# Reimbursement Decision Chart

| Who are you helping? | Have you been paid by Purdue before? | Has anything changed? | *Additional Info* | What is their citizenship status? | Is Glacier required? | *Additional Info* | Required Documents |
|---|---|---|---|---|---|---|---|
| **Purdue Employee** | N/A | No | | Citizen | No | | Employee Reimbursement Form, Receipts |
| **Purdue Employee** | N/A | Yes | Address needs to match Success Factors; Banking information should match SF & PaymentWorks | Citizen | No | | Employee Reimbursement Form, Receipts; State within TDX submission- employee's banking information has changed from the last time they were reimbursed and has been updated in SuccessFactors but needs updated with PaymentWorks |
| **Purdue Employee** | N/A | No | | Non-Resident Alien or Foreign Entity | Yes | Email busproc@purdue.edu to request initiation of Glacier. Once initiated, an email from support@online-tax.net will be sent to the individual. Once individual completes Glacier requirements, they will need to provide Glacier documents to you to finalize payment submission packet. | Employee Reimbursement Form, Receipts, Glacier Documents |
| **Purdue Employee** | N/A | Yes | Address needs to match Success Factors; Banking information should match SF & PaymentWorks | Non-Resident Alien or Foreign Entity | Yes | Email busproc@purdue.edu to request initiation of Glacier. Once initiated, an email from support@online-tax.net will be sent to the individual. Once individual completes Glacier requirements, they will need to provide Glacier documents to you to finalize payment submission packet. | Employee Reimbursement Form, Receipts, Glacier Docuemtns; State within TDX submission- employee's banking information has changed from the last time they were reimbursed and has been updated in SuccessFactors but needs updated with PaymentWorks |

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|---|---|---|---|---|---|---|---|
| **NonEmployee** | Yes | No | | Citizen | No | | Payee Certification (PC) Form, Receipts |
| **NonEmployee** | Yes | Yes | Address & Banking Information needs to match in PaymentWorks; Proceed to submit via TDX Personal Reimbursement tile making note the vendor's information has changed | Citizen | No | | Payee Certification (PC) Form, Receipts; State within TDX submission-vendor's information has changed and EOBOC will initiate request in PaymentWorks for update to the individual's information. Once PaymentWorks confirm changes, EOBOC Procurement will submit payment as long as they have all required information (documents, account, GL) |
| **NonEmployee** *New vendor to Purdue and has receipts ready for submission* | No | N/A | | Citizen | No | | Payee Certification (PC) Form, Receipts; State within TDX submission-vendor is new and EOBOC will initiate request in PaymentWorks for creation of account. Once PaymentWorks confirm changes, EOBOC Procurement will submit payment as long as they have all required information (documents, account, GL) |
| **NonEmployee** | Yes | No | | Non-Resident Alien or Foreign Entity | Yes | Email busproc@purdue.edu to request initiation of Glacier. Once initiated, an email from support@online-tax.net will be sent to the individual. Once individual completes Glacier requirements, they will need to provide Glacier documents to you to finalize payment submission packet. | Payee Certification (PC) Form, Receipts; Glacier Documents |
| **NonEmployee** | Yes | Yes | Address & Banking Information needs to match in PaymentWorks; Proceed to submit via TDX Personal Reimbursement tile making note the vendor's information has changed | Non-Resident Alien or Foreign Entity | Yes | Email busproc@purdue.edu to request initiation of Glacier. Once initiated, an email from support@online-tax.net will be sent to the individual. Once individual completes Glacier requirements, they will need to provide Glacier documents to you to finalize payment submission packet. | Payee Certification (PC) Form, Receipts; Glacier Documents; State within TDX submission-vendor's information has changed and EOBOC will initiate request in PaymentWorks for update to the individual's information. Once PaymentWorks confirm changes, EOBOC Procurement will submit payment |

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| **NonEmployee**<br>*New vendor to Purdue and has receipts ready for submission* | No | N/A | | Non-Resident Alien or Foreign Entity | Yes | Email busproc@purdue.edu to request initiation of Glacier. Once initiated, an email from support@online-tax.net will be sent to the individual. Once individual completes Glacier requirements, they will need to provide Glacier documents to you to finalize payment submission packet. | Payee Certification (PC) Form, Receipts, Glacier Documents; State within TDX submission-vendor is new and EOBOC will initiate request in PaymentWorks for creation of account. Once PaymentWorks confirm changes, EOBOC Procurement will submit payment as long as they have all required information (documents, account, GL) |
| **Vendor**<br>*You're planning ahead for a future payment to a vendor and wanting to establish them in PaymentWorks.* | No | N/A | | N/A | N/A | Use the New/Change Vendor (ZV60) tile in order for EOBOC Procurement to initiate setup with PaymentWorks. | |
| **NonEmployee Travel**<br>*If this is ONLY for travel reimbursement* | N/A | N/A | Can be processed as a One-time Payment. | N/A | N/A | | Form 17C, ACH Form, Receipts |
| **Prospective Employee**<br>*If the candidate attend alone* | N/A | N/A | Can be processed as a One-time Payment | N/A | N/A | | Form 17C, ACH Form |
| **Prospective Employee**<br>*If the candidate attend with a dependent* | N/A | N/A | Can be processed as a One-time Payment | N/A | N/A | | Form 17C, ACH Form, Payee Certification Form, Receipts |
| **Purdue UG Student**<br>*Reimbursement is NOT work related* | N/A | N/A | | Citizen | No | | Contact Erin Steinfort with the below information: Student Name, Email, Reason for Payment, Account #, Approval email to pay, Receipts |
| **Purdue UG Student**<br>*Reimbursement is NOT work related* | N/A | N/A | | Non-Resident Alien or Foreign Entity | Yes | Email busproc@purdue.edu to request initiation of Glacier. Once initiated, an email from support@online-tax.net will be sent to the individual. Once individual completes Glacier requirements, they will need to provide Glacier documents to you to finalize payment submission packet. | Contact Erin Steinfort with the below information: Student Name, Email, Reason for Payment, Account #, Approval email to pay, Receipts, Confirmation Glacier sent |
| **Purdue UG Student**<br>*Reimbursement is work related* | N/A | N/A | N/A | | | N/A | Submit under standard reimbursement process including a Payee Certification. |
| **Purdue MS Student** | N/A | N/A | | N/A | N/A | | Direct students to Sherry Smith and standard reimburemsent process will be followed |
| **Purdue Doctoral Student** | N/A | N/A | | N/A | N/A | | Direct students to Quintin Martin and standard reimburemsent process will be followed |