

Student Reimbursement/Purchasing Processes

Research/Academic Program Related Travel:

Limited funds are available for travel related to your research and/or academic program. Use the following process to apply for funding:

(Location of all the forms: <https://earth.stanford.edu/ere/current-student-resources>)

1) *Requesting travel fund:*

Complete the **Request for Travel Funds** form AND the **Student Certification** form and submit to Yolanda or Thuy **before making travel arrangements**. Include the following information on the form:

- **Your advisor's signature**
- An estimated travel expense budget. (See "Guidelines for reimbursable expenses" below.)
- A copy of the correspondence confirming acceptance of your presentation or a copy of the preliminary program listing your participation.

2) *Making travel reservations:*

A Department travel credit card is available for airline reservations, hotel reservations (prepaid), and conference registration, if needed. A copy of the reservation confirmation must be submitted to your Research Program Administrator (Eiko or Joleen) **at the time the reservation is made**. Appropriate backup documentation (see below) is still required when you return from your trip. This card may also be used to guarantee your hotel room. In this case, you will need to pay for the actual hotel charges and submit the receipt for reimbursement when you return.

**Guidelines for reimbursable travel expenses:*

The University will reimburse **reasonable** and **appropriate** travel expenses.

- **Airfare** – Coach class, lowest fare available, **NO travel insurance**.
- **Conference Registration**
- **Food** – Actual meal expenses (NO per diem). **Maximum US\$50/day. NO alcohol.**
- **Lodging** – Shared rooms are required whenever possible. Lodging and parking only.
- **Rental Car** – Only if other transportation is not available. **Do NOT accept rental insurance** if travelling within the US. The University has insurance and will not reimburse you for additional coverage. If travelling outside the US, then coverage is recommended.
- **Transportation** – Taxi/bus/shuttle to/from airport, hotel, conference site.

3) *Tips for prompt reimbursement:*

- Submit your **receipts**, along with the **Travel Expense Form** and the **conference program page** listing your participation to Eiko or Joleen. **EVERY EXPENSE MUST HAVE A RECEIPT.**
- Receipts must show the method of payment (e.g., credit card type, last 4 digits).
- Submit your receipts promptly upon your return. **Reimbursements for expenses over 60 days old are considered taxable and will be reported to the IRS**
- If receipts are in a foreign language, provide a general translation (e.g., dinner, taxi, hotel).
- Organize your receipts into the categories listed above, so that they are easily identifiable.
- Include airline ticket stubs and/or an itinerary that details each segment of your trip.

Purchasing Lab Supplies and Equipment:

Orders under \$5,000: There are two methods to purchase items under \$5,000. Following are the processes for each method:

- 1) **Purchasing Card (p-card):** Eiko, Joleen, Thuy or Yolanda has a Department credit card (p-card) for your use. In order to use the card,
 - a. Check out the card before EACH purchase.
 - b. Once the purchase is made, return the p-card with a receipt
 - c. If a receipt is not available at the time of purchase, give a detailed description of the item(s) ordered. A receipt **MUST** be submitted as soon as it is available.

- 2) **Purchase Order :** If a vendor will not accept the Department credit card, use the following process to get a purchase order number:

Orders under \$5,000: Orders under \$5,000 and can only be ordered through Stanford's Procurement Department, using the following process:

- a. Get a written quote from the vendor for the item(s).
- b. A possibility to be ordered through Smartmart (Stanford procurement system)

Orders over \$5,000: Orders over \$5,000 must be ordered through Stanford's Procurement Department, using the following process:

- a. Get a written quote from the vendor for the item(s).
- b. Obtain two competitive quotes from other companies.
- c. Write a justification for choosing the preferred vendor (cheapest price, only vendor who could provide the product with the required specifications, etc.)