Where to post flyers:** outdoor kiosks, lampposts, and bulletin boards in dorm entryways, food services units, academic and administrative buildings as well as bulletin boards throughout campus
 - **Where NOT to post flyers:** On buildings, chain link fences, wood paneling, benches, sidewalks, roadways, the natural landscape (i.e., trees and grass), and any other location not included on the list above. For more information, please see sections [1.2.4](#) and [2.2.1](#) of *Rights, Rules, Responsibilities*.
 - The use of chalk and tape applied to University grounds and facilities is not permitted. Posters must contain contact information (The organization name, a contact person and a telephone number and/or Princeton email address).
 - Students should make arrangements to take down flyers after the event.
 - Please note that groups who do not comply with these rules may be reported to the Graduate School and the Department of Public Safety.
- **Other Ways to Promote your Events**
 - **Frist Electronic Message Board** - Recognized graduate student organizations may publicize upcoming events on the [electronic message board](#) on the North Plaza outside the Frist Campus Center. Requests must be made on-line and are subject to approval by the Frist Campus Center. Events must first be registered with the Graduate School.

- **Timeline** - is a software system developed by OIT that facilitates distribution of information about activities, events, deadlines, and announcements to the Princeton University community. For information on how to use Timeline, visit this [site](#).

PLANNING AN EVENT: CHECK LIST

- Once the decisions on date, time, location and content have been made, file all appropriate registration forms with the Student Affairs Office. Then, list the tasks to be accomplished and delegate them to committees or individuals. The following checklist is designed to keep you from forgetting anything of vital importance to your event.
 - **Publicity**
 - Who will design flyers? Invitations?
 - Place media ads or announcements.
 - Put up posters or flyers in designated posting areas.
 - Will there be any special gimmicks?
 - **Financial**
 - Will money be collected or tickets sold?
 - What equipment is needed (cash box, change, stamp, etc.)?
 - Who will collect money or tickets?
 - What deposits, checks, payments are needed at event? In advance?
 - Arrange security for the cash box and deposit.
 - **Security**
 - Is ID checking needed?
 - Will Public Safety coverage be required? How much does it cost?
 - Are proctors needed? Bartenders required?
 - Set up
 - Who will move furniture? Rearrange room? Unload cars? Carry equipment?
 - Who has a car?
 - Will you need extension cords? Extra power? Tables and chairs?
 - Will you need early access to the building or room?
 - **Decorations**
 - Bring equipment to be used (tape, scissors, etc).
 - Will a ladder be needed? Is one available?
 - Are flowers to be delivered? Arranged?
 - Are planned decorations permitted in facility (balloons, flammable materials)?
 - Is additional lighting required? Tablecloths?
 - **Refreshments**
 - Order food or obtain cash advance to purchase.
 - Obtain serving pieces (bowls, trays, etc).
 - Determine who will serve or replenish supplies at the event.
 - What dishes, cups, etc. will be needed for each person?
 - Decide who will clean and return any borrowed items.
 - **Clean Up**
 - Who will clean up? Remove trash? Put furniture back in original location?
 - Talk with facility manager to understand exactly what is expected of your group.
 - Have a facility manager check the area before you leave.

- **Final Touches**

Be sure that clean up is completed.

Leave the area as you found it, including replacement of furniture.

Remove supplies, food and equipment used for the program.

Clean and return all rented or borrowed items.

Send thank you notes, if appropriate.

Complete all financial transactions - deposit moneys, pay bills, submit necessary forms.

Evaluate the event and be prepared to give an accurate report at the next meeting of your organization.

RUNNING AN EVENT: PURCHASING FOOD AND SUPPLIES

- Once you have determined all the details of your event, you will need to start preparing for the event, which may include purchasing supplies and ordering from vendors.
- If you are having food at your event and it is on-campus, not in the graduate residences, you should contact catering or paper tiger to provide food for your event. Please note that some on campus venues require the use to university catering or paper tiger. Make sure you double check with the venue you are reserving.
 - [Princeton Campus Dining](#)
- If you are using an outside food vendor or if you are purchasing supplies that's not available through the Marketplace, you have the following options to purchase your items:
 - Student Life Departmental Credit Card - we strongly encourage student groups to use the departmental credit card to purchase food and supplies whenever possible. The amount of the credit card charge can be directly charged to your student group's chart string account. For further information and instructions and what can and cannot be purchased on the departmental credit card please contact Ellen Kellich at ekellich@princeton.edu or (609) 258-3028 at least two weeks in advance of your event date or earlier depending on the vendor.
 - Pay out-of-pocket for food or supplies and then submit an expense report in CONCUR to get reimbursed.
 - Have the food or supplies vendor send you an invoice and you can submit the invoice to Ellen Kellich in Clio Hall. The vendor may need to submit additional documentation if they have never done business with Princeton University. Ellen Kellich will advise you on the necessary paperwork. The invoice will be processed and payment from your chart string account will be sent to the vendor.
- [Marketplace](#) – you may purchase business materials and supplies through the Princeton online purchasing portal called the Marketplace. You have access to more than 450 contract suppliers with whom the University has term contract buying agreements, and discounts on hundreds of thousands of products and services.

IMPORTANT NOTE:

- **Princeton University is a non-profit, educational institution, retaining Federal Tax Exempt Status. Tax Exempt number: 22-73-0009F. Please click here for the [tax exemption form](#).**

RUNNING AN EVENT: HONORARIUMS AND PAYING INDEPENDENT CONTRACTORS

- **Honorarium** – is a onetime payment made for an academic activity or service for which fees are not traditionally required such as a guest speaker or presenter so long as the activity is open to students without charge. You will need to have the guest speaker or presenter complete the following forms and you will need to submit these forms to Ellen Kellich in Clio Hall. All forms can be found at: <https://finance.princeton.edu/forms/honorarium-acceptanceForm>
- U.S. Citizen/Permanent Resident – The Honorarium Acceptance form
 - For Foreign National – The Honorarium Acceptance Form
 - If the person is not in our system as a vendor, they must be added. Please provide Ellen Kellich with their email address when you submit the above paperwork. The guest speaker or presenter will then receive an email from Ellen Kellich and Princeton University’s Financial Service Center. They will need to follow the instructions in the email in order to receive payment. Payment cannot be made unless this step is completed.
 - A check will be mailed to the person
- **Independent Contractors** - an independent contractor is an individual who provides services to Princeton University and is not an employee: namely, a worker who should be paid under a 1099 (and not a W-2). More specifically, it is a worker who: (a) is engaged in an independently established profession or business (b) provides a service outside of the University’s usual course of business; and (c) is free from the University’s control or direction when providing services. Examples include hiring musicians, DJs, bands, and other performers for an event. To pay independent contractors you will need to submit the following forms to Ellen Kellich in Clio Hall.
 - [Entertainment Agreement Contract](#) (please contact [Dean Barkley-Jones](#) for assistance)
 - Invoice for service(s) rendered.
 - If the independent contractor is not in our system as a vendor, they must be added. Please provide Ellen Kellich with their email address when you submit the above paperwork. The independent contractor will then receive an email from Ellen Kellich and Princeton University’s Financial Service Center. They will need to follow the instructions in the email in order to receive payment. Payment cannot be made unless this step is completed.

IMPORTANT NOTES:

- **Out-of-pocket payments to guest speakers or independent contractors will not be reimbursed.**
- **Before entering into an agreement with a foreign national guest speaker or independent contractor please consult with Dean Barkley-Jones to determine whether or not it is legal to pay the individual or entity.**
- **If your group is bringing outside vendors or performers to campus, they must have an insurance policy that meets the university insurance standards- a \$1,000,000 policy. If they do not, your group will need to purchase an insurance policy for that event. Please check with your vendor or performer before you book them and check with Dean Barkley-Jones if you are not sure or need to purchase a policy. This policy does not apply to lectures.**
- **No student organization may sign a contract on behalf of his/her organization without first having Dean Barkley-Jones review the contract. Please note:**
 - **A contract is any document requiring signature for services or payment.**
 - **This process takes between 2-4 weeks depending on the complexity of the contract and/or the amount of funds committed.**

- For student organizations, the review and authorization process is provided by The Graduate School in consultation with the Office of General Counsel.
- Please do not make any offer or financial commitment verbally or in writing without the prior permission from The Graduate School.
- Please note these policies are in place to protect your individual liability. Failure to comply with these policies may result in your being held personally liable for the financial terms of the contract.

POST EVENT WRAP-UP: REIMBURSING STUDENTS USING CONCUR AND PAYING STUDENT

Reimbursing Student for Out-of-Pocket Expenses

All receipts are required and must be itemized, regardless of transaction amount.

Students requesting reimbursement must submit their own requests online through Concur; no one can submit the requests for another individual.

○ First set-up your CONCUR Profile

- You only have to set up your profile once, before you submit your first request for reimbursement
- Begin with the “Manage the Concur Profile” video and follow along, pausing as necessary to complete the steps. Video is available at:
http://upkdocs.princeton.edu/Prime/Manage_the_Concur_Profile/Index.html

Note: not all Concur functionality is enabled for students so some of the items in the video and on the profile will not apply. Also, some of the instructions make sense for employees, but not for students, so follow this written guide carefully and when the instruction here differs from the video, follow these directions.

- Go to www.princeton.edu/concur and sign in
 - **Travel Alert Section:** You can activate Triplt Pro, E-Receipts. Enable and register mobile device, and download the Concur app.
 - **Profile tab at the top:** enter personal information, email address, emergency contact info
 - **Default Approver**
 - From the Profile tab, click Expense Approvers on the left hand side under “Expense Settings”.
 - Type **Ellen Kellich’s name** in the field, select from the dropdown list. Click Save.
 - **Expense Delegate**
 - From the Profile tab, click Expense Delegates. Click Add.
 - Type your **Treasurer’s name** in the field and select from the dropdown list (if you are the Treasurer of your group then you don’t need to put in an Expense Delegate).
 - Check off “Can Prepare”, “Can View Receipts”, and “Receive Emails”. Click Save.
 - **Expense Information**
 - From the Profile tab, click Expense Information.
 - Enter your group chart-string account

○ Preparing your expense report in CONCUR

- **You should submit one expense report per student group you are requesting money from.** A report can have multiple charges, but they should all be coming from the same chart-string account (i.e. student group).
- Deadline for submitting an expense for reimbursement: you must submit an out-of-pocket expense for reimbursement **within 30 days of the transaction date.** If you submit it after 30 days, the request may be denied.
- Saving receipts to Concur for future use using the “Receipt Store”: if you anticipate using Concur often to request reimbursement, you should download the Concur app so you can easily save receipts on the go.
- Go to www.princeton.edu/concur and sign in.
 - Go to “Profile” tab and click on “Mobile Registration” in the secondary menu.
 - Create PIN and send a link to your mobile device to download the app.
 - You can take photos of receipts using your phone and they will populate in your Receipt Store.
- To prepare your request for reimbursement (“expense report”). From My Concur homepage, locate “Active Work” window on right side of screen click “New Expense Report”
- Fill in Report Header information
 - Report Name: Should include your name, group name, and the date you’re submitting the request. Example “J. Smith, Graduate Knitting Club, 9-2-17”
 - Enter an option in “Report Type” – if mostly domestic charges, put domestic. If mostly international, put international
 - Business Purpose: Enter summary information regarding the charges.
 - Trip ID: Enter your student group name
 - Department: insert your group’s department #.
 - Fund: insert your group’s fund information
 - Program: insert your group’s program information (NOTE: the majority of student groups only have a Department and Fund chart-string. Please leave Program blank if you were not given Department, Fund, & Program chart-string)
 - Click “Next”
- Enter a single expense
 - Select an expense type from the menu on the right hand side of the screen.
 - Enter relevant information like transaction date, vendor name, amount etc.
 - Business Purpose: Enter more specific information about the charge
 - Comment: If more information/explanation is needed, include it here
 - For group meals under 10 attendees, attendee names and positions are required. Add attendees in the bottom section of the Expense screen.
 - If prompted, itemize your expense: looking at your receipt, fill in the various amounts that contributed to the total.
 - Click “Save”.
 - Click “Attach Receipt” at the bottom of the screen.

* Upload a receipt image or retrieve a receipt from your Receipt Store.

* Click "Attach"

- When you're finished with one charge, you can add additional ones, provided you're requesting reimbursement from the same funding source.
Click "Submit Report" in the upper right corner of the screen.
- If you are a student organization officer and you are requesting reimbursement from your group's chart string account then your expense report will be reviewed and approved by Ellen Kellich. If you are requesting reimbursement from a group's chart string account and you are not a student organization officer for that group then Ellen Kellich will have the group's Treasurer review and confirm your reimbursement request before she can approve your reimbursement request.
- Tracking and Receiving your reimbursement
Be sure to sign into Concur often to check the status of the expense reports you've submitted in case your report is sent back to you requesting for clarification or for more documentation.
You can check the status of your report in the "Active Work" section of the My Concur homepage. When it says "Approved" you can expect your money shortly.
- When your reimbursement is approved by the Office of Finance and Treasury, you will receive it one of two ways:
 - If you're signed up for direct deposit, the money will go into your personal account
 - If you're not signed up for direct deposit, you will receive an email from Princeton letting you know you have a check for pickup at the Financial Service Center on the 7th floor of New South.

Paying Students for Work Performed at Graduate Student Organization Events

- Occasionally a student organization may hire current graduate students to work at an event, whether that may be to DJ at an event, serving food/drinks at an event or some other function during the course of an event. Please refer to the Graduate School Employment Policy [Employment | Graduate School \(princeton.edu\)](#). Remember, all students are responsible to following the graduate school employment policy. Students need to make sure they are eligible to work and are getting the appropriate approvals.

POST EVENT WRAP-UP: DEPOSITING FUNDS

- If you have collected money from your event, from an entry fee or ticket sales, you can deposit that money into your group's chart-string account.
- You can do that by completing the "Departmental Deposit" form and bring the completed form with the money to the Cashier's Office, on the 7th floor of New South.
 - [Departmental Deposit | Finance and Treasury \(princeton.edu\)](#)
- You can deposit Cash or Checks.
 - All checks should be made payable to "Princeton University" and not in the name of the student organization.

IMPORTANT NOTE: Please consult with Dean Barkley-Jones if you plan on charging any fee for an event.

THE FINE PRINT

- In addition to knowing how to run an event from start to finish, it is very important to make sure your group and your events are following all university policies.
- It is your responsibility to be aware of these policies and to be in compliance with them.
- Most importantly, if you don't know or aren't sure about a rule or policy, PLEASE ASK Dean Barkley-Jones! She is always more than happy to answer any questions you have.

THE FINE PRINT: RIGHTS, RULES, AND RESPONSIBILITIES

- All recognized graduate student organizations are governed by the policies outlined in Rights, Rules, Responsibilities (RRR). The current edition of RRR may be found at <http://www.princeton.edu/pub/rrr/index.xml>
 - While the mission of a graduate student organization may be very specific or cater to the interest of certain groups of students, membership in all organizations recognized by the Graduate School must be open to all students.
 - Recognized graduate student organizations may not exclude persons from participation in, deny persons the benefit of, or subject persons to discrimination under any of its educational programs or activities based on the person's beliefs or characteristics such as political views, religion, national or ethnic origin, race, color sex, sexual orientation, gender identity or expression, age, marital status, veteran status or disability.
 - Participation in a graduate student organization may only be limited through talent based auditions (singing, theater, dancing, writing).

THE FINE PRINT- ALCOHOL GUIDELINES

- Graduate students at Princeton University are expected to be acquainted with and to abide by both state and [University regulations](#) regarding the consumption of alcohol. They are also expected to be aware of the social, physiological and psychological consequences of excessive drinking in order to make responsible and informed decisions about the serving and consumption of alcohol. The University provides regular educational programs on alcohol and drug abuse, as well as counseling services.
- The University alcoholic beverage policy is designed to be consistent with the laws of the State of New Jersey which, in general, prohibit the consumption and serving of alcoholic beverages by and to persons under 21 years of age. The policy also reflects the need for mutual respect and personal responsibility within a diverse community. Students are responsible for their behavior, whether or not they are under the influence of alcohol. Under no circumstances will the consumption of alcohol constitute a mitigating circumstance when it contributes to the violation of University regulations.
- The University respects the right to privacy: its representatives will not enter dormitory rooms without substantive cause (i.e., without reasonable suspicion that University policies or regulations have been violated.) However, those individuals whose behavior infringes on the rights of others have, in essence, forfeited that privacy.

- Alcoholic beverages will not normally be provided at University events where persons under the legal drinking age for consumption of alcoholic beverages are present. Those who are of legal drinking age and who wish to sponsor campus events with alcohol must comply with the guidelines established by the Office of the Dean of the Graduate School.
- If given approval to serve alcoholic beverages, those organizing the event are responsible for ensuring that only those of legal drinking age are served. Availability of alcoholic beverages shall not be the primary focus of advertising for campus social events.
- It is the primary responsibility of those in the presence of a severely intoxicated person to contact appropriate University or local medical or safety personnel (proctors, deans, McCosh Health Center Staff, Princeton Medical Center Staff, or local police or members of the rescue squad.) Intoxication will not be grounds for disciplinary action. Contacting the Department of Public Safety for assistance in transporting a student in need of medical attention will not, in itself, lead to disciplinary action. Disciplinary action will occur only if other circumstances indicating a violation of University policy are observed. In such an instance, the fact that students initiated a call for assistance will be considered a mitigating circumstance.
- Guidelines
 - The sponsoring organization must submit an [Event Registration](#) Form to Dean Barkley-Jones at least three weeks prior to the event.
 - Functions which include the serving of alcoholic beverages should focus on activities and programs rather than on the consumption of alcohol. The advertising should reflect the purpose of the event, not the serving of alcohol.
 - When alcoholic beverages are served at an event, non-alcoholic beverages (such as soft drinks and water) should also be available and visible.
 - Events at which alcoholic beverages are served should include the serving of food in visible, accessible areas; the quantity of salted foods, which result in thirst and additional drinking, should be limited.
 - Students are strongly urged to discourage peers from drinking excessively. When drinking becomes excessive and may result in destructive behavior or behavior which may threaten the safety of the individual or of others, those responsible for the event should notify a Public Safety Officer or contact Public Safety at 609-258-3333 for assistance.
 - If the organization will charge for entry to the event or for alcoholic beverages, the New Jersey Division of Alcoholic Beverage Control's "[Special Permit for Social Affairs](#)" must be filed with the Graduate School, 109 Clio Hall, and with the State Office in Trenton in a timely manner. State approval will come in the form of a license, which will permit the organization to charge for entry to the event or for alcoholic beverages. To meet state requirements, each attendee must provide proof of legal drinking age to an "ID checker" at the door and/or at the bar area.
 - If persons under 21 years of age will be present at the event, alcohol will be served in a designated area (e.g., beer garden) where access and consumption can be restricted to persons of legal drinking age.
 - The Assistant Dean for Student Affairs, in consultation with the Department of Public Safety and others, will determine what security/safety measures will be necessary (e.g., proctor, uniformed officer) for the event.
 - Although permission is not required for students over 21 years of age to host private parties in their apartments, they are responsible for following all alcohol guidelines.

THE FINE PRINT- NOISE POLICY

- The university noise policy states that events can go until midnight on weekdays and until 2 am on weekends, Friday and Saturday Nights.
- However, students have the right to a reasonably quiet environment and can call public safety within those hours if they think the noise level is unreasonable.
- Public Safety may come and ask you to lower your volume. If they are called twice, they will ask you to end your event.

THE FINE PRINT- FUNDRAISING POLICY

- In an effort to assist student groups that wish to participate in fundraising relief efforts in response to natural disasters around the world or in support of other humanitarian efforts the Office of the Dean of Undergraduate Students and the Graduate School have developed the following guidelines:
 - Reach out to the [Pace Center for Civil Engagement](#) to illuminate potential collaborations with others on campus, provide you resources for ways you might want to respond and help you avoid common pitfalls and ethical dilemmas often involved in systemic responses to world events.
 - These efforts should be conducted under the auspices of a recognized student organization. Existing organizations are permitted to conduct these efforts as well as groups that wish to become recognized solely for this purpose.
 - Donation by check should be strongly encouraged. Checks must be made out directly to the external relief agency (i.e., Red Cross, CARE). This method of donation is also useful for the donor as he/she has the record of a cancelled check, should it be desired, for tax purposes.
 - Should an organization need to accept cash contributions, it should articulate procedures that ensure the security and proper accounting of the cash collected and reviews these procedures with Dean Barkley-Jones. Cash may not be deposited in a University account, but should be redeemed at a local bank for a cashier's check made out to the external relief organization.
 - Funds may not be solicited from University departments, programs, organizations etc.
 - Student organization funds may be used to advertise relief efforts or to provide information or other educational materials to members of the University community regarding relief and fundraising efforts or for other related University-based charges or costs. The amount of these expenditures should be modest in comparison to the amount raised directly for the relief effort.
 - Donations may not be solicited through charges to a student's University account.
 - Should recognized student organizations raising relief funds wish to set up tables, booths, etc., they should obtain permission from those persons in charge of the facility at which they wish to solicit and from the Graduate School by submitting an Event Registration Form.

THE FINE PRINT – GUIDELINES RELATING TO TAX-EXEMPT STATUS OF THE UNIVERSITY AND POLITICAL ACTIVITIES

- Please note the guidelines relating to the tax-exempt status of the university and political activities [1.5](#) in Rights, Rules, and Responsibilities.

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- Once again, we have not covered every university regulation or policy in this guide; if you are unsure about something, PLEASE ASK! It is always better to be safe than sorry!

THANK YOU

- Thank you again for the work you do to help enhance graduate student life and foster a sense of community! We appreciate all your efforts!

The Graduate Student Affairs Team:

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