YSOA Student Reimbursement Guidelines and Form

Please review the reimbursement and receipt guidelines before submitting your reimbursement request.

- For **course-related travel**, trip-specific Workday instructions will be provided one week prior to travel. If you are a student employee at Yale, you must initiate your reimbursement through Workday by creating an expense report.

- If you are not a student employee and for all other reimbursements, complete the reimbursement form on page 3 and submit along with receipts to archbusiness@yale.edu

- Reimbursements **under $300** will be processed through petty cash. Once your request is processed, you will receive a Petty Cash Voucher. Bring this voucher, your Yale ID, and all receipts to the Yale Treasury Office on the first floor of 2 Whitney Ave. **Please note**: paper receipts must be original copies, while electronic receipts may be printed.

- Reimbursements **over $300** will be processed electronically or by check.

- **International students** must complete their Sprintax Calculus profile before submitting a reimbursement request to the Business Office.

Materials and Other Expense Reimbursements:

- Faculty approval is required.
- Only purchases made through the University Amazon Account are covered. Purchases made through personal Amazon accounts are not reimbursable. To request access, contact askfinance@yale.edu. You will receive an invitation email with a link to access the account.
- eBay and IKEA purchases are restricted. Contact the YSOA Business Office at archbusiness@yale.edu **before** purchasing.
- Gift cards/certificates are prohibited.
- For Papercut charges, you will need the corresponding YalePay statement.

Course-Related Travel Expenses:

- The following expenses are **NOT reimbursable**: frequent flyer and similar reward programs; car rental insurance for domestic rentals; automobile repairs and gas for personal vehicles (mileage may be reimbursed); roadside assistance; parking tickets and other violations; lost baggage fees; travel insurance; loss or theft of personal funds or property while traveling; individual meals; and passport issuance and/or renewal.
- Visa fees and related travel expenses are reimbursable.
- If you have any questions about what is reimbursable, reach out to Cheryl Nadzam at cheryl.nadzam@yale.edu **before** traveling.

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Receipt Requirements:

- **See sample receipts here.**
- Keep all **original** receipts. Receipts should be legible and need to include the **merchant's name, date of purchase, description of what was purchased, the dollar amount and proof of payment.**
    - Proof of payment includes indication of a credit card charge and last 4 digits of the credit card number, copy of a cancelled check (front and back) or a copy of a bank statement showing your name in the header and the charge (the rest of the statement can be blacked out). Please note that a bank statement alone is not sufficient as a receipt since it only shows proof of payment.
- Expenses should be paid with your credit card or debit card. We can only reimburse the payee, so if someone else's name is on the bank statement, receipt, etc. that is the person we must reimburse. **If you split an expense with another student, please provide an e-mail from that student providing the details.**
- If the receipt is in a **foreign language** and totals $1,000 or more, a fully translated receipt is required (from Google Translate or similar). If the receipt totals less than $1,000 a description of what was purchased in English **on the** receipt is sufficient.
- For air/rail travel expenses, if applicable, include the itinerary listing traveler name, trip details (including class) and pricing.
- For lodging expenses, if applicable, include the itemized hotel receipt (i.e. folio); for rentals such as Airbnb, the receipt should include the location, description of accommodations, rate and number of guests.
- For car rental expenses, if applicable, include the final receipt indicating daily rate, mileage, vehicle type, insurance status, plus any gas receipts.
- For ground transportation (Uber, Lyft, Taxi, etc), please specify to and from information.
- If you are unsure if your receipt is valid or if you are missing a receipt, please contact the YSOA Business Office at archbusiness@yale.edu.

Please review the reimbursement and receipt guidelines above before submitting your reimbursement request.

YSOA Student Reimbursement Form

Name		**Email**	
NetID		**Phone #**	
UPI #		**Citizenship**	☐ **US** ☐ **International**

Local Mailing Address

Course #		**Travel Dates (if applicable)**	

Explanation of Business Purpose *(who, what, where, why; e.g. Advanced Studio Trip to Paris, photocopying, studio supplies, etc.)*
Certification
I hereby certify that the expenses were incurred for official business of Yale University and that no portion of the claim was provided free of charge, previously reimbursed from any other source, or will be paid from any other source in the future. Should any portion of the reimbursement be found to be non-compliant with Yale University policy, I will reimburse the University within 30 days of being notified.

Student Signature		**Date**	

Faculty/Supervisor or Administrator Signature: *I hereby authorize this expense to be assigned to my course or other allotted budget.*			
Print Name			
Signature		**Date**	
(If faculty/supervisor is not available for signature; obtain and submit e-mail approval from faculty/supervisor)			

****All receipts should be scanned as SEPARATE pdf files and named i.e. 1-Uber 8-8-22 $20.00****

Expense Accounting (Itemized expenses)

Receipt #	Date	Description	Amount
1 EXAMPLE	8/8/2022	Uber from airport to hotel	$20
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

If you have additional expenses please submit them on an Excel spreadsheet.