

Guidelines for the use of operating funds – for PhD Research Fellow and Postdoctoral Fellow

Approved by the pro-rector for research and the chief financial officer 16.4.2020 (first time approved 6.3.20). Revised 16.8.2023. Revised 18.10.2023.

1.0 Scope

These guidelines concern all the PhD research fellow and postdoctoral fellow (who have received their own operating funds) – both internally and externally, including those who are already employed, and future employments. The guidelines cover the disposal of assets and they are not only for guidance, but they are also *binding*.

1.1 Grant and purpose

As an employee at HVL you will be granted operating funds to cover necessary operating costs to complete the doctoral education/postdoctoral project – in the agreed employment period. The operating funds are normally 150 000 kr for the period of employment, however externally financed fellows can have other amounts. Our own funding for a postdoctoral fellow is normally 37 500 kr per full year. Our own funding for this may vary, as there might not always be enough funds.

The granted operating funds can be used as desired over the employment. At the beginning of the period of employment you will together with your supervisor create a budget for how the funds will be used. The supervisor will then inform the personnel manager that the fellow may receive a project number and access to the operating funds. The personnel manager will in turn forward this information to the economics department.

1.2 Normal usage areas

The fundamental purpose of the operating funds is to cover necessary expenses for the fellow to complete the doctoral education/postdoctoral project (as described in 1.1). Common costs may include:

- Conference and course participation
- Living and travelling costs that are necessary for the doctoral education/postdoctoral project (for example: courses, field work, accommodation at other institutions). There is a prerequisite that the fellow has applied to other funding sources for abroad accommodation. For more details see 1.5.

- The operating funds can cover conference costs, seminars, field work and courses with durations up to 2 weeks. Accommodation over 2 weeks can be defined as “fellowship travel” and the lowest tax-free rate for compensation must be used (with no additional compensation over the rate).
- Literature
- Laboratory supplies
- Licenses
- Procurement of services (such as copy editing)
- Equipment required for completing the doctoral education/postdoctoral project
- IT-equipment beyond HVL’s standard IT-package, which are necessary for completing the doctoral education/postdoctoral project. There are some limitations for fellows that are funded by The Research Council.
- Software that HVL does not have.
- Travelling costs for disputing

1.3 Examples of costs that can not be covered by the operating funds.

Some examples:

- Doctoral dinner and associated costs after the public defense of the doctoral thesis. This is a private arrangement.
- HVL covers the publication costs of the thesis associated with the public defense. This applies to the candidates who are participating in HVLs PhD programs. The publication costs can be covered even if the candidate graduates at another institution, if the degree-conferring institution does not cover it.
- Transferring operating funds to cover own salary expenses to extend the fellowship.
- Procurements for private use (see the first paragraph of 1.1).
- Visas, deposits, moving expenses and similar.

1.4 Prerequisites for procurement

As a PhD research fellow/postdoctoral fellow you are employed by HVL, therefore you must abide by HVLs and national rules for procurement – such as procurement of travels, literature etc. See our intranet website “Vestibysten” for more information. It is possible to choose other accommodation options besides hotels, however the cost has to be lower than HVLs hotel agreements.

All procured equipment is property of HVL and must be registered and returned to HVL by the end of the period of employment.

You will receive a standard IT-package at the beginning of the employment. This is in addition to the operating funds. Any other necessary IT-equipment must be purchased through HVLs IT-department and has to be covered by the operating funds.

Procurement of services must be done through publicly registered companies, so that the payment is documented by an official invoice.

1.5 Research stay abroad (and long-term domestic accommodation)

The budget and application for accommodation abroad (or long-term domestic accommodation) as a part of the program must be approved by the personnel manager. The application must include a description signed by the supervisor and has to be evaluated in accordance with the total operating funds. The PhD program may have other procedures as well. The candidate must have examined and/or applied to other available sources for funding. The operating funds can be used to cover the living- and travelling expenses, given that there are sufficient funds. See 1.2 for more information. You must establish your own travelling insurance.

1.6 The end of the employment period

After the employment period has ended the operating funds can be used for necessary costs to finish the thesis. The operating funds will become unavailable after 6 months of ended employment.

The fellow is responsible for terminating any licenses acquired during the employment and return equipment to HVL.

The fellow is responsible for not exceeding the budget for the operating funds, and it is not possible to ask for reimbursements after the funds have been used. The project that was made for the funds in the beginning will be locked. Excess use of funds will be at fellow's own cost, and the fellow will be held responsible for the amount exceeding the amount granted. If already spent, a demand for repayment will be made, unless an agreement has been made with the Faculty/center responsible for the fellow.

1.7 Practical information

As a PhD research fellow/postdoctoral fellow you need to have the following information:

- The cost center for your position (XXXX)
- Your own project number/work package (XXXXXXXX-XX)
- The procurers-code/orderer-code for the person who is responsible for processing the invoice for the fellow's procurements (XXXXXX)

For orders and procurements where HVL receives the invoice through UBW Agresso.

Travels and reimbursements for costs you have done in the DFØ-Portal.

Invoices to HVL – detailed invoice information for suppliers

Our online invoice address is the same as our organisation number: **0192:917641404**. This address supports the PEPPOL BIS standard and must be used.

The address complies with the Electronic Trading Format (ETF) standard.

If the supplier is not able to send the invoice electronically, then it can be sent by email as a PDF attachment to: faktura@hvl.no.

A robot then processes the invoices within our ordering/invoice system (UWB Agresso). So that your invoices and reminders can be handled without issue or delay, they must satisfy the following requirements. We ask that the person who is ordering and our suppliers to take responsibility for this.

- Invoices for orders **made through the electronic ordering system** will contain an order number, for example: 300100729. The order number can be found in the "Order Number" field (the ETF-field: Invoice/OrderReference/ID).
- Invoices for orders **not made through the electronic ordering system** will contain:
 - A 6-digit orderer-code, for example: 304150. The orderer-code will be provided in the "Buyer's Reference/Your Reference" field (ETF field: Invoice/BuyerReference)
The sales-person at the university will provide you with an orderer-code when he/she places the order for your goods/services. If the salesperson does not provided this, please request it.
 - Name of the orderer can be found in the "Buyer's contact person" field (ETF-field: Invoice/ AccountingCustomerParty/Party/Contact/Name).
If applicable, the project number/work order will be provided in the "Project number" field (ETF-field: Invoice/ProjectReference/ID)

The invoice will be addressed to the Western Norway University of Applied Science. This means that the invoice shall not be address to an employee, nor shall it be sent the employee's own email address.

Unless otherwise specified, please allow the Western Norway University of Applied Science a 30-day payment period.

Travels and reimbursement – DFØ-Portal

You have to apply for reimbursement through the DFØ-Portal for travel expenses and related costs you have prepaid. In the DFØ-form you have to change the cost allocation to your work package number (in k-element 4), and you need to change to your cost center as well. The fellow will receive the accounting report when requested from the economics department (from the person who created the project number/work package number/cost center).