



CAPSTONE TEAM REIMBURSEMENT INSTRUCTIONS AND FORM

Each Capstone team can be reimbursed up to \$500 for Capstone-related expenses.

Student Expense Reimbursement Forms should be submitted for \$300 or less and will be reimbursed in cash at the Office of the Bursar. If your total reimbursement request exceeds \$300, it should be split into 2 forms that are each under \$300. If this is not possible, the reimbursement can be processed as a check, but it can take up to 6-8 weeks for NYU Accounts Payable to issue the check.

Fall reimbursement request submission will begin Monday, November 20, 2017 and end Friday, December 8, 2017. Spring reimbursement request submission will begin Monday, April 16, 2018 and end Friday, May 11, 2018.

Please read these important rules before making any purchases:

- Students are not allowed to use a consultant or request reimbursement for their services
(ex: graphic designer, copy editor, translator).
- Never let anyone outside of your team pay for any expenses - only NYU students can be reimbursed.
- Receipts must show proof of payment. For credit card purchases, the last 4 digits of the credit card used is sufficient. An invoice that doesn't indicate that it has been paid is not acceptable.
- NYU can only reimburse a student for a charge made on their own credit card (if multiple team members buy items on their credit cards, each student will have to complete their own reimbursement request). You may find it easiest for one team member to make all the purchases, if possible.
- Gift cards for clients or survey participants can only be reimbursed if they are \$25 or less.
- Reimbursement for certain expenses will require the surrendering of the purchased item to the Capstone Program at the project's conclusion (ex: small electronic devices).
- All reimbursement requests are subject to the discretion of the Capstone Co-Directors.

Reimbursable expenses include:

- Printing, binding, and preparation of Capstone documents (including materials for Capstone Expo)
- Calling cards / Skype purchased to make long-distance telephone calls on behalf of the client
- Software programs purchased for data analysis
- Non-alcoholic refreshments for project-related meetings involving external participants, ex: focus groups or client meetings (food/beverage expenditures for team project meetings are not included)
- Local travel expenses incurred for project-related work (Please note: plane or train fare to visit clients outside of metro NYC are requested separately using the Reimbursement Form for Pre-Approved Capstone Supplemental Travel)

The reimbursement process is as follows:

1. Each team member who purchases items using their own credit card must complete their own **Student Expense Reimbursement Form** on the next page. Please complete all of the **highlighted** fields by typing into the form then printing it out. The 'signature of payee' field requires an actual signature. You must also complete the **Itemized Expenses Sheet** on the last page.
2. Compile original receipts for all expenses that will be reimbursed. Tape any loose paper receipts to a plain sheet of 8 ½ x 11 paper. **The Office of the Bursar will only accept original paper receipts, not copies.** For online credit card purchases, please include a printout of the confirmation email. Please use paperclips, not staples to keep everything together.

Receipts must be easily readable and must indicate proof of payment (ex: receipt that shows last 4 digits of credit card used). Invoices that don't indicate payment or "balance due" statements will not be accepted. **If your receipt does not show proof of payment, you must include a copy of your credit card statement that shows the charge.**

Please note: If you are not a US Citizen or Permanent Resident, you will need to submit a **copy of your passport** along with your original receipts.

3. Submit your Student Expense Reimbursement Form, Itemized Expenses Sheet, and all original receipts with proof of payment to Catherine Falzone at 295 Lafayette Street, 3rd Floor, New York, NY 10012. These documents can be delivered in person to the Puck Building or sent by mail if necessary.
4. Once your reimbursement form has been received, approved, and signed by a Capstone Director, you will be notified by email. **You can then pick up your approved reimbursement form and all original receipts in your Puck Building student mailbox.** You will need to bring these documents to the Office of the Bursar at 383 Lafayette Street, 1st Floor to receive your reimbursement in cash.

Itemized Expenses Sheet

| Explanation of submitted expense(s) | Cash/Charge | Amount (US\$) |
|--|-------------|---------------------|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |
| 6. | | |
| 7. | | |
| 8. | | |
| 9. | | |
| 10. | | |
| | | Total amount |
| Puck Building student mailbox #: _____ | | \$ _____ |



STUDENT EXPENSE REIMBURSEMENT FORM

(LAST REVISED SEPTEMBER 2011)

Form EXP2000S

For Accounts Payable Use Only

This form is to be used by NYU students only to request reimbursement for university business expenses.

NYU will not process requests for expenses that are deemed nonpermissible/nonreimbursable by the University.

For guidance, refer to the Business Expenses Policy and Expense Reimbursement Policy of the University (www.nyu.edu/financial.services/cdv/policies).

If reimbursement is for travel, attach Form EXP2000T (reimbursement request for each trip must be submitted on a separate Form EXP2000T).

If reimbursement is for meals during business meetings or events, attach Form EXP2000M. Otherwise, complete Box 11.

CASH REIMBURSEMENT

☐ Mark box if total expenses are \$300.00 or less and you want reimbursement in cash. For cash reimbursement, take the form to the Office of the Bursar. For location and office hours, please refer to the Office of the Bursar Website (www.nyu.edu/bursar/location.hours).

PAYEE INFORMATION

| | | | |
|--|---|---|--|
| 1. PAYEE'S FULL NAME (FIRST NAME, MIDDLE INITIAL, LAST NAME) | | For Accounts Payable Use Only | |
| 2. HOME ADDRESS | | VENDOR NUMBER: | |
| 3. ALTERNATE MAILING ADDRESS (IF APPLICABLE) | | 5. UNIVERSITY ID NUMBER: N _ _ _ _ _ | |
| 4. DEPARTMENT TO BE CHARGED | 6. CONTACT PERSON (IF OTHER THAN PAYEE) AND TEL. NUMBER | | |

EXPENSE/ACCOUNT DETAILS

| 7. EXPENSE TYPE | 8. AMOUNT | 9. CHARTFIELD | | | | | TAX CODE |
|-----------------|-----------|---------------|------|----------|---------|---------|----------|
| | | ACCOUNT | FUND | ORG/DEPT | PROGRAM | PROJECT | |
| | \$ | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| TOTAL EXPENSES: | \$ | | | | | | |

10. TOTAL AMOUNT OF REIMBURSEMENT (IN WORDS)

11. DESCRIPTION AND BUSINESS PURPOSE OF EXPENSE/S

12. SIGNATURES/APPROVALS: I, the Payee, certify that the charges reported here are correct and that I am not claiming reimbursement from other sources for the same. I understand that the University will deduct all federal, state, and local taxes and report any payments made to me as required by law.

| | | | |
|---|------------------------|-----------------------------|------|
| SIGNATURE OF PAYEE | EMAIL ADDRESS OF PAYEE | TEL. NUMBER | DATE |
| NAME OF APPROVER Catherine Falzone | SIGNATURE OF APPROVER | TEL. NUMBER 212-992-8701 | DATE |
| SIGNATURE OF PAYEE TO PICK UP PETTY CASH (To be signed in the presence of the teller at time of pick-up.) | | | |