

Expenses: Non-Employee and Student Reimbursement Form

Employee as Self, Non-Employee, Student, Program Manager, Cost Center Manager

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The reimbursement form can be used by non-employees, University of Miami students, and student organizations to submit expense reimbursement requests for expenses incurred on behalf of the University (e.g. airfare, lodging, per diem, student club activities) according to the [Electronic Travel & Business Reimbursement Policy](#).

The form **cannot** be used to pay taxable amounts to any person, reimburse an employee's expenses, or pay students amounts that should be processed via the Office of Student Financial Assistance and Employment (OSFAE) ([see Payments to Students Policy](#)).

This document will identify what you need [before you begin](#), how to [access the reimbursement form](#), [complete all necessary fields](#) and [follow up on your request](#).

Before You Begin

1. Ensure that you have the following documents, legible, in a single electronic file (e.g. PDF document) that is ready to attach during the business process (2MB max.):
 - Relevant receipt(s) for expenses
 - Relevant documents (e.g. itinerary, reservation information, conference agenda, Google Maps printout, etc.)
2. Ensure that you have the Driver Worktag (e.g. Program, Grant, Gift, or Project) number associated with the traveler's expenses

Note (1): Refer to the [FRS/FDM Conversion Tool](#) if you do not know which value to use. This is a secure tool; if you are not a University of Miami employee, please contact the department for assistance.

Complete and Submit the Non-Employee and Student Reimbursement Form

Note (2): This form is currently not compatible with Internet Explorer.

3. Browse to: www.miami.edu/expenseform

4. **Payee Name***: Type payee's name
5. **Address Line 1 (U.S. domestic address only)***: Type payee's street address. Use **Address Line 2 (U.S. domestic address only)** if needed

Note (3): Only a U.S. domestic address can be entered on this form. If the payee has an international address, include the phrase "Request address change" in the *Business Purpose* field (step 10) and include documentation of the international address in the attachments (step 22). The preparer must enter their office address as a placeholder to be able to submit the form. The Program Manager or Cost Center Manager is able to modify the payee's address in Workday (see the [For Approvers in Workday](#) section on page 2).

6. **City***: Type payee's city
7. **State***: Type payee's state
8. **Zip Code***: Type payee's zip code
9. **Driver Worktag***: Type applicable Driver Worktag number from which the funds will be drawn:
 - Program (e.g. PG023501); **OR**
 - Grant (e.g. GR001005); **OR**
 - Gift (e.g. EN000025, BG004634); **OR**
 - Project (e.g. PR001002)
10. **Business Purpose***: Type business purpose for which the payee is being reimbursed
11. **Payee Category***: Select the option that describes the payee being reimbursed:
 - **Student Expense Report** – For student activity or travel that is **not** considered to be financial aid
 - **Non-Worker Domestic Expense Report** – For non-employees traveling to or within the U.S.
 - **Non-Worker Foreign Expense Report** – For non-employees traveling outside of the U.S.

Note (4): *Non-Worker Foreign Expense Report* should only be selected for travel outside of the U.S. Reimbursements to visitors coming to the U.S. for business is considered domestic travel.

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Preparer's Information

Note (5): The *Preparer* is the person completing and submitting this form.

12. *Preparer Name**: Type preparer's name

13. *Preparer Phone Number**: Type preparer's phone number

14. *Preparer Email Address**: Type preparer's email address

Note (6): A submission confirmation will be sent to the email address provided.

UM Contact's Information

Note (7): The *UM Contact* is the point person at the University, and **cannot** also be the *Payee*.

15. (If applicable) *If the UM Contact's information is the same as the Preparer's, check this box*

16. If the UM Contact is not also the Preparer, enter their information in these fields:

- *UM Contact Name**
- *UM Contact Phone Number**
- *UM Contact Email Address**

Expense Items

17. Click to select an *Expense Item*

18. (Required) *Description* column: Type a description of the expense

Note (8): If *Expense Item* is *Other Expenses*, the *Description* **must** state the type of expense.

19. *Amount*: Type dollar amount

20. Repeat steps 17-19 as applicable. If additional rows are needed, click **Add Row**

Note (9): There is a maximum of ten rows that can be submitted per form.

21. *Total* will calculate based on previous fields

22. Add attachment(s) related to these expenses (e.g. itinerary, receipts, reservation information, conference agenda, etc.):

- Click **Attach Receipts and Backup Documentation***
- Click **Upload Files** to choose attachment and repeat as needed

23. Click **Submit Reimbursement Form**

Follow Up


For Preparers

After submitting the form, a confirmation screen will appear. An email will also be sent to the email address you provided. Take note of the reference number (e.g. ERF-00012345) provided in these confirmations.

To check the status, make changes, or if you have any questions, contact your UM Contact. Include your reference number and contact information in any correspondence.

For Approvers in Workday

Once the form is available in Workday, it will route to the Program Manager (if applicable) or Cost Center Manager. Follow these steps to edit the Payee's address and identify the Preparer and UM Contact:

- 1.** Click 
- 2.** On the *Actions* tab, select the *Ad Hoc Payment* item you want to review
- 3.** Locate the *Payee Address* information and edit as needed (e.g. enter a foreign address)
- 4.** Scroll down to locate the *Preparer's/UM Contact's Information* in the *Comments* field

Important Information

Policy

- [Electronic Travel & Business Reimbursement Policy](#)
- [Payments to Students](#)