



## Foundation Web Invoicing / Expenditure Procedures

### About the Hunter College Foundation

#### Mission Statement

The mission of the Hunter College Foundation (HCF) is to enhance Hunter College's (HC) position as a premiere public educational institution.

Hunter College is comprised of the School of the Arts & Sciences, School of Education, Silberman School of Social Work, Schools of the Health Professions, Hunter College High School, and Hunter College Elementary School.

To accomplish this mission, we:

- Actively promote Hunter College, including all of its schools, programs, Centers, and campuses
- Cultivate relationships that lead to funding
- Engage current and potential donors in the life of the College
- Manage investments judiciously
- Ensure that restricted funds are utilized for donor-requested purposes

Areas of support include:

- Faculty recruitment, development, and retention
- Access for qualified students, including scholarships and fellowships
- Student support services
- Program development
- Materials, technology, and equipment
- Facility development and maintenance

The Hunter College Foundation Board consists of a select number of outstanding alumni and distinguished community and business leaders who are committed to help raise the College's public image and raise funds to further strengthen the institution.

The Hunter College Foundation, Inc., is a charitable corporation [501(c)(3) organization] which receives and administers private contributions made in support of Hunter College, CUNY. Contributions to the Foundations are acknowledged as tax deductible to donors under the Internal Revenue Service Code.

**All expenditures of the Foundation funds must be consistent with the intention of the donor and mission of the Foundation.**

## **General Guidelines for Fund Disbursements**

### **Submissions:**

- **Deadlines**- check Request Forms must be submitted via Web Invoicing at [https://feweb.hunter.cuny.edu/wp\\_hcf](https://feweb.hunter.cuny.edu/wp_hcf). The check will be ready approximately 14 business days after the final approval. Reimbursement requests should be submitted no more than **30 (thirty) days** after the expense was incurred.
- If the **vendor or person** who needs to be reimbursed does not exist in our database, it is responsibility of the preparer to fill the New Vendor Form and to submit it prior to creating the check request. The preparer will not be able to process the check request without the step mentioned above.
- **Authorized Signatory** – expenses may only be approved by the signatory on the account or their designee.
- **Supporting Documents** – All necessary supporting documents must be submitted along with check request or the check request will be returned to the preparer.

### **Type of expenses (definition and restrictions for each):**

1. **Fellowship/Award/ Internship** - Fellowship/Award/Internship provide money that does not have to be repaid and usually is awarded on the basis of academic merit but can also be awarded based on financial need. Some are designed to help students as they begin their college careers; others are awarded as they progress in their major — be it the arts, sciences, or the humanities. Awards may sometimes be given to faculty as well.
  - **Supporting documents:**
    - Copy of Hunter ID
    - Copy of Social Security card or signed IRS Form W-9
    - Mailing address
    - Evidence that the scholar recipient was selected and was informed of being selected (award letter)
    - For **internships**, include a signed statement of completion from the student's supervisor
    - For **awards** to faculty, IRS form 1099 will be issued by the Foundation and sent to the recipient
2. **Scholarship** - The Hunter College Foundation offers a number of privately endowed or restricted scholarship funds administered by the Office of Financial Aid. HCF scholarships are awarded to students who have shown a high level of academic performance. Scholarships are also awarded based on financial need, and some are based on specific criteria such as high school attended, special skills or abilities. Students who are interested in applying for Hunter College Scholarships must complete the Free Application for Federal Student Aid (FAFSA). Students should refer to information available on line at <http://www.hunter.cuny.edu/finaid>. Scholarship awards

will be credited toward students' tuition and fees. Students should not be informed that they are receiving cash scholarship funds.

3. **Honorarium** - An honorarium is a speaking fee or compensation received from an outside entity (other than regular employment of this person) in consideration for writing an article or reimbursement for travel expenses not related to official duties. Examples of honoraria include:

- compensation for delivering a speech
- compensation for writing an article
- compensation for a serving on a panel
- compensation that is made as a gratuity or an award of honor

○ **Supporting documents:**

- Copy of Social Security Card or signed IRS Form W9 (If the payment is recurring Social Security number or IRS Form W9 form only needs to be provided with the initial request)
- Evidence of approval by authorized Hunter representative or invitation to the payee to participate to the event (honorarium form, email invite with dates and amount of honorarium)
- Event brochure showing the date of the event and Hunter affiliation (Hunter College department, etc.)

4. **Royalty payment** - A royalty payment is made to the legal owner of a property, patent, copyrighted work or franchise by those who wish to make use of it. In most cases, royalties are designed to compensate the owner for the asset's use, and are legally binding.

○ **Supporting documents:**

- Evidence of agreement to use the legal owner's work
- Event brochure showing the date of the event and Hunter affiliation (Hunter College department, etc.)

5. **Reimbursement** - The Hunter College Foundation reimburses employees, contractors and students for necessary expenses incurred on behalf of HCF and HC. These expenses will relate most frequently to, but are not limited to, transportation, lodging and food. Unless otherwise approved by the Vice President of Institutional Advancement in advance.

**5.1. If the reimbursement/expense is related to department operations or to a Hunter College or Hunter College Foundation event:**

○ **Supporting Documents**

- Maximum of **10 (ten) receipts** per check request are allowed
- Scan of the original itemized/detailed receipts for the expenses attached to A4 (8.5" x11") format paper
- If the receipts are **more than 2 (two)**, a note/spreadsheet describing each expense and amount matching with the receipt is requested
- If paid by credit card, proof that the person to be reimbursed paid- credit card statement showing the expenses and dates
- For event related expenses: Event brochure showing the date of the event and Hunter affiliation (Hunter College department, etc.)

**5.2. If the reimbursement/expense is related to a travel and lodging:**

○ **Supporting Documents**

- Maximum of **10 (ten) itemized/detailed receipts** per check request are allowed
- Scan of the original itemized/detailed receipts for the expenses attached to A4 (8.5" x11") format paper
- If the receipts are more than 3 a note/spreadsheet describing each expense and amount matching with the receipt is requested
- If food receipts contain alcohol, separate out those charges from the rest of the receipt amount. Submit as a separate line in WI (code: Beverage)
- Proof that the reimbursed person paid- credit card statement showing the expenses and dates
- Event brochure showing the date of the event
- Approval from the Hunter authorized representative (Chair of the department, Provost, etc.)

6. **Vendor** – Payment to a vendor for goods and materials must be supported by proper documents. All expenses are exempt from New York State Sales Tax and or Hotel Room Occupancy Taxes.

○ **Supporting documents:**

- Only **one invoice** is allowed per check request (invoice numbers are matched one-to one with the check request number)
- **Itemized** receipt or invoice should be submitted (not the summary)
- Any items/services bought through the Internet must be supported by an invoice (e-invoice or e-mail indicating the invoice number, items bought, total amount, payment details) and packing slips
- Event brochure showing the date of the event and Hunter affiliation (Hunter College department, etc.) if the service is event related

7. **Independent Contractor** – For one-time payments for services that are greater than \$5,000 **OR** when services are engaged for more than one event, requests must be supported by a completed Independent Contractor Agreement (ICA). The contractor must be authorized to work in the US. Independent Contractor Agreement

- **Supporting Documents**
  - Signed independent contractor agreement (ICA)
  - Invoice for services. Supervisor or departmental approver must sign invoice to indicate services were rendered
  - Copy of the Social Security Card or signed W-9 Form
  - No payment can be issued to any Hunter employee for services rendered during their regular work schedules.
  - Amount of the contract is calculated based on the terms of the contract and not on the terms of payments. One ICA should be issued per fiscal year for those consultants who are working or will be paid on a monthly basis
  - Event brochure showing the date of the event and Hunter affiliation (Hunter College department, etc.) if the service is event related
  
- 8. **Services Rendered** – A single, one-time payment made to an individual or company performing a service (i.e. bartender) for less than \$5,000 must be accompanied by a services rendered form. Payments to an institution providing seminars or training must be supported by completed applications forms and brochure indicating the date and cost of the seminar/training or conference.
  - **Supporting documents:**
    - Copy of Social Security Card or signed IRS Form W9 (If the payment is recurring, a Social Security number or IRS Form W9 form only needs to be provided with the initial request)
    - Signed Services Rendered form
    - No payment can be issued to any Hunter employee for services rendered during their regular work schedules.
    - Invoice for services. Supervisor or departmental approver must sign invoice to indicate services were rendered
    - Event brochure showing the date of the event and Hunter affiliation (Hunter College department, etc.) if the service is event related
    - Note or evidence why the purchase was necessary or approval from the Hunter authorized representative (Chair of the Department, Provost, etc.)

### **Other**

If you have questions regarding web invoicing, please contact Shaun Ahmad at the Hunter College Foundation/Institutional Advancement Office at [sah0011@hunter.cuny.edu](mailto:sah0011@hunter.cuny.edu) or 212-396-6826