Conference and Training Fund

Reimbursement Guide

If you have been approved for a reimbursement from the Council for Campus Engagement, use this guide to provide all necessary documents and fulfill all procedures that will help the Center for Student Involvement complete our UW Tacoma financial policies to return your reimbursement.

Without proper documentation and without these steps fulfilled, a reimbursement cannot be filed. Following all necessary steps means that your reimbursement may take 3-4+ weeks, as the process include several UW Tacoma and UW Seattle approvals.

Documents that are **required** when filing for a reimbursement:

- Itemized Receipts/Final Bills
    - These documents must include
        - All Itemized expenses
        - Proof of payment
        - Reflect only the dates of your conference or travel reflected on your proposal
    - These documents do not include
        - Confirmations (for flights or hotels)
        - Reservation emails or notices (for flights or hotels)
        - Flight Plans or Itineraries (unless proof of payment is reflected)
- Approval Letter
    - Provide your copy of your Conference and Training Fund Approval letter to cleary2@uw.edu
- **Employee Pre-Reimbursement Checklist-** Complete only if you are a current UWT Student Employee (hourly or stipend), please complete the Employee Pre-Reimbursement Checklist (Access Here). If you are not currently employed by UW Tacoma, jump to the Non-Employee Travel Reimbursement Form
    - This document should **only** reflect the quantities that have been spent, unless your reimbursement costs exceed your approved budget. If your expenses exceed what was approved, please only put the numbers that you were approved for on this document, as you will only be reimbursed for the approved amount.
    - Students should complete the following boxes on the form before filing it with Conor Leary (cleary2@uw.edu)
        - Name
        - Date Submitted

- Home (City/State)
- Select “UW Student”
- Universal Payee Requirement: Review the UW Privacy Notice and select “Yes”
- Trip Information
  - Conference Name
  - Location
  - Travel Start Date & Time
  - Travel End Date & Time
  - Please check Signed Travel Approved
    - Your Pre-Travel Authorization Form will be attached when reimbursement is submitted
  - Personal Time
    - Select “No”
- Professional Fees
  - Please fill in if you are filing for reimbursement for Registration Charges (CTF does not pay for membership)
- Airfare
  - Please fill in if you are filing for reimbursement for Flight Charges
  - Check “Itinerary/Receipts Attached” -- this is a required document
- Baggage Fees
  - DO NOT USE; CTF does not pay for baggage fees
- Ground Travel
  - DO NOT USE: CTF does not pay for ground travel
- Privately Owned Vehicle Mileage
  - Use only if CTF approved mileage reimbursement
- Lodging Fees
  - Please fill in if you are filing for reimbursement for Flight Charges
  - Check “Prepaid Hotel Receipt or Checkout folio attached” -- this is a required document
- Meal Fees
  - DO NOT USE: CTF does not pay for food expenses
- Other Miscellaneous

            - DO NOT USE: CTF can only reimburse for Registration, Airfare, and/hotel
        - Do not fill out items beneath "Reimbursement not to exceed funding limit without Department approval"

- **Non-Employee Travel Reimbursement Form**: If you are not a currently employed Student Employee, please Completed Non-employee Travel Form (Access here)
    - This document should **only** reflect the quantities that have been spent, unless your reimbursement costs exceed your approved budget. If your expenses exceed what was approved, please only put the numbers that you were approved for on this document, as you will only be reimbursed for the approved amount.
    - Students should complete the following boxes on the form before filing it with Conor Leary (cleary2@uw.edu)
        - Name
        - Date Submitted
        - Home (City/State)
        - Select "UW Student"
        - Universal Payee Requirement: Review the UW Privacy Notice and select "Yes"
        - EU GDPR Requirement
        - "Are you a US Citizen or a Green Card Holder"
            - If No, continue to answer those questions
        - Trip Information
            - Conference Name
            - Location
            - Travel Start Date & Time
            - Travel End Date & Time
            - Personal Time
                - Select "No"
        - Professional Fees
            - Please fill in if you are filing for reimbursement for Registration Charges (CTF does not pay for membership)
        - Airfare
            - Please fill in if you are filing for reimbursement for Flight Charges

        - Check “Itinerary/Receipts Attached” -- this is a required document
    - Baggage Fees
        - DO NOT USE; CTF does not pay for baggage fees
    - Ground Travel
        - DO NOT USE: CTF does not pay for ground travel
    - Privately Owned Vehicle Mileage
        - Use only if CTF approved mileage reimbursement
    - Lodging Fees
        - Please fill in if you are filing for reimbursement for Flight Charges
        - Check “Prepaid Hotel Receipt or Checkout folio attached” -- this is a required document
    - Meal Fees
        - DO NOT USE: CTF does not pay for food expenses
    - Other Miscellaneous
        - DO NOT USE: CTF can only reimburse for Registration, Airfare, and/hotel

- **Currency Converter** (Access here) *For International Travel Only
    - Provide report only if your reimbursement was in an international currency