

Reimbursement Decision Chart

Have you been paid by							
Who are you helping?	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	No		Employee Reimbursement Form, Receipts
Purdue Employee	N/A	Yes	Address needs to match Success Factors; Banking information should match SF & PaymentWorks	Non-Resident Alien or Foreign Entity	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

Have you been paid by							
Who are you helping?	Purdue before?	Has anything changed?	Additional Info	What is their citizenship status?	Is Glacier required?	Additional Info	Required Documents
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 <i>New vendor to Purdue and has receipts ready for submission</i>	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

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
NonEmployee <i>New vendor to Purdue and has receipts ready for submission</i>	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 <i>You're planning ahead for a future payment to a vendor and wanting to establish them in PaymentWorks.</i>	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 <i>If this is ONLY for travel reimbursement</i>	N/A	N/A	Can be processed as a One-time Payment.	N/A	N/A		Form 17C, ACH Form, Receipts
Prospective Employee <i>If the candidate attend alone</i>	N/A	N/A	Can be processed as a One-time Payment	N/A	N/A		Form 17C, ACH Form
Prospective Employee <i>If the candidate attend with a dependent</i>	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 <i>Reimbursement is NOT work related & UG Student does NOT hold an ACTIVE UG Student PAID position</i>	N/A	N/A	Ask additional question of UG students: Do you hold an ACTIVE UG Student PAID position? If so, refer to decision flow below.	Citizen	No		Contact Erin Steinfert with the below information: Student Name, Email, Reason for Payment, Account #, Approval email to pay, Receipts
Purdue UG Student <i>Reimbursement is NOT work related & UG Student does NOT hold an ACTIVE UG Student PAID position</i>	N/A	N/A	Ask additional question of UG students: Do you hold an ACTIVE UG Student PAID position? If so, refer to decision flow below.	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 Steinfert with the below information: Student Name, Email, Reason for Payment, Account #, Approval email to pay, Receipts, Confirmation Glacier sent
Purdue UG Student <i>Reimbursement is NOT work related & UG Student does NOT hold an ACTIVE UG Student PAID position</i>	N/A	N/A	Ask additional question of UG students: Do you hold an ACTIVE UG Student PAID position? If so, refer to decision flow below.			N/A	Submit under standard reimbursement process including a Payee Certification.
Purdue UG Student <i>Reimbursement is work related + UG Student is in an ACTIVE UG Student PAID position</i>	N/A	No		Citizen	No		Employee Reimbursement Form, Receipts

Purdue UG Student <i>Reimbursement is work related</i> <i>+ UG Student is in an ACTIVE UG Student PAID position</i>	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 UG Student <i>Reimbursement is work related</i> <i>+ UG Student is in an ACTIVE UG Student PAID position</i>	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 UG Student <i>Reimbursement is work related</i> <i>+ UG Student is in an ACTIVE UG Student PAID position</i>	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 Documents; 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 MS Student	N/A	N/A		N/A	N/A		Direct students to Sherry Smith and standard reimbursement process will be followed
Purdue Doctoral Student	N/A	N/A		N/A	N/A		Direct students to Quintin Martin and standard reimbursement process will be followed