

## **REIMBURSEMENT PROCEDURES FOR GSO GRANTS**

Dear GSO Grant Recipient,

To claim your GSO Grants and Awards reimbursement, follow these four steps:

### **STEP 1: WH-1 (Statement of Citizenship and Federal Tax Status)**

Fill out the latest approved WH-1 form found on the GSO website, following all directions. Depending on your citizenship, you may be required to complete additional forms. You **MUST** fill out and turn in any form specified by the WH-1 to receive your reimbursement.

### **STEP 2: CHECKLIST & MATERIALS**

In your award letter notification, review the list of materials required to receive reimbursement. Then gather ALL necessary materials and complete the GSO Grant Reimbursement Checklist. Submission of insufficient documentation will delay the reimbursement process and/or may result in the forfeiture of your award.

### **STEP 3: SUBMITTING THE MATERIALS**

When you have completed all necessary forms and have gathered all pertinent materials, please turn in the completed reimbursement packet by scheduling a **MANDATORY** reimbursement meeting via the following link:

<http://www.doodle.com/uhmgso>

If you are off-island, please contact the GSO at [gsogrant@hawaii.edu](mailto:gsogrant@hawaii.edu) to make alternative arrangements.

### **STEP 4: WAITING**

After you have submitted your reimbursement packet we will prepare and forward your claim to the GSO faculty advisor, the fiscal officer, and the UH Disbursing Office. Please allow 12 weeks from the time you have submitted a complete reimbursement packet. All questions regarding reimbursements should be directed to the GSO Grants and Awards Manager at [gsogrant@hawaii.edu](mailto:gsogrant@hawaii.edu).

Please remember that the GSO is an entirely volunteer, graduate student-run organization. Although we will try to handle your reimbursement as expeditiously as possible, we, like you, have other responsibilities and priorities. If there is a problem with the materials that you have submitted, the GSO Advisor or the GSO Grants Manager will contact you to try to resolve the difficulty. If you believe that your reimbursement has been unduly delayed and feel anxious, please contact your program's GSO Assembly representative before contacting the GSO office.

Your patience and understanding is greatly appreciated.

Congratulations again,  
GSO Grants and Awards Office  
[gsogrant@hawaii.edu](mailto:gsogrant@hawaii.edu) (808) 956-8776

## REIMBURSEMENT DOCUMENT CHECKLIST

A description of each item on the checklist has been provided to assist you. If you need further assistance please see our website <http://gso.hawaii.edu> or email [gsogrant@hawaii.edu](mailto:gsogrant@hawaii.edu). When in doubt, err on the side of submitting more documents (rather than less).

### **1. Copy of Official GSO Grant Decision Letter**

The letter is from the Grants and Awards chair notifying you of your grant decision. It is printed on University of Hawai'i GSO letterhead.

### **2. Approved Itemized Budget Form**

An Approved Itemized Budget Form, which is submitted with your application packet, is a form used by the reviewers to determine grant awards. A copy of the official budget form, with notification of the items that were denied or approved is sent to you with your GSO Grant Decision Letter.

### **3. Reimbursement for Airfare**

If you have been awarded funding for airfare on your itemized budget approval form, please provide the following items:

#### **A. ORIGINAL Boarding Passes**

- Please tape or paste **ORIGINAL** boarding passes on 8 1/2 X 11 inch sheets of paper. Originals are needed so that the fiscal office may guarantee that the recipient has paid for the trip herself/himself and that the recipient has actually traveled. Not having original receipts/boarding passes often indicates to the Fiscal office that the traveler submitted these documents elsewhere for reimbursement or never made the trip. Thus, it is important that you try to obtain/keep original boarding passes for each leg of the journey. Please do not submit e-tickets printed from your computer.

#### **B. Proof of Payment by Traveler**

- Proof of Payment by traveler is documentation that you, the grant recipient, paid for the airfare.
- If you paid by credit card, we need your receipt and your credit/debit card statement showing airfare purchase and your name (only the last 4 digits of the credit card number need to appear). Make it clear that you are the owner of the credit card.
- If you paid by check, we need a copy of either a cancelled check, front and back, or a bank statement showing that the check has cleared.
- If you arranged the purchase through a travel agency, we need a statement showing name of purchaser (your name), cost of ticket, and indication that the ticket was paid in full. The receipts should show a zero balance due.

#### **C. Travel Itinerary**

- The itinerary includes such information as your name and when and from which airports you will be traveling (this should include flight numbers).

### **4. Reimbursement for Lodging**

If you have been awarded funding for lodging on your itemized budget approval form, please

provide the following items.

**A. ORIGINAL Hotel or Accommodations folio**

- This folio **MUST** include dates of stay, daily rates, itemized charges, and that the due balance is zero.

**B. Proof of Payment by Traveler**

- Please see 3B, to see how to provide documentation for proof of payment by traveler.

**5. Purpose of Travel/Research Summary**

Purpose of Travel or Research Summary **MUST** be documented in order to be reimbursed for airfare, lodging, research materials, or any other related expenses.

If the purpose of travel was to attend a conference or present a paper, please provide

1. **Conference Brochure** (Copy of cover and page with grantee's name)
2. **Proof of Attendance** (such as copy of name badge and listing on a roster)
3. If you have been approved funding for your conference fee, please provide **ORIGINAL conference fees receipts**

If the award was to conduct research (e.g. research materials, fieldwork), please provide

1. **Statement of completion from Advisor (including Advisor contact info)**
2. **Brief Summary of your research and outcomes**

**6. Other types of reimbursements**

Please make sure that you provide **ORIGINAL** receipts. Remember all receipts must also have proof of payment by traveler. Please tape or paste **ORIGINAL** receipts on 8 1/2 X 11 inch sheets of paper.

**7. WH-1 (Statement of Citizenship and Federal Tax Status):**

ALL applicants must complete a WH-1 form. Remember to sign all the tax forms in English. U.S. citizens and permanent resident aliens are required to fill out sections A and E of this form. All others are required to fill out sections A, B, C, D and E of this form. If you are a permanent resident alien, you are also required to submit a photocopy (front and back) of your Alien Registration Card.

All other **international students** are required to submit a photocopy of your **passport, visa, and I-94 (front and back)**. The I-94 is found stapled into the page of your passport. Please submit either a copy of both the front and the back of the I-94 Departure Record, or an electronic printout from the U.S. Customs and Border Protection website.

**J-1 visa holders** are required to submit a copy of their **DS-2019** (formerly called IAP-66). **F-1 visa holders** are required to submit a copy of their **I-20**. **B visa holders** are required to submit a copy of their **FMIS-45**.

NOTE ON SECTION D of WH-1: All international students are required to fill out and submit from W-8BEN, regardless of your home country having a tax treaty with the U.S. or not.

## GSO GRANT REIMBURSEMENT CHECKLIST

Please print or type:

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Last Name	First Name	Middle	Student ID
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**Current Mailing Address (in case of mail delivery):**

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Street	Apartment#	City/County	State	Zip
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(\_\_\_\_) \_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

**The following items are required. ALL award recipients must submit 1, 2, 3, and 6.**

- 1. Copy of Official GSO Grant Decision Letter
- 2. Itemized Budget Approval Form
- 3. WH-1 (Statement of Citizenship and Federal Tax Status) form for current year.
  - o For Are You Employed section, please **do not** check any box. **Do not** fill out this section.
- 4. Reimbursement for Airfare (If awarded funding for airfare, the following is needed.)
  - o ORIGINAL Boarding Passes (If missing, provide statement why)
  - o Proof of Payment by Traveler (Copy of credit card statement: if your name is not on the statement, please add a copy of your credit card, receipt from travel agency, etc.) \*\*\*\*
  - o Travel Itinerary (with total and last four digits of credit card used) and price.
- 5. Reimbursement for Lodging (If awarded funding for lodging, the following is needed)
  - o ORIGINAL Hotel or Accommodations folio which include dates of stay, daily rates, itemized charges and no balance due
  - o Proof of Payment by Traveler (Copy of credit card statement and receipt from travel agency with prices, etc.)\*\*\*\*
- 6. Purpose of Travel/Research Summary  
(If requesting for reimbursement for airfare, lodging, or any other travel related expenses, A-B is needed)
  - A. Conference Brochure (Copy of cover and page with grantee's name)
  - B. Proof of Attendance (such as copy of name badge and listing on a roster)
  - C. If you have been approved funding for your conference fee, please provide ORIGINAL conference fee receipt and proof of payment by attendee. \*\*\*\*
  - D. If you were awarded for a research project (not a conference), please attach a brief summary of funded project (1 page) and advisor confirmation of completion.
- 7. Other ORIGINAL receipts (conference fees, Research Materials, etc.)\*\*\*\*
- 8. Copy of the front and back of I-94 **or** electronic printout (If you are an international student)
- 9. Copy of the I-20 (If you have a F-1 visa) or DS-2019, formerly called IAP-66 (If you have a J-1 visa) or FMIS-45 (If you have B visa).
- 10. Copy of passport (photo page) and visa (if you are an international student)
- 11. W-8BEN
- 12. Copy of Permanent Resident Card (for permanent residents only)

**\*\*\*\*All receipts and/or credit card statements should clearly reflect that the award recipient was the purchaser (name, last four of credit card) and receipt amounts must match credit card amount.**

**We strongly encourage you to make a photocopy of all materials for your reference.**

Signatures:

1) Applicant

Date

2) GSO Representative (or a GSO officer)

Date