



Tums (tips) for Reimbursement Requests



Because Stanford is auditing about 95% of all travel reimbursement requests, the processing time is often 10 days or more. Following are tips to help you avoid extra heartburn that may result from auditors asking questions about your expenses, and thereby adding to the wait time for your check.

1. Turn everything in well **before the 60-day deadline**, or your reimbursement check will be taxed as if it were income. You have 60 days from your last day of travel to turn in your receipts. (Really you have less time than that because I have other requests waiting in the queue)
2. Provide **everything in electronic format**. In the online system, everything, including backup like receipts, must be uploaded. Any hard copies that you give me will have to be scanned by me, and that will slow things down.

Scanning options (of which I am aware):

- a. Use the HP OfficeJet Pro 6835 printer. You need the driver on your computer first. Add your email to the scan directory (touch screen on the printer—fat fingers beware)
 - b. Use your smart phone camera. There are apps you can download to help you save photos as PDFs (e.g., TinyScanner). Mike knows a good one (I forget the name).
3. **Meeting program**. If your travel is associated with any kind of meeting, conference, workshop, or other event, you must provide a copy of the agenda or program or schedule.
 4. **Business Purpose clearly explained** and backed up with proof.
 - a. If you presented a talk or poster, chaired a session, please
 - i. Give the **title** of the talk, poster, or session
 - ii. **Circle** your name on the program, or from the list of posters or the abstract book, provide the cover page plus the page that lists your name and abstract (circled).
 - b. If instead of presenting, you attended mainly to network with researchers or "get the word out" about a certain project, **name the project** that benefited from your attendance.
 5. **Personal detours clearly defined**. If your travel included extra days beyond the conference or extra stops due to personal activities, make it clear that
 - a. these personal detours did not cost Stanford any extra money or
 - b. you are not asking Stanford to pay for the extra cost.
 - c. How to show this: **Before you book** your tickets, (1) run a query on your favorite travel search engine for an itinerary where you only traveled to attend the conference and then flew back. (2) take a screen capture of the possible flights and save as a PDF file. (3) circle the most economical (and reasonable) fares (4) submit it with your receipts for the auditors to compare.
 6. **Watch your meals**. Whether you are requesting reimbursement for meals by per diem or by original receipts, Stanford will only pay for meals that the conference did not provide.
 - a. If anything on the program looks like it could be a meal that you ate, the auditors will assume that you did. (Example: If you bought an Egg McMuffin for breakfast because you did not like the breakfast provided by the conference, that expense comes out of your pocket.)
 - b. However if a meal was listed on the program, but you could not eat it (1) because it was restricted to certain guests, or (2) due to your own dietary restrictions, you should state so in your business purpose.
 7. **Never ask for these**. The following expenses will not be reimbursed:
 - a. **Airfare from foreign airlines**. Because most of Dr. Cherry's grants are from government entities, you should always book flights on a U.S. carrier, even if it means paying more money. The Fly America Act requires this.
 - b. **Seat upgrades**. Any fee for extra legroom, priority seating, etc.
 - c. **Alcohol**.. If you have meal receipts with alcohol, circle the booze. If the receipt is not itemized, write on the receipt whether you had alcohol and, if so, how much the alcohol cost.
 - d. **Wi-Fi on the airplane**. (Wi-Fi in hotel is okay.)
 - e. **Travel insurance**.
 - f. **Rental car insurance** (unless travel is in Alaska or Hawaii).

Please email your request to mariamo@stanford.edu and watch for a reply to confirm that I received it. If no response in 2 days, give me a nudge so it does not fall through the cracks.