

Woodrow Wilson Fellowship Program VISA Cards and Logging Expenses

The most common and simplest way for you to access your Woodrow Wilson funds for approved expenses is through a prepaid VISA card provided by the Director of Undergraduate Research. These cards are loaded up in advance with the amount you are approved to spend, based on your approved budget and any budget restrictions. For example, if your project requires you to purchase particular books, you can have those costs approved by your mentor and by the Director, and then go to any brick-and-mortar or online bookstore and buy them with your VISA card.

To activate the card once you receive it, in lieu of the last four digits of your Social Security number, use the last four digits of the phone number you provided to the Woodrow Wilson program when your card was ordered.

Updating Your Budget

Cards will be ordered when you are admitted to the program, but will not be distributed to you until you have an approved budget. The distribution of funds to those cards will happen incrementally each year, even though you will be updating your multi-year budget annually. Once again, a budget, like all elements of your research, is a living document that must constantly be reevaluated and adapted due to changing markets and plans. Your original and updated budgets can be approved by your mentor via email.

If you run into unexpected costs and will need more funds than expected loaded onto your card, you must immediately update your budget to reflect these new costs and notify the Director of Undergraduate Research. Any budget changes that exceed 25% of the original mentor-approved costs will require updated mentor approval as well. Fund transfers typically take place on the 1st and 15th of the month; please be aware that emergency transfers may take time to process.

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Keeping a Log

You are responsible for turning in receipts for all purchases on your card and only using it for approved purchases. In the rare circumstance that you need cash for an approved expense, the card can be used at an ATM for withdrawals; however, note that you are still responsible for providing receipts for cash purchases.

Because Woodrow Wilson funds are granted to you for specific research-related costs, you are responsible for carefully logging and documenting any purchases you make with fellowship funds. You should keep careful notes of each purchase you make using the **Expense Log** and retain receipts for any expenses over \$25. (Note that you can't split charges to keep costs under \$25.) These receipts must be scanned and uploaded to your individual WW box within 30 days along with a completed Expense Log. If you lose a receipt or one is not available for a particular expense, you must fill out and upload a **Missing Receipt Affidavit**. These forms are available in the Woodrow Wilson group box.

If expenses are not properly documented within 30 days, they will be considered invalid and one or more of the following will happen, depending on the severity of the situation:

1. The expense will be charged back to your student account, so you will have to pay it back yourself.
2. You may lose access to your VISA card.
3. In extreme cases, your Woodrow Wilson award itself may be rescinded.

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Digital Receipt Records

Taking high-quality scans or pictures of your receipts (in addition to retaining the physical copies) is always smart; the Director will never require a physical copy of the receipt, but rather a digital copy uploaded to your personal box. Unreadable, cropped, altered, or otherwise negatively impacted images and receipts will not be accepted and you will have to file a missing receipt form, so please make sure your digital copy is clear before uploading it.

You can use a desktop scanner or most modern smartphones for this. There are also apps like Scanner For Me (iOS) to give you cleaner copies and facilitate organizing them carefully; these apps are preferable to simply taking a picture because they use OCR and other technology to clean up the images.

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Allowable and Unallowable Expenses

Here are some samples of expenses that would be allowable and unallowable:

Allowable Expenses	Unallowable Expenses
Research-related and approved items	Anything research-related but unapproved
Travel to an approved conference where you are presenting (never air travel)	Travel to a conference where you are not presenting
Approved conference registration	A tour of the city where a conference is held
Food following JHU per diem calculations during a research trip	Food for mentors, friends, or anyone else.
A shuttle from the airport to the hotel for a conference	A taxi to go meet friends in a city where you're researching
Gift cards for survey participants	Gifts to mentors and colleagues

*These are merely examples. The list and types of purchases that exist is too exhaustive. When in doubt, email Strobach@jhu.edu.

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Accidental/Mistaken Purchases

Sometimes, due to stored credit cards on computers and other human error, your WW card may have been used for expenses not approved or related to your research. If this is the case, you must report it to the director so that we can work out a suitable form of reconciliation so that your research funds have never been used inappropriately. You must also record the mistaken transaction and relevant receipts on your transaction log, so that it can be reconciled accordingly.

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Cardholder Responsibilities

When issued a Woodrow Wilson VISA card, you are responsible for all charges made on it. Treat it as you would a credit or debit card issued in your name. This means:

1. Do not let anyone else use your card. This includes parents or guardians and mentors.
2. When possible, go to a Bank of America branch location to withdraw exact amounts needed instead of ATM withdrawals over the amount.
3. If your card is lost or stolen, report it immediately to the Director of Undergraduate Research and to the relevant police department. You will have to submit a police report if your card is reported lost.
4. If you fail to follow these guidelines, you may be held responsible for unapproved charges. These charges will be charged back to your student account.
5. You are responsible for reporting the funds, as need be, for tax and Free Application for Federal Student Aid (FAFSA) purposes.

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Agreement

Please sign below to indicate that you understand the rules and responsibilities laid out in this document and agree to adhere to them. You also agree that you understand these rules may change at the Director’s discretion, you will be notified of changes, and you will be responsible for adapting to those changes or updates.

Cardholder Signature Date

Director Signature Date

Sample Card Use Scenarios

Scenario 1

Imagine you are doing research in Mexico and a local food cart where you want to get lunch doesn't accept cards, so you take \$20 out at a local ATM. You buy lunch, and it costs the equivalent of \$8 USD. If you are unable to get a receipt from the taco truck, you must complete a missing receipt form explaining the purchase. You must also track how you have used the remaining \$12 (as most ATMs distribute \$20s) for valid research purchases; a failure at any of these points will have repercussions.

Scenario 2

Imagine you are paying rent for living expenses over the summer while you are doing research. Your rent is \$805 and this budget has been approved by your mentor and the Director. Your landlord does not accept VISA cards or cash.

You must deposit the funds into your own checking account (after taking out cash at an ATM) and write your landlord a check. You must provide a copy of all of the following:

1. Your lease or sublet agreement.
2. The ATM cash withdrawal receipts.
3. A copy of the check that has been processed by your bank from the landlord, or a signed and dated receipt from the landlord.

Just as in Scenario 1 above, it is likely in this case that you will have to take out \$820 at an ATM and track the extra \$15 to make sure it is used for valid research purchases. Bear in mind as well that ATMs and your card have a daily withdrawal limit, so you will need to spread your monthly withdrawal over a few days; keep track of every transaction and retain every ATM receipt.

Scenario 3

Imagine you have been approved to register online for a conference you have been accepted to present at. The website will not accept your VISA card.

You must contact the Director so that she can make the purchase for you directly. (The Director has access to a different type of purchasing card.) You are NOT allowed to make the purchase via another means on your own and expect to reimburse yourself. This is because ATMs typically distribute in 20s and it is very unlikely you will be able to withdraw the exact amount you need.

Scenario 4

Imagine you are checking into your hotel in India for your field research. You have a sudden emergency and the hotel cannot process your VISA card. You use a backup personal form of payment.

The process for reimbursing yourself is to file a reimbursement request with the Dean's Office and the Director. You are not authorized to provide yourself cash reimbursement. Note that most hotel costs should be paid well in advance, so this type of emergency is very atypical.

When in doubt...email Strobach@jhu.edu.

