# Guide for Submitting Reimbursements Student Edition

Reimbursements are now done through the Concur system. Please follow the steps below.

Step 1: After meals, meetings, or purchases – You must keep all receipts (including itemize receipts for meals) and obtain the credit card statement reflecting the charge.

Step 2: Next, all receipts and credit card statements should be scanned or saved as a PDF document. Receipts or credit card statements (if the receipt is not available) will be accepted via email.

Step 3: After you complete Step 2, now you are ready to send an email to LaToya Testamark ([LT2936@columbia.edu](mailto:LT2936@columbia.edu)); cc: AGES ([ages.econ@gmail.com](mailto:ages.econ@gmail.com)) and cc: Jacqueline Jenkins ([jj2776@columbia.edu](mailto:jj2776@columbia.edu))

Step 4: In the subject line of your email, please state what type of reimbursement it is and this is what you should include in the body of the email:

**Who:** Who is the reimbursement for?

**What:** What kind of reimbursement is this? (For Example: Lunch with John Smith or Data Purchase)

**When:** When did this occur? (For example: Lunch took place at Friedman’s on September 30, 2021

at 12PM or Purchased data – listing the transaction date)

**Why:** Why did it occur? (For Example: Had lunch with John Smith to discuss research project or purchased data to help conduct research)

**Amount:** Please indicate how much was spent.

## \*\*Remember: If you are having lunch or a meeting with someone, please list the full name of the attendees and the individual MUST be a Columbia Affiliate and indicate what department their apart of.

Step 5: Don’t forget to attach your receipt or credit card statement, showing the charge. We

recommend you black out all other charges and leave the reimbursement charge visible.

Step 6: The reimbursement will take approximately 2-3 weeks for it to be processed.

\*\*We recommend you set-up direct deposit to receive pay out quicker than check.

Set up direct deposit: <https://www.sfs.columbia.edu/direct-deposit>

# How to Become a Vendor Student Edition

To be able to get reimbursed, you must have a supplier ID/Concur ID in the Columbia Vendor System.

Here are the steps to becoming a vendor in the system (\*\*If you are not a vendor in the system):

Step 1: You email Latoya Testamark (LT2936@columbia.edu), your w9 form/w8-ben (if you are international, you must send a scanned copy of your passport and Visa), which will reflect your legal full name and address.

Step 2: LaToya will fill out the information and you will receive an email from vendor management with a questionnaire that you must fill out immediately or your profile will get rejected.

Step 3: Once everything is completed, it will take approximately 2 weeks for a profile to be officially approved.

## Direct Deposit

**Direct Deposit & Wire Set-Up**

TO SIGN UP FOR DIRECT DEPOSIT/ACH OR UPDATE EXISTING BANK ACCOUNT INFO (VENDOR ONLY):

1. Go to: https://forms.finance.columbia.edu/vendor-request/
2. Enter the vendor ID or vendor name and click Submit
3. Select the vendor and click Edit
4. Select Direct Deposit/ACH for the type of modification
5. Follow the prompts to submit the request
6. You will be sent an email with login and password to provide the banking info
7. Someone from Columbia Vendor Management will call or email you to validate the banking information

## Wire

TO SIGN UP FOR WIRE OR UPDATE EXISTING WIRE BANK ACCOUNT INFO (VENDOR ONLY):

1. Go to: https://forms.finance.columbia.edu/vendor-request/
2. Enter the vendor ID or vendor name and click Submit
3. Select the vendor and click Edit
4. Select Wire for the type of modification
5. Follow the prompts to submit the request
6. You will be sent an email with login and password to provide the banking info
7. You will be prompted to print out, sign, and upload the wire transfer template