

Reimbursement FAQs for short-term visitors

Online reimbursement submission

- **How can I request a reimbursement?** Go to simons.berkeley.edu/tools and review the information provided for short-term visitors. Read the instructions for the form for your reimbursement (travel & accommodation OR travel only). Click on the link to the form and enter the information required.
- **What is a Vendor Request Form?** The Vendor Request Form is used to set you up as a vendor in the University's system. You must be entered as a vendor in order to be eligible for reimbursement.
- **What is the Certificate of Academic Activity?** Foreign travelers visiting UC Berkeley on a B-visa or a waiver classification are considered tourists and must complete the Certificate of Academic Activity. To receive travel expense reimbursement, these travelers must meet the following criteria:
 - Purpose of the visit must be for "usual academic activity"
 - Visit cannot exceed nine days
 - Payment must be offered by UC Berkeley
 - Visa holders cannot have accepted reimbursement for travel expenses from more than five academic institutions within the previous six-month period
- **What is the W8-BEN and why do I need to fill it out?** The W8-BEN is the Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding. The University will use this information to determine the appropriate Federal tax withholding applicable to any payment(s) you receive. Reimbursements are typically not taxable (though you will need to verify your tax liability according to your individual circumstances).

Receipts

- **What is a receipt?** Receipts need to indicate:
 - whom you paid (name of the person or company you paid)
 - the amount you paid and type of currency
 - when you paid (transaction date)
 - what you bought (itemized description of goods or services purchased),
 - and how you paid (cash, check, or credit card)
- **When are receipts required?** Receipts are required for expenses above \$75 and all

accommodation and rental car expenses, regardless of the cost.

- **How can I upload my receipts?** Please scan and upload the receipts as a PDF file. You can either upload multiple files or just one file with multiple pages.
- **Do I have to provide receipts for every expense?** Receipts are required for expenses above \$75 and all accommodation and rental car expenses when you are visiting the Simons Institute.
- **I lost my receipt. Can I still request reimbursement for this expense?** Please contact the Events Coordinator at simonsevents@berkeley.edu. In some cases, other documentation such as a credit card statement may meet the University's requirements.

Reimbursement amounts

- **I don't remember if I was offered funding or not. How can I find out?** Contact the Events Coordinator at simonsevents@berkeley.edu.
- **I spent more than the allowed maximum amount. Can I still request reimbursement?** Yes, you can still request reimbursement, but you will only receive the maximum amount offered.
- **I spent less than the allowed maximum amount. Can I still claim the maximum amount?** No, you can only claim the amount you actually spent.
- **Where can I convert my foreign currency amounts?** The University's reimbursement office prefers the oanda.com currency converter: <http://www.oanda.com/currency/converter/>. Be sure to convert the amount using the conversion rate of the date of purchase.

Flight reimbursement

- **Which receipts do I need to show for my flight reimbursement?** You need to provide the itinerary showing the dates, flight times and departure and arrival airports. The itinerary or your receipt must show that the balance has been paid. Please also see **What is a receipt?**
- **Can I request reimbursement for my round-trip ticket now, even though I have not completed the trip yet?** No. We can only process your reimbursement when the trip is completed.
- **Can I receive reimbursement for checked-bag fees?** Yes, you are allowed to check bags and request reimbursement for the baggage fees.
- **Can I fly first or business class?** No. Only economy class is reimbursable. First-class or

business-class tickets are not reimbursable.

- **Can I request reimbursement for WiFi on the plane?** No.
- **Can I request reimbursement for an extra legroom upgrade?** No.
- **Can I leave from an airport other than the airport closest to my home institution?** Yes. However, you must provide a justification for why you did not leave from your home airport. You are also required to include a mock itinerary for your flight as if you had taken it from your home airport.
- **Can I include a detour in my itinerary?** If you do not fly directly to Berkeley, but include a detour or longer layover into your trip, you must provide a justification for the detour. Please also add a mock itinerary for your flight as if you had taken it from your home airport.
- **My ticket is cheaper than I thought. Can my partner use the remaining flight reimbursement amount for his or her ticket?** No.
- **Can the Simons Institute book and pay my flight for me?** This is an option in extenuating circumstances. Please contact the Events Coordinator.