

# Helpful tips for a hassle free reimbursement

1. The 1st document you will need is the [Non-Profiled Payee Travel and Business Expense Worksheet](#). When completing the worksheet, **DO NOT COMBINE EVENTS, MEETINGS, ETC.** For example, meetings held on different dates should be submitted on different worksheets. If you are submitting reimbursement for a monthly recurring expense, this is ok to combine. Please keep in mind that expenses older than 120 days from the date of expense may be subject to tax when reimbursed to you. **DO NOT COMBINE EXPENSES.** You must list expense separately. For example, if you have multiple Uber trips, each trip is a separate expense. **DO NOT INCLUDE NON-REIMBURSEABLE ITEMS ON THE FORM.** These are items such as travel insurance and personal or recreational expenses not related to the travel or business purpose. For more text on Business and Travel Expense Policy, please the links [here](#) & [here](#).
2. The 2nd document should be the reason for which you are seeking reimbursement. Below are examples of such and what documentation is required.
  - a. **Conferences** – this should be 1-3 pages. Provide the conference flyer detailing the dates, location and agenda if necessary. If you are presenting, provide **ONLY** the page where you are listed as such.
  - b. **Meetings/Events/Gatherings** – provide the email communication that discloses the details (date, time, location, etc.) to individuals invited. The names and UNI's for those who attend must be provided if less than 10. If more than 10, disclose the total number of attendees.
  - c. **Gift Cards** – provide documentation that shows Gift Cards will be awarded. Also, provide the full name of the recipients. If gift cards are given to students, staff or faculty, provide the UNI as well.
3. The following documents must be **ALL** receipts and/or proof of payment for expenses. You must include an **ITEMIZED** receipt especially for meals. If paying with a credit card, a valid proof of payment must show the last 4 digits of the card used and the name of the card holder. If your receipt does not show this, you must attach a statement showing the expense. **DO NOT PROVIDE A SCREEN SHOT OF THE TRANSACTION FROM A MOBILE DEVICE. THIS DOES NOT DISPLAY THE CARD HOLDER NAME.** If you are using a statement, it should be attached to every related expense with that individual expense highlighted.
4. When submitting the form and documents, each should be submitted in PDF as its own attachment. For example, if you have 7 expenses, you should submit 9 documents. 1st is the **Non-Profiled Payee Travel and Business Expense Worksheet**. 2nd is the documentation detailing why you are seeking reimbursement and the remaining 7 are the receipts/proof of payment.
5. If you have any questions or concerns about what you plan to submit please reach out to Harold Owusu-Ansah - [ha2392@columbia.edu](mailto:ha2392@columbia.edu).

