

From: Elisabeth Williams
Sent: Monday, March 08, 2010 1:00 PM
To: Adam Culbreath; Aida Henriquez-Brown; Angela Cheng; Bill Vandenberg; Christina Voight; Cristina Parnetti; Cristóbal Josh Alex; Elisabeth Williams; Erlin Ibreck; Fei Chin; Georgia Kirtland; Gladys Lopez; Holeri Faruolo; Hyon Seo Kwon; Jaime Herrera; Jeronimo Saldana; Jill Sowards; Katie Barnett; Laleh Ispahani; Leonard Noisette; Lori McGlinchey; Lorraine Ramirez; Luisa Taveras; Luna Yasui; Michael McCutcheon; Nancy Chang; Nashay Jones; Orelida Hicks; Patricia Jerido; Raquiba LaBrie; Rashid Shabazz; Rochelle Rosenbaum; Shawn Dove; Shruti Garg; Solomon Greene; Sophia Conroy; Terrance Pitts; Thomas Hilbink; Timothy Dorsey; Victoria Choong; William Johnston
Cc: Ann Beeson; Nancy Youman; Chris Gremski
Subject: F&A Transition of Payments and Expenses Reports
Importance: High
Follow Up Flag: Follow up
Flag Status: Blue
Attachments: FA_Travel Payment Request Guide.doc; AmEx Expense Checklist.DOC; Concur_Delegate AC.doc; Do's and Don'ts_OSI Travel Policy.doc

Dear USP Staff,

The Finance and Administration (F&A) Department is glad to announce the first stage of its long awaited transition. Starting in March, the Administrative Coordinators will take over the processing of American Express reports for US Programs Directors/Managers and Program Officers. PA will be responsible for processing their travel expenses.

The documents attached to this email address the guidelines and procedures that apply to all Open Society Institute employees, and most of all, introduces streamlined processes that are tailored to USP's needs. Please use these documents as a "resource" to understand the rules regarding payments and travel expenses, as well as a guide to ensure that all expenditures are allowable and properly documented in your request for reimbursement. The links in the "Travel & Payment Request Guide" will be live in the next couple of days and easily accessible in Karl.

To start the process, each Fund and Campaign has been assigned to an AC who will contact you in the next couple of days. F&A's goal is to fully take over the processing of Payments and Travel expenses and is asking for your patience while we are in the process of hiring one more AC. Transition of responsibilities from the PA to the AC, for some Funds/Campaigns, will take place after we are fully staffed. In the meantime, we will work closely with each Fund/Campaign to ensure a smooth transition. Please review the attached documents to ensure that we receive the required paperwork to process your requests in a timely manner.

We look forward to working with you and making this process as seamless as possible. Please do not hesitate to contact us if you have any questions or concerns.

Sincerely,

Elisabeth Williams
Finance & Administration Manager for US Programs