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:

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 with your request:

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

Making travel reservations: A Department travel card is available for airline reservations 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. However, you will have 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. NO movies or laundry.
- 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.

Tips for prompt reimbursement:

- Submit your receipts, along with the “Travel Expense Form,” the conference program page listing your participation to Yolanda or Thuy. EVERY EXPENSE MUST HAVE A RECEIPT.
- Receipts must show the method of payment (e.g., last 4 digits of credit card) or you will not be reimbursed for the expense.
- Be sure to 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, please provide a general translation (e.g., dinner, taxi, hotel, etc.).
- 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.

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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 and Yolanda have Department credit cards (p-cards) 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 and the name of the vendor. 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:
   a. Get a written quote from the vendor for the item(s).
   b. Give the quote to Joleen or Eiko and they will request a purchase order number.
   c. Some items may be available through SmartMart (Stanford’s preferred vendor system). They will be ordered through SmartMart, if the price is lower.

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.)
   d. Give the above documentation to Eiko or Joleen and they will submit the requisition.

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