

# Stanford Expense Report Checklist

Contact the Financial Support Center with any questions 650.723.2772 [finhelp@stanford.edu](mailto:finhelp@stanford.edu) Or see the Admin Guide Travel Section

## General Information

Traveler Name \_\_\_\_\_ Trip/Event Name \_\_\_\_\_

Payee \_\_\_\_\_  
(if different than traveler)

## Payment Information

Payment Type  Travel Card  Out-of-Pocket  
(check both if applicable)

PTA Information  Single  Multiple

Any personal expenses?

Notes \_\_\_\_\_

## Business Purpose

Who \_\_\_\_\_  
Give the name(s) of the person(s) and their organization and/or department involved in the activity

What \_\_\_\_\_  
Explain the activity/circumstance that resulted in the expenditure

Where \_\_\_\_\_  
Location(s) of the activity

When \_\_\_\_\_  
Indicate the date or inclusive dates the activity took place

Why \_\_\_\_\_  
Describe the benefit of the activity to the University or sponsored research objectives

## Airfare

- Was there any personal travel on this trip?  
(if yes, screenshot showing lowest fare for business portion only, is required)
- Was booking made using Orbitz for Business?  
(if only business travel AND Orbitz for Business used - no lowest fare proof required)
- Do you have proof of lowest airfare?  
(screen shot of Orbitz for Business or other on-line travel tool)
- Do you have complete booking receipt?  
(showing ticket class, price, travel dates, & itinerary, etc.)
- Are food and ancillary airline fees identified?  
(e.g. baggage fees, in-flight Internet or telephone, etc.)

Notes \_\_\_\_\_

## Conference

- Do you have receipt for conference registration?
- Did you pay for additional attendees? \_\_\_\_\_
- Do you have a copy of the conference agenda?
- Any student/post doc expenses?   Student certification form?

Indicate the number of meals provided B \_\_\_\_\_ L \_\_\_\_\_ D \_\_\_\_\_

Notes \_\_\_\_\_

## Lodging

Reimbursement Method  Per Diem  Actuals

- Do you have itemized receipts for all lodging expenses?
- Are all personal/non-reimbursable expenses identified?

Notes \_\_\_\_\_

## Car Rental

- Do you have an itemized receipt for the rental agreement?
- Was additional rental insurance charged?  
(additional rental car insurance is ONLY reimbursed in Hawaii and outside the U.S.)
- Was the rental agreement extended to include personal use?  
If yes, indicate the number of days extended \_\_\_\_\_

Note: Stanford reimburses the cost of renting compact or standard size cars when reasonable for University business

Notes \_\_\_\_\_

## Meals

Reimbursement Method  Per Diem  Actuals

- Do you have itemized receipts for all meals over \$75?  
All meals with alcohol require itemized receipts regardless of amount
- Does every receipt identify alcohol or say "No Alcohol"?
- Have you indicated meals purchased for others on receipts?
- Did anyone else buy you a meal?

Notes \_\_\_\_\_

## Other Transportation Expenses

Include: taxi, limo, bus, train, parking fees, rental car fuel

- Do you have an itemized receipt for all expenses over \$75?
- Type \_\_\_\_\_ Amount \$ \_\_\_\_\_
- Type \_\_\_\_\_ Amount \$ \_\_\_\_\_
- Mileage: Total business miles driven in your personal vehicle

Total miles \_\_\_\_\_ From \_\_\_\_\_ To \_\_\_\_\_

Notes \_\_\_\_\_