



Reimbursement Instructions – Spring 2021

tl;dr

Set up direct deposit. We can't reimburse tax. Cost object is 2859935. Send to Terryn Brunelle (terryn@mit.edu) with descriptions of your order.

Direct Deposit

Before you submit a request for reimbursement, you should set up Direct Deposit if you haven't already -- it is the fastest way to get reimbursed and takes away the risk of losing a check. Go to

<https://atlas.mit.edu> and select **My Reimbursements** → **Direct Deposit Preferences**.

Purchasing Items

→ You will not be reimbursed for tax. In order to avoid paying for tax, print a tax-exempt form and show it to the retailer.

→ Receipts must show individual **items** and their prices, as well as **proof of payment**.

When in doubt, submit *invoices* instead of *order confirmations*.

→ If your receipt does not show proof of payment, you must submit a credit or debit card statement in addition to the receipt, to prove that you paid for the item(s).

→ Here is a good example of *part* of a receipt that shows proof of payment:

Payment information	
Payment Method: Visa Last digits: 5104	Item(s) Subtotal: \$12.89 Shipping & Handling: \$0.00 -----
Billing address Rachel Wang [address redacted for privacy]	Total before tax: \$12.89 Estimated tax to be collected: \$0.00 ----- Grand Total: \$12.89

→ It may be a good idea to keep a photocopy of receipts for your records.

- The payee listed on the receipts must be the one whose name is on the RFP (unless the payee is a related family member)

Submitting an RFP (Request For Payment)

1. Go to <https://atlas.mit.edu> and click on **My Reimbursements** → **Request a Reimbursement for Me**. It should take you to a page that looks like this:

Request a Reimbursement (RFP)

[Save & Continue](#)

You have choices in the payment method MIT uses to reimburse you for out-of-pocket and travel expenses. To view your current settings, and change them if you wish, please go to Atlas and select "Reimbursement Preferences".

Reimbursement details

Payee	Madeleine M. Haworth
Charge to	MIT
Name this RFP	Available for your use.

Line items

1.	* Date of Service	G/L Account	Cost Object	* Amount
	mm/dd/yyyy			\$
	* Explanation			
	Add Line			

Note to Central Office

2. Name the RFP "**ProjX** - [project name]".
3. Create separate line items for each of your receipts:
 - a. **Date of Service**: the date on the receipt
 - b. **G/L Account**: 420226 (or leave blank)
 - c. **Cost Object**: 2859935
 - d. **Amount**: the subtotal on the receipt (does not include tax - remember we do not reimburse for tax!)

- e. **Explanation:** details of purchase (where & what). Please include your name and project name (otherwise we can't verify that you have funding).
- f. **Note:** Please keep your RFP to be under 10 line items. If you need more line items than this, please create a new RFP for those items

The screenshot shows a web form titled "Line items". It contains a table with the following columns: "1.", "* Date of Service", "G/L Account", "Cost Object", and "* Amount". The first row of data shows the date "02/05/2017", an empty "G/L Account" field, the cost object "2859935", and an amount of "\$ 24.95". Below the table, there is a section labeled "* Explanation" with a text area containing the text "Arduino Uno R3 from Adafruit" and "Madeleine Haworth - Electric Scooter - ProjX". At the bottom of the form is a button labeled "Add Line".

1.	* Date of Service	G/L Account	Cost Object	* Amount
	02/05/2017		2859935	\$ 24.95

* Explanation

Arduino Uno R3 from Adafruit

Madeleine Haworth - Electric Scooter - ProjX

Add Line

4. Click **Save and Continue**. You should be brought to a screen that says **Attach Receipt**.
 - a. If you have a hardcopy receipt, take a picture/scan with your phone and upload it.
 - b. If you have a digital receipt, upload it.
 - c. Note: if you purchased materials from Amazon, you **must** attach the "Final Details for Order", **not** "Order Details". This is because the order needs to have shipped and your card needs to have been charged in order to be reimbursed.
5. Once you have attached all your receipts, click **Send To** and send the RFP to ProjX's financial officer, **Terryn Brunelle (terrryn)**.
6. You're not done! Once the RFP has been sent, you should see a page that says **RFP Confirmation**
7. Now you're done! Once approved, RFPs can take up to two weeks to process, and you will receive reimbursements. If you have any questions about your RFP, email Terryn (terrryn@mit.edu) or contact the Student Activities Office (Mary Mango, mmango@mit.edu).