

Stanford Expense Report Checklist

This checklist is intended to facilitate a quick post-trip conversation and backup documentation hand-off between traveler and expense report preparer. Contact the Financial Support Center with questions 650.723.2772 finhelp@stanford.edu

General Information

Traveler Name _____

Trip/Event Name _____

Payee _____
(if different than traveler)

Business Purpose - #1 cause for returned transactions

Who _____
(Person(s) and department(s) involved)

What _____
(The activity/circumstance that caused the expenditure)

Where _____
(Location(s) of the event)

When _____
(What are the business dates)

Why _____
(Describe the benefit to sponsored research objectives or the University)

Student/Post Doc Expense

Y N Any student/post doc expenses Y N Student certification form

Conference

Y N Agenda B _____ L _____ D _____ Meals provided
Please write the number of all meals provided

Airfare

Y N Any personal travel Y N Orbitz for Business used

Meals

Y N Pay for anyone else _____

Y N Itemized receipts or "No Alcohol" on all _____

Car Rental / Lodging

Y N Itemized folio / receipts Y N All ground / taxi receipts

Y N Any personal expenses _____

Notes _____
