Student Club Reimbursements

Information about student club reimbursement. You must submit a Yale SOM Jira Ticketing System.

Student Club Reimbursements

Club reimbursement is the proper avenue if any of these statements apply:

- After receiving approval from the budget officer, I purchased food or supplies for a club event and now I’d like to submit for reimbursement
- I need to reimburse a guest speaker for expenses incurred while speaking at a club event

Club Reimbursements

- Submit your reimbursement within 10 business days of incurring the expense or returning from the trip through the online reimbursement request form in the Yale SOM Jira Ticketing System.
- Yale will reimburse the person who can document they made the purchase. Original itemized receipt (to document the expense) and bank/credit card statement (to document you incurred the expense) are required. A receipt needs to reflect the vendor, the item(s) purchased, and that a payment was made. Review these electronic receipt documentation guidelines for more information.
- Be sure the club budget officer approves the purchase before you spend the money. The email must be attached when requesting reimbursement. Acceptable email approval:

  Hi (Student name),

  I, as the budget officer of (Insert Club Name), approve (Student’s Name) reimbursement request in the amount of ($$.$$) from the (Internal /External) (Club Name) account for the (Event Name and Description, Date Location).

- University policy does not permit the use of Yale funds for the purchase of gifts for Yale students, faculty, or staff. If you wish to make such a purchase, you must use personal funds, and will not be reimbursed.
- Submit one form per event (may include several expenses).

Please note:

- Additional documents may be required based on affiliation to Yale (e.g. W9/W-8BEN for supplier setup, tax documents, etc)
- Forms of payment:
  - Acceptable: Debit cards, Credit cards Cash or Check
  - Unacceptable: Money orders, PayPal, Peer to Peer payments, 3rd party payments or purchases made with Venmo, Cash App or Zelle.
- Proof of Payment:
  - Original detailed receipts: An acceptable receipt is one that is printed on official letterhead or company stationery and that includes line item details such as the date(s) and description of each expense, a zero balance, and showing the last 4 digits of a credit card. All others must be accompanied by additional supporting materials (e.g. a credit card statement showing proof that an expense was paid with a personal credit card).

Required Information/Documentation (Employee vs Supplier)

Student University Forms and School of Management Club Links
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