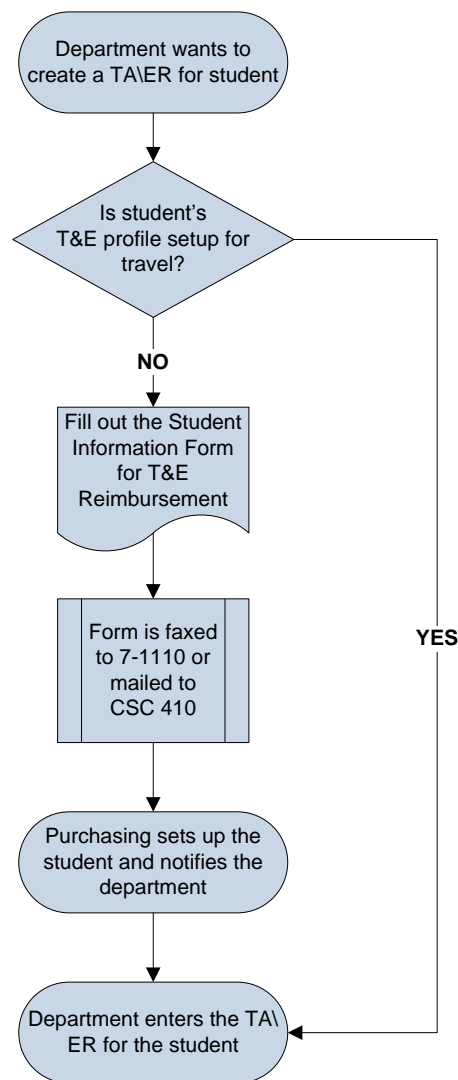


Office of the Controller

Student Information Form for Travel and Expense Reimbursement Instruction Sheet

Purpose: The purpose of this document is to guide the University Community how to fill out the Student Information Form for Travel and Expense Reimbursement



Step 1 (verifying if the student is setup for travel)

Before entering a TA or an Expense Report for a student, verify that he or she is setup for travel by using the query FIU_TE_SETUP_INFORMATION in the Reporting (“Query”) database.

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Enter the student's Panther ID (PID) at the prompt. If the students' "Setup For Travel?" is "Yes", then proceed to "Step 4 (entering the student's TA or Expense Report)" or else proceed to "Step 2 (filling out the form)" below.

Step 2 (filling out the form)

New: Indicates if it's the first time the student's information is being entered in PeopleSoft

Update: Select either or both of the following two options....

- **Chartfield/Supervisor** if the student is being paid via a different Activity Number or Project ID or the supervisor is different from his or her previous supervisor.

*Rtgcug'p'qvg'yj cv'yj g'hwf'kpi 'Cev'xk'Pwo dgt'qt'Rtqlgev'KF'ecp'cnuq'dg'ej cpi gf'fk'gewf''
qp'yj g'VC'qt'GT'cv'yj g'wo g'h'gpvt{'epf'yj cv'yj k'l'qto 'f'qgu'p'qv'j cxg'iq'dg'Hmgf'qww'ht'yj k'l'ku'
yj g'q'p'rf'ej cpi g'0Cnuq'p'qvg'yj cv'Uwr gt'xluqt'o'k'yj g'HKW'go r'iq'gg'c'w'j qt'h'kpi 'yj g't'cxgn'
cpf'ecp'q'p'rf'dg'ej cpi gf'w'kpi 'yj k'l'qto 0*

- **Bank Information** if the student's banking information for direct deposit has changed.

Contact Information

PID: Panther ID of the student. Each student registered at FIU is assigned one. Please contact the Office of the Registrar if the student does not know his or her PID number.

Last Name and First Name: Legal name of student.

Note: The address information will be used to send a reimbursement check in case the banking information is inaccurate or the Bank Account Information is left blank.

Default Chartfield Values *Tgs w'k'gf +

Please use the query FIU_GL_ACT_PROJ_LOOKUP in the Reporting database to obtain the chartfield information. Alternatively, you can also go to

- (i) *Set Up Financials/Supply Chain → Common definitions → Design ChartFields → define Values → SpeedTypes*
- (ii) On the SpeedTypes page, enter the Activity Number or Project ID in the *SpeedType Key* field
- (iii) Select "Universal" on the Type of SpeedType

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- (iv) Press “Enter”

Note: You **must** enter the PC Bus. Unit, Activity, and Department ID when using Contracts & Grants project IDs.

Bank Account Information

Account Type: Select Checking, Savings, or Other depending on the type of account that will be used as direct deposit for the student’s travel reimbursement.

Bank ID and Account Number: Found at the bottom of checks for checking account. The student should contact his or her banking institution to get the appropriate banking information (bank account number and routing number).

Notes:

- (i) Fax (at 7-1110) or send with the form a copy of a voided check to ensure that the banking information is accurate.
- (ii) If the Bank Account Information is left blank, the student’s reimbursement will be in the form of a check that will be mailed at the address provided in the Contact information section.
- (iii) A new form must be re-submitted if the bank account information changes after the initial setup.

Request for Proxy

Add the PID and name of the person(s) (the proxy) who is (are) going to enter the TA and expense reports on behalf of the student. Please use a sheet of paper for additional proxy information

Approval

Approved by: Must be approved by either an Expense Manager or Business Unit Approver.

Name and PID: Name and Panther ID of the person approving that the person should be setup for travel.

Signature and Date: Signature of the approver and date it was approved.

Step 3(submitting the form)

Print the form and fax it to Purchasing at 7-1110 or mail it to CSC 410.

Step 4 (entering the student’s TA or Expense Report)

Enter the student’s TA or Expense Report in PantherSoft Financials.