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 (hard copies are available in the mail room – GESB 021). Include the following with your request:

- A copy of your presentation abstract.
- 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 (Yolanda or Thuy) 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). **NO alcohol. Reasonable costs.**
- **Lodging** – Shared rooms are required whenever possible. Lodging and parking only. **NO movie 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 a copy of your “Request for Travel Funds,” the “Travel Expense Form,” the conference program page listing your participation, and a completed and signed “Student Travel Certification Form” (copies available in room 021) 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.
**Purchasing Lab Supplies and Equipment:**

**Orders under $2,500:** There are two methods to purchase items under $2,500. Following are the processes for each method:

1) **Purchasing Card (p-card):** Karen has a Department credit card (p-card) for your use. In order to use the card,
   
a. Check out the card before EACH purchase. Karen has a check-out log to track purchases.
   
b. Once the purchase is made, return the p-card to Karen with a receipt and completed “PCard Receipt Voucher” form. The receipt voucher form MUST include a business purpose for the purchase.
   
c. If a receipt is not available at the time of purchase, include a detailed description of the item(s) ordered on the receipt voucher form. A receipt MUST be submitted as soon as it is available.

2) **Purchase Order (RPO):** If a vendor will not accept the Department credit card, use the following process to get a purchase order number:
   
a. Fill out a “Requisition Form” and bring it to Yolanda or Thuy. They will determine the proper account (PTA) and verify availability of funds.
   
b. Give the Requisition form to Karen, who will generate a Purchase Order number.
   
c. Karen will give you the PO number, so that you can place the order.

**Orders over $2,500:** Orders over $2,500 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. Fill out a “Requisition Form” and bring it, along with the quotes and justification, to Yolanda or Thuy. They will determine the proper account (PTA) and verify availability of funds.
   
   e. Give the documents to Karen, who will submit a Purchase Order request.