

Marcus Institute Staff Instructions for Submitting Electronic Reimbursement Requests

10.1.19

In order to centralize the process, eliminate paper documentation and minimize turn-around time on reimbursements, staff must now submit reimbursement requests electronically via email to: ResearchAdmin@hsl.harvard.edu.

General rules:

- 1) Each reimbursement must be in single PDF format (one single request per PDF)
- 2) Only one PDF document per email can be accepted
- 3) In order for Accounts Payable to be submitted with Friday's weekly batch, the staff member must submit the final, signed versions via email to researchadmin@hsl.harvard.edu by the end of the day Wednesday

The steps for submitting an Electronic Reimbursement Request are as follows:

- 1) The staff member will prepare the relevant reimbursement form and compile all backup documentation as required per the Marcus Institute Reimbursement Policy prior to obtaining any signatures and send via email to ResearchAdmin@hsl.harvard.edu with "**REVIEW**" included in the subject line
- 2) Research Administration will review the reimbursement request for accuracy and respond to the staff member's request for review by either:
 - a. Requesting any changes/further backup documentation
 - b. Informing the staff member that the reimbursement request and all backup is sufficient and provide a **reference number**
- 3) If Research Administration informs the staff member that the reimbursement request needs further documentation or changes, the staff member must collect documentation and make any necessary changes and resubmit for review until a reference number is given.
- 4) When Research Administration informs the staff member that the reimbursement request and all backup documentation is sufficient, the staff member must then write the reference number at the top of the cover page and circulate for all required signatures in accordance with the IFAR Reimbursement Policy and the IFAR Purchasing Policy & Procedure. Signatures required include:
 - a. Person receiving reimbursement
 - b. Authorized account signatory (if not also the person receiving reimbursement)
 - c. Supervisor of person receiving reimbursement (if not the authorized signatory)
 - d. Grant Manager
 - e. For reimbursements over \$2,000 the Vice President of Research Administration
- 5) Once signatures have been obtained, the staff member may then attach the fully signed cover sheet to the completed backup, add the reference number to the top of the cover page, and submit the fully signed, completed reimbursement packet via email to ResearchAdmin@hsl.harvard.edu with "**SUBMISSION**" and the **reference number** in the subject line