# TBER QUICK TIPS

## Determining the type of expense

- Before filling out the basic info (name, address, etc.) determine if your expense is related to Travel or Business. Note: All expenses made during travel will be considered a Travel Expense, e.g. purchasing supplies for an event during your travel.
- Both types of expenses will require the date of your first expenses. Travel Expenses also require the travel end date. This will be the date of your last expense, e.g. taxi or any other means of transportation home. For Business Expenses, the "**Period End Date**" will be the last date of the related expense.

## Your Personal Information

- On the form, be sure to use the address where your check should be mailed. If your address has changed since your last reimbursement, please notate the change on the TBER form by checking the appropriate box, which will alert the TBER processor to contact Vendor Management with your new info.
- Always sign the "**Payee's Signature**" Section of the form.

## Overall Business Purpose

- **Do not** leave this section blank.  In detail, describe the purpose of the expense and what the purpose aims to achieve.
- For travel, conferences or meetings, please provide a flyer, forms, or any type of announcement for the event. Specify the dates of the event in the section.

## Itemized Expense Descriptions & Documentation/Receipts

- List the items for which you're seeking reimbursement by number in this section along with the purpose/reason for that item. If you need to use more lines, the worksheet has an additional page on the tab located at the bottom of the worksheet that will tally the amounts onto the first page. Expenses for alcohol should be listed in the **Segregated Expenses** column. For meals/meetings of less than 10 individuals, please add the names or UNIs of all participants. If more than 10, document the total number of attendees.
- Save and submit all **ITEMIZED** receipts. E.g., a receipt from a restaurant with the food and/or drink items purchased should be submitted, **NOT** the receipt with only the final total. If you're missing a receipt, itemized or not, go to www.finance.columbia.edu and type **"Missing Receipts Worksheet"** in the search bar located in the upper right hand corner. This worksheet will allow you to list items for the missing receipt to submit as documentation.
- A receipt should show whether you paid by cash or debit/credit card.  If you paid with a card, the last 4 digits of your account should be visible. If you cannot locate this on the documentation, then this is not an official receipt or confirmation of payment.  However, a bank/credit card statement can be submitted as proof of payment.
- Please number your receipts and make sure those numbers correspond to the order that you list them on the TBER form. E.g., if expense #1 on your TBER is an airfare purchase, you should write "#1" on your airfare receipt.
- For the documentation, **DO NOT** submit anything with staples. Receipts that are generated from a register must be taped on the left hand side to a blank 8.5" x 11" sheet of paper. To save paper, tape and label multiple receipts onto one page.