Required Information/Documentation (Employee vs Supplier)

**Yale Employee:** One who receives wages or salary from Yale for work performed: Teaching Assistant, Research Assistant, Student Hourly Employment or Staff Member.

**Required Steps:**
- Create a Yale SOM Jira Ticketing System: Complete the form, be sure to fill out all of the fields and attach all required documents. Any missing information will delay the reimbursement process.
- Confirm your banking information or mailing address is correct in the Student Information System (SIS) and Workday.

**Required Documents:**
- *U.S. Citizen and Foreign Individuals:*
  - Budget officer approval
  - Proof of purchase: Include itemized receipt and be sure the method of payment is visible including the last four digits of the credit card used or your credit card statement showing the charge. If cash was used make sure a zero balance is visible on the receipt.

**Yale Supplier:** An individual receiving payment who is not a Yale employee.

**Required Steps:**
- Create a Yale SOM Jira Ticketing System: Complete the form, be sure to fill out all of the fields and attach all required documents. Any missing information will delay the reimbursement process. *Guest speakers and prize winner reimbursements must be submitted by SOM student.*

**Required Documents:**
- Budget officer approval
- Reimbursement: Proof of purchase: Include itemized receipt and be sure the method of payment is visible including the last four digits of the credit card used or your credit card statement showing the charge. If cash was used make sure a zero balance is visible on the receipt.
- Prize or Award Payment: Must include recipients' legal name, details of the competition, and dollar amount. Acceptable award letter:
  
  **Dear (Legal Name),**
  
  Congratulations! You have been awarded a **(Name of Event)** for the **(Date of Event):**
  
  **Award Information:** (1st) Prize: **(Amount)**

- **U.S. citizens:**
  - Form W-9 - U.S. persons to provide the correct taxpayer's Identification number - *If this is not your first time submitting a request you can skip this step.*
  - Supplier Payment Setup ACH/EFT (Direct deposit) – *If this is not your first time submitting a request you can skip this step.*

- **Foreign Citizen:**
  - Form W-8BEN - Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals) - *If this is not your first time submitting a request you can skip this step.*
  - Supplier Payment Setup ACH/EFT (Direct deposit) – *If this is not your first time submitting a request you can skip this step.*
  - Foreign National Information System (FNIS) - Confirmation email from International Tax Office.
    - Register with the International Tax Department - All international students, scholars, faculty, and staff receiving any type of payment from University are required to complete the Foreign National Information System (FNIS). You must include the following information:
      - Your name as it appears in the Yale Payroll System;
      - Employee ID and/or University Person Identifier (UPI, as printed on your Yale ID card;
      - Your Yale email, if available

**Links:** Yale School of Management.
- Yale SOM Jira Ticketing System
- Business Operations Portal Homepage
- Academic Affairs & Student Life (AASL)
- Campus Groups
- Club Leader Refresher PowerPoint – coming soon
Related articles

- Requisition to Purchase Order
- Student Club Purchasing
- Enterprise Learning Credit (ELC)
- Supplier Set Up and Change Requests
- Grubhub - Yale Corporate Account