

STUDENT PAYMENT FOR STANFORD-RELATED EXPENSES

A note to administrators: Payments to help a grad student pay education-related expenses (other than travel expenses) can be considered to be student support. As such, these kinds of payments are processed as stipends in GFS (these are processed through the doctoral and masters program officers in academic services). This includes money to buy books or other materials that the student will use and keep. When money is being awarded **in advance** to pay education-related expenses, the funds can be provided as a stipend (students should not purchase items prior to receiving approval for the stipend and confirmation that it has been entered by the program officer). As student support, these payments are tax-reportable income. The student may be able to deduct their education-related expenses on their taxes (and should save their receipts for this purpose). If a student is being reimbursed for materials purchased for the department (where the materials will belong to Stanford, and not to the student), the expense should be treated as university business and processed through the Travel and Reimbursement office, not by means of a stipend payment in GFS.

This policy is to help guide students and their advisors/program directors with regard to helping students pay for services, equipment, supplies, food and travel related to Stanford business. Stanford has very specific rules (as do some funding sources) regarding reimbursement and purchasing of services and supplies. In some cases, if a student pays out of their own personal funds for something, even with faculty approval, they may not be able to be reimbursed if the expense is not allowed on the funding source, or if the appropriate approval via Stanford wasn't sought in advance. So, following some simple steps will help ensure that the expense can be covered, and that students are not out of pocket.

1. Get Approval & Confirm Funding. Before doing anything, students should check in with their advisors/faculty/program directors to see if there are funds to cover the desired expenses and then check in with the appropriate faculty administrative associate about planning the best way to make the purchase.

2. DO NOT use personal funds to cover Stanford-related business. Students should NOT pay out of their own pockets for any expenses related to Stanford business that faculty or their program directors have approved without exploring with the faculty administrative associate all possible avenues for making the purchase. Administrators have purchasing credit cards, abilities to cut checks, travel cards, etc. They also have access to discounted sites and services for Stanford affiliates. So there are very few instances (no matter how small the amount) that should require payment out of pocket. In rare cases where this may be necessary, make NO purchases or commitments without first consulting with a faculty administrative associate. They will guide you through the process so we can ensure reimbursement.

3. Keep in touch with the faculty administrative associate. Administrators are well-versed in the policies and regulations regarding buying and paying at Stanford. They will help guide you along the way and ensure that Stanford's policies are being followed.

4. DO NOT Pay People. Paying people at Stanford is very tricky and requires a number of tax and personal identifier forms. In some cases we may not be able to reimburse students for paying people for services or human subjects

A few notes on specific purchases:

FOOD: No matter how small the amount, students should not purchase food (for class, cohort meetings, events, etc.) using personal funds. There are strict policies around purchasing food that require some advanced planning (some funding sources do not allow food purchases and there are restrictions on the amounts that can be spent on food). Faculty administrative associates can assist in making these purchases, when approved by faculty/program directors.

TRAVEL: If you have not taken advantage of the School's Travel Fellowship, this is the simplest way to receive funding for travel to conferences or research sites. In cases where travel expenses are approved by faculty/program directors and the travel fellowship will not be used, students should go to their faculty administrative associate to inquire about next steps. There are maximum amounts that can be spent on travel, restrictions on the types of airlines that can be selected, and some restrictions on over-night stays. To avoid running into a situation where students will be out of pocket and unable to get reimbursed, the faculty administrative associate is the best first point of contact after approval of funds is received. There are also instances where the travel can be all pre-paid on the administrator's travel card (discounted travel may also be available through Stanford's travel agent connections) and where advances for purchases of travel-related tickets can be obtained.

SERVICES & SUBJECT PAYMENTS: *(includes translation, tech-support/programming, etc.)* Paying other people or institutions at Stanford requires some paperwork and in some cases pre-approval from the University's finance offices. Checks and advances can be arranged through the faculty/program director's administrative associate.

EQUIPMENT & SUPPLIES: In almost every case, faculty administrative associates have access to Stanford discounted sites that can get equipment and supplies here within one or two business days. They can pay for this and directly charge faculty/program accounts, so there's no need to be out of pocket for even the smallest amount.

STUDENT SUPPORT FORM

To be used by Students when using Stanford funds to make a purchase

Name: _____ Date: _____

Email: _____ Tel: _____

Description of Item/Service/Travel:

Stanford Business Purpose (use the "who, what, when, where & why" format):

Additional Notes:

Faculty/Program PTA (Account) to be charged: _____

Faculty/Director Approval Signature: _____

Please return completed form to the faculty/program director's administrative associate before beginning any purchases/travel plans.