

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.

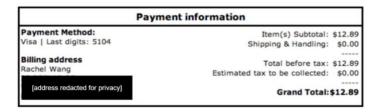
Direct Deposit

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:



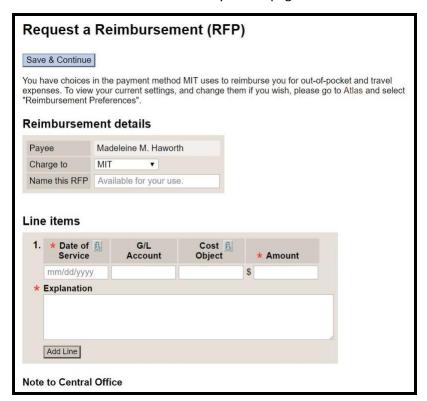
→ It may be a good idea to keep a photocopy of receipts for your records.

→ 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:



- 2. Name the RFP "ProjX [project name]".
- 3. Create separate line items for each of your receipts:

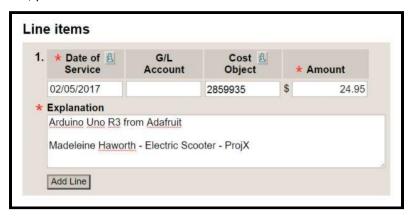
a. Date of Service: the date on the receipt

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



- 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 (terryn)**.
- 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 (terryn@mit.edu) or contact the Student Activities Office (Mary Mango, mmango@mit.edu).