

Procedural and Operational Manual for Fellowship Program

(1) Basic Management

- ① FS students shall manage their allocated research fund on their own by using “Budget Management File” distributed by the FS Support Office.
- ② When using the fund, please fill out a request for approval in advance and obtain approval from your supervisor.
- ③ The Excel file “Budget Management File” should be submitted to the FS Support Office when updated (submit them via email at the end of the month).
- ④ Requests for approval and reports should be submitted to your supervisor and the FS Support Office. Be sure to submit both original documents affixed with supervisor’s seal of approval and electronic data (via email).
- ⑤ Please consult with the FS office in advance if you would like to utilize the fund for other purposes than travelling, participating in academic conference, or purchasing goods/items for your research.

(2) Scope of Use (Travel Expenses, Conference participation fees)

1. Coverage of Travel Expenses

Travel expenses cover transportation, accommodation, and academic conference participation fee.

- ① Accommodations
Actual expenses (there is a limit set by destinations)
- ② Daily allowance is not paid.
- ③ Costs for obtaining insurance, participating in get-togethers, meals, and passport/VISA fees are not covered.
- ④ In cases where accommodation expenses include breakfast, the cost for breakfast will be deducted from the total accommodation expenses.

2. Payment Method

The total amount will be transferred to your bank account at a later date.

In cases where you wish to be paid in advance for overseas travel etc., please apply for an advance payment by three weeks before the day you wish to have the travel expenses transferred to your bank account.

3. How to use the fund for Travel Expenses

- ① Be sure to fill out a request for approval and obtain approval from your supervisor in advance.
- ② When participating in an academic conference, submit a conference brochure (which shows

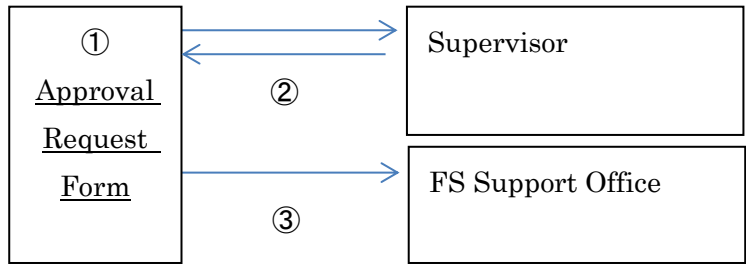
the dates, venue, and topics of the conference).

- ③ When claiming for the reimbursement of academic conference participation fees, submit a proof which shows the amount paid, such as the receipt or bank transfer form.
- ④ For domestic accommodation fees, the actual expenses will be reimbursed. Submit the accommodation receipt to the FS Support Office. (There is a limit set by destinations. Please see separate sheet: "Details of the reimbursable travel expenses".)
- ⑤ In cases where a student discount can be applied, transportation expenses after deducting the student discount will be reimbursed. Use student discounts when available.
- ⑥ When traveling by air, purchase discount air tickets (basically economy-class flights with a round trip discount).
- ⑦ When traveling by air, the quotation, the receipt, and the air ticket stubs or a proof of travel should be submitted.
- ⑧ Submit a report to your supervisor and obtain their seal of approval, then forward the document to the FS Support Office within a week after returning to Japan.
- ⑨ It is not allowed to rent a car. Students are not expected to travel by driving a car themselves.
- ⑩ It is not allowed to take a taxi (unless you obtain approval in advance).
- ⑪ Travel expenses cover the costs of required travel between the departing point and the place of business. For trips that require overnight accommodation, transportation fees between the place of business and your hotel will also be reimbursed as incidental expenses. In cases you have multiple business during a trip, the actual expenses for the travel between the place of business A and the place of business B will be reimbursed.
- ⑫ Receipts for accommodations and academic conference participation fees should bear the name of the payer (your name).
- ⑬ For all travels, you need to obtain **approval from the dean of the graduate school you belong to**. In order to complete the necessary procedures to obtain approval, you must submit the required documents (request for approval etc.) to the FS Support Office **by a week before the day of departure**.
- ⑭ When you need traveling expenses to be paid in advance, please apply for an advance payment to the FS Support Office by **three weeks before** the day you wish to have the expenses transferred to your bank account.
- ⑮ For overseas travels, you must obtain "**disaster and accident insurance for student education and research**" and "**overseas travelers' personal accident insurance**".
* Payments for your personal insurances are not covered by the fund.

<Procedures>

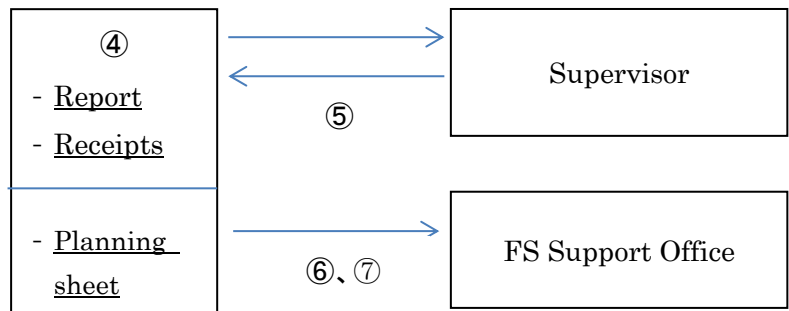
[Before travel]

- ① Plan a travel budget. Confirm the budget balance using the Excel worksheet "Fellowship Program: Planning sheet for research and travel expenses" in "Budget Management File".
- ② Submit a request for approval of travel and obtain the seal of approval from your supervisor.
- ③ Submit the approved request to the FS Support office in original and electronic form.



[After travel]

- ④ When there is a change in travel expenses, revise the amount on the request for approval accordingly.
- ⑤ Within a week after returning to the university, complete the travel report and submit it to supervisor and obtain their seal of approval.
- ⑥ Submit the report to the FS Support Office in original and electronic form along with the receipts.
- ⑦ Enter the amount of travel expenses on “Planning sheet for research and travel expenses” in “Budget Management File”, and submit the file to the FS Support Office.



4. Documents to be submitted

<Domestic Travel>

[Before travel]

	Documents to be submitted		Submit to	
			FS Support Office	Supervisor
1	“Fellowship Program: Request for Approval of Domestic Travel” (Original)	It should bear your supervisor's seal.	○	Obtain seal of approval
2	“Fellowship Program: Request for Approval of Domestic Travel” (convert to PDF)	Submit it via email to the FS support office.	○	○

3	Academic conference brochure	When participating in an academic conference, submit an evidence that shows the dates, venue, and participation fees of the conference.	<input type="radio"/>	—
4	Quotation for Accommodation (Booking confirmation)	When overnight accommodation is required	<input type="radio"/>	—
5	Quotation and Receipt for Airfare (Original)	When traveling by air	<input type="radio"/>	—

[After travel]

	Documents to be submitted		Submit to	
			FS Support Office	Supervisor
6	“Fellowship Program: Domestic Travel Report” (Original)	It should bear your supervisor's seal.	<input type="radio"/>	Obtain seal of approval
7	“Fellowship Program: Domestic Travel Report” (convert to PDF)	Submit it via email to the FS support office.	<input type="radio"/>	<input type="radio"/>
8	Receipt for accommodation (Original)	For travels that require overnight accommodation, the receipt should bear the name of the payer (your name).	<input type="radio"/>	—
9	An original document that shows the amount of bank transfer and the transfer destination, such as the receipt for academic conference participation fees or bank transfer form	When claiming for the reimbursement of fees to participate in an academic conference, receipts should bear the name of the payer (your name).	<input type="radio"/>	—
10	Boarding ticket stubs etc. (Original)	When traveling by air	<input type="radio"/>	—

<Overseas Travel>

[Before travel]

	Documents to be submitted		Submit to	
			FS Support Office	Supervisor
1	Itinerary	An itinerary created by a travel agency	<input type="radio"/>	—

2	Quotation for travel (Booking confirmation)	A proof which shows airfares or quotation provided by a travel agency.	<input type="radio"/>	—
3	“Fellowship Program: Request for Approval of Domestic Travel” and “Fellowship Program: Overseas Travel Schedule” (Original)	They should bear your supervisor's seal.	<input type="radio"/>	Obtain seal of approval
4	“Fellowship Program: Request for Approval of Domestic Travel” and “Fellowship Program: Overseas Travel Schedule” (convert to PDF)	Submit them via email.	<input type="radio"/>	<input type="radio"/>
5	Invitation letter	When you have an invitation letter from the host organization	<input type="radio"/>	—
6	Certificate of disaster and accident insurance for student education and research		<input type="radio"/>	—
7	Overseas travelers' personal accident insurance certificate		<input type="radio"/>	—

[After travel]

	Documents to be submitted		Submit to	
			FS Support Office	Supervisor
8	Receipts for Airfare and Accommodation (Credit card statement)	Original	<input type="radio"/>	—
9	Air ticket stubs etc.	Original	<input type="radio"/>	—
10	“Fellowship Program: Overseas Travel Report” (Original)	It should bear your supervisor's seal of approval.	<input type="radio"/>	Obtain seal of approval
11	“Fellowship Program: Overseas Travel Report” (convert to PDF)	Submit it via email to the FS support office.	<input type="radio"/>	<input type="radio"/>

<Participation in academic conferences>

When participating in an academic conference, please submit the following documents in addition to the aforementioned documents:

	Documents to be submitted		Submit to	
			FS Support Office	Supervisor
1	Academic conference brochure, etc.	A copy of pages that show the name, dates, venue, and participation fees of the conference	○	—
2	Receipt for academic conference participation fees, etc.	<Advance payment> A proof that shows the amount billed and the bank transfer destination, such as the invoice. <In cases students initially make the payment on behalf> Original receipt, credit card statement, etc.	○	—
3	A proof that shows the cost for meals at the conference (e.g. conference brochure)	When meals are included in the participation fees (The cost of meals is not covered by the fund.)	○	—

* Fees for get-togethers are not covered by the fund.

(3) Scope of Use (Research Expenses)

1. Coverage of the Student Research Expenses

Expenses for purchasing books or magazines that are in line with the purpose of the fellowship program, and other expenses related to your research.

* Each product should be 100,000 yen or less in principle.

2. Payment Method

The University pays suppliers for purchases at a later date. **It is not allowed for FS students to purchase goods by cash on behalf of the university (in this case the payment will not be reimbursed).**

* Payment Condition: Closings take place at the end of each month with payments made the following month.

3. How to use the fund for Research Expenses

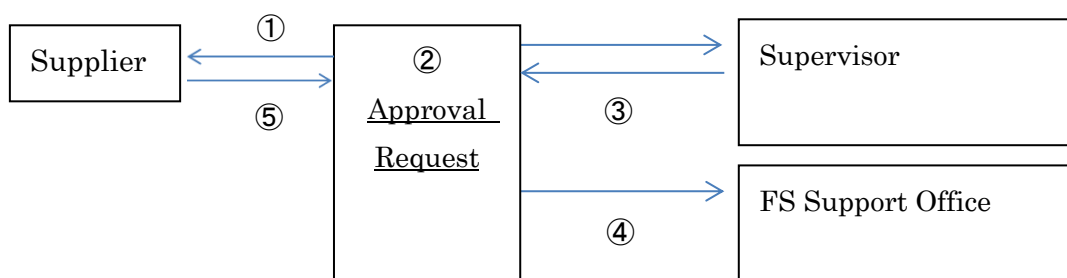
- ① The FS Support Office is in charge of proceeding the payment utilizing the fund.
- ② Be sure to obtain the **quotation, statement of delivery, and Invoice** from each supplier.

- ③ **Purchases by cash are not allowed.** Since payment will be made in accordance with the School Fund Regulations (e.g. payment is made at a later date by the University), place orders with suppliers who accept the payment system of the University.
- ④ Online purchases are not allowed in principle. However, if suppliers can accept the deferred payment system of the University, online purchases from such suppliers are allowed. (Online purchases from suppliers who accept orders only on an advance-payment basis and who do not issue quotation, statement of delivery or invoice, such as Amazon, are not allowed.)
- ⑤ When using the co-op store at OPU, please tell a clerk that payment for the purchase will be made by the university with the school fund at a later date. Inspection of the purchased item is required; please ask and follow their instructions.
- ⑥ In cases of purchasing goods, the statement of delivery should bear the inspection stamp of the Acceptance Inspection Center, your supervisor's seal, and the seal of the person placing the order (your seal).

<Procedures>

[Until delivery]

- ① Make a purchase plan. Confirm the budget balance using the Planning sheet in the Excel file "Budget Management File".
- ② Obtain the quotation from supplier.
- ③ Fill out "Fellowship Program: Request for approval of Research Expenses".
- ④ Submit "Fellowship Program: Request for approval of Research Expenses" to your supervisor and obtain seal of approval. Then submit the approved request to the FS Support Office.
- ⑤ Place an order with the supplier.

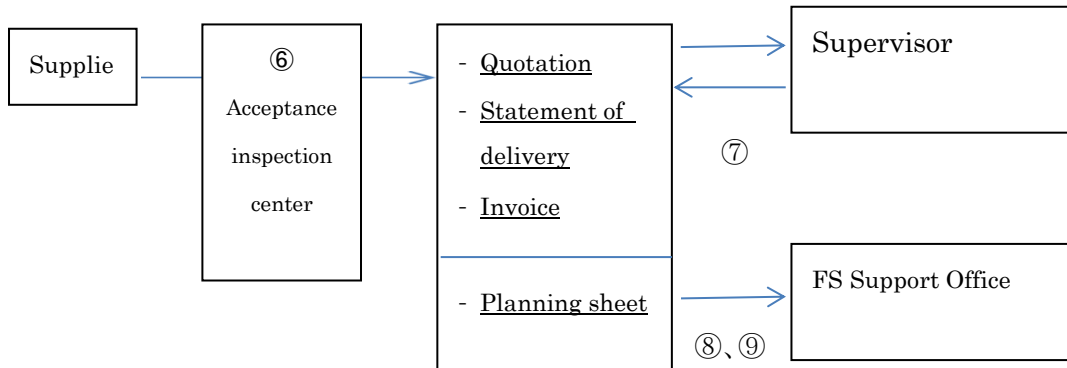


[After delivery]

- ⑥ Receive the statement of delivery and invoice from the supplier. Obtain an inspection stamp on the statement of delivery at the Acceptance Inspection Center.
- ⑦ Confirm the statement of delivery, then obtain your supervisor's seal of confirmation and affix your own seal on the statement of delivery.
- ⑧ Submit the quotation, statement of delivery (affixed with the inspection stamp, supervisor's seal, and your seal), and invoice to the FS Support Office. For the statement of delivery and invoice, submit the originals. In cases you purchase books, please bring them to FS Support Office for registration. All the books must be returned to the FS Support Office before you

leave the FS Program.

- ⑨ Enter the amount used on the worksheet “Fellowship Program: Planning sheet for research and travel expenses” and submit the excel file to the FS Support Office.



4. Documents to be submitted

	Documents to be submitted		Submit to	
			FS Support Office	Supervisor
1	“Fellowship Program: Request for Approval of Research Expenses” (Original)	It should bear your supervisor's seal of approval. (Enter the date of approval).	<input type="radio"/>	Obtain seal of approval
2	“Fellowship Program: Request for Approval of Research Expenses” (Excel file)	Submit it via email.	<input type="radio"/>	<input type="radio"/>
3	Quotation (Original. If it is difficult to obtain the original, a fax or a copy is also acceptable.)	Obtain it from the supplier (before placing an order).	<input type="radio"/>	—
4	Statement of delivery (Original)	Obtain it from the supplier (at the time of the delivery). The affixation of the inspection stamp of the Acceptance Inspection Center, your supervisor's seal, and your own seal is required.	<input type="radio"/>	Obtain seal of approval
5	Invoice (Original)	Obtain it from the supplier (at the time of the delivery or after delivery)	<input type="radio"/>	—

5. How to obtain inspection stamp

There are the following three methods:

- A. Ask the supplier to obtain the inspection stamp by going through the Acceptance Inspection Center at the time of the delivery of the goods. Designate that delivery should be made via the Acceptance Inspection Center in the address.

e.g. [XX Laboratory, Graduate School of XX \(via the Acceptance Inspection Center\)](#)
1-1, Gakuen-cho, Naka-ku, Sakai

- B. Bring the purchased items to the Acceptance Inspection Center yourself and have the inspection stamp affixed on the statement of delivery.

[Location of the Acceptance Inspection Center:](#)

[Nakamozu Campus \(*the west side of B4, 072-254-9673 <Ext:4873>\)](#)

[Habikino Campus \(Office, 072-950-2959\(Ext:1522\)](#)

[Rinku Campus\(Office:072-463-584<Ext:2108\)](#)

- C. On-site inspection

You can ask for an on-site inspection in the following cases:

- Purchased item is difficult to carry (too heavy/large)
- Payments are made for services (Proofreading of English documents or data analysis, etc.)
- Purchased software is downloaded or in CD-ROM form

(4) Distributed Files

Use the following forms when managing and using the fund:

* Excel forms are distributed by the FS Support Office or download from web site below

Website: http://fellowship-program.osakafu-u.ac.jp/fellowship_students/

1. Budget Management File

- ① Please utilize this file to manage your budget appropriately.

When submitting, modify the file name to "FS number ("S" or "M" + last three digits)_Name_Budget Management File_Submitted in (month)".

* Replace the FS number, name, and the month with your own.

e.g. *FSM21001 ⇒ "M001_Name_Management Sheet_Submitted in May"*

FSS21001 ⇒ "S001_Name_Management Sheet_Submitted in May"

- ② Contents of the file

- Fellowship Program: Research and Travel Expenses Budget Management Sheet (Budget Management Sheet)

This is a sheet for entering the usage details of the research and travel expenses and managing your budget. (Pay attention to the balance.)

- Fellowship Program: Planning sheet for research and travel expenses (Planning sheet)

This is a sheet for numbering plans to use the research fund and allocating the budget to

each plan.

- Fellowship Program: Research Expenses Mid-term Review (Midterm Review sheet)

This sheet is used for mid-term review on the travel and research expenses

③ Submission

Budget Management File should be submitted via email to the FS Support Office when a FS student utilizes their fund or upon request.

2. Requests for Approval

- ① Please utilize these files to obtain approval for expenses.

When submitting the files, modify the name as follows:

- Request for Approval of Research Expenses

-----"FS number (last 6 digits starting with "M" or "S")_Name_Request for Approval of Research Expenses (No.)"

- Request for Approval of Domestic Travel

-----"FS number (last 6 digits starting with "M" or "S")_Name_Request for Approval of Domestic Travel (No.)"

- Request for Approval of Overseas Travel

-----"FS number (last 6 digits starting with "M" or "S")_Request for Approval of Overseas Travel (No.)"

* Replace the FS number, name, and the number with your own.

e.g. FSM21001 ⇒ M21001_Name_Overseas trip approval request (No. 1)

- ② Points to be noted when filling out the forms

- a. Plan No.

Enter the plan number assigned on "Fellowship Program: Planning sheet for research and travel expenses". Make sure to enter the corresponding number to use the fund in a coordinated way.

- b. Management No.

Enter the management number assigned on "Fellowship Program: Planning sheet for research and travel expenses". Ensure that the amount used in the management file corresponds to the amount in the request for approval.

(5) Note

- ① When there is a change in travel or research expenses, be sure to make corrections in the request for approval and Budget Management File. Please manage the Budget Management File carefully; if you forget to make a correction, the budget balance will not be accurate.
- ② In principle, the original document should be submitted for quotations, statements of delivery, and invoices. However, for quotations, a fax or copy is also acceptable if the original document is difficult to obtain.
- ③ The fund can be used only in the school year (from April to March of the following year). They

cannot be carried over to the next school year or paid in advance.

- ④ The fund cannot be used with other budget.
- ⑤ Please refrain from intensive purchasing at the end of the school year (February and March). Please manage your budget in a coordinated way.
- ⑥ Please fill out the sheet “Research Expenses Mid-term Review” in Budget Management File and submit to the FS Support Office in October-December for checking.

(6) Support System of the FS Support Office

The following members in the FS Support Office will check the documents submitted by FS students and perform the settlement process. Please submit the required documents to them in a timely manner.

Imagaki(Ms), Kasho(Ms)

TEL:072-254-9843 (ext.3632)

E-mail: fellow-opu@ao.osakafu-u.ac.jp