

MMM Reimbursement Policies and Procedures

Reimbursement Policies:

- Students must receive pre-approval from MMM administrative staff.
- Please plan ahead and consult with MMM administrative staff to make your purchase through the University purchasing systems instead of from your personal funds whenever possible.
- Northwestern University is **tax exempt**. Please use a **Tax-Exempt One-Time Use Letter** each time you make a purchase to ensure you are not being charged for exempt taxes. The MMM Associate Director or MMM Program Assistant must sign the tax-exempt letter before use.
 - Please note that there are a few exceptions to tax exemption, including hotels and restaurants. If you have any questions about whether a purchase is tax exempt, please contact the MMM Program Assistant for assistance.
 - If you are charged for taxes in which the University is exempt from paying, you will not be reimbursed for the tax amount paid.
- Reimbursements are governed by two policies:
 - Northwestern Travel & Entertainment Policy
 - McCormick Entertainment Guidelines

Reimbursement Procedure:

- Submit the following items to MMM Program Assistant, Sarah Budreck at Sarah.Budreck@northwestern.edu or drop off at MMM Staff Office 3.320 in Ford Building
 - **Visitor's Expense Report (physical or DocuSign signature)**
 - Name, Current Mailing Address, Phone Number and Email
 - Business Purpose (e.g. "Integration Project – Nissan site visit on June 21," or "SEC DE&I Dinner")
 - Inclusive dates of travel (if applicable)
 - Expense items and amounts that are being claimed. (Add detailed explanations)
 - Sign and date under the "Visitor: Certification Signature Required" box.
 - **Must** be either a physical or DocuSign signature. Electronic signature not accepted unless through DocuSign.
 - **W-9 (physical or DocuSign signature)**
 - Only needed for first expense

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- **Guest attendance list**
 - **All itemized receipts**
 - Forms are available on MMM website under [Student Resources section](#)
2. If forms are not physically signed, you will receive a request from MMM Program Assistant via DocuSign for your signature
 3. After all documents are submitted & signed, MMM Program Assistant will submit to Associate Director then McCormick for approval
 4. After all approvals, you will receive payment via a check in the mail in approximately 1-2 weeks

Important Notes for Reimbursements:

- Can NOT reimburse for tax
- Visitor's Expense Report **must** be physically signed (printed, signed, scanned) **or** send to Program Assistant unsigned and you will receive a request to sign via DocuSign
- Only need to submit a W-9 the first time
- International students do not need to submit a W-9 if they don't have a tax identification number
- For any events, an attendee list must be provided with the Visitor's Expense Report