

CONTROLLER'S UNIT BUSINESS PROCESS FORUM OSU FOUNDATION REIMBURSEMENTS MADE SIMPLE!

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Zoom



Oregon State
University

Processing OSU Foundation Reimbursements

The Accounting Service Center is now offering OSU Foundation Reimbursement processing for all colleges/units.

As part of our regular workflow, each week, the Accounting Service Center team pulls a list of outstanding OSU Foundation transactions and submits them through the reimbursement system for processing.

To ensure consistency, accuracy, and efficiency, we follow a structured approach to the 5 W's framework:

Framework:

-  Who
-  What
-  When
-  Where
-  Why

The 5 W's

	Travel Expense	Other Expenses
Summary	<u>[Activity Code] + Short Description of Expense + Last Name + Transaction Date</u>	
Ex.	BENB PI Conference Beaver May 2025	BENB Lab Equipment Beaver May 2025
Who	<u>Traveler or Vendor</u>	
Ex.	Benny Beaver	Olympus Microscopes
What	<u>Activity/Supplies</u>	
Ex.	Hotel Expense	Microscope, coverslips, etc.
Where	<u>Destination City</u>	
Ex.	Portland, OR	Corvallis, OR
When	<u>Date of purchase (or travel)</u>	
Ex.	May-25	May-25
Why	If not enough info is provided in the comments or the backup, will need to reach out to stakeholder for additional justification.	
Ex.	Attend National Grant Conference May 2025	New microscope and supplies

Processing OSU Foundation Reimbursements

The Accounting Service Center will consistently use the **5 W's framework** when processing OSU Foundation Reimbursements to ensure clarity and uniformity.

The Accounting Service Center's goal is to **provide flexibility while ensuring consistency** for those who use our services.

If you have questions regarding a submitted OSU Foundation reimbursement, please contact the originator of the request directly, as noted on the bottom of the form.

Next Steps

We are working with the FSS Financial Strategic Partners to identify which OSU Foundation indexes should be processed by the Accounting Service Center.

If your unit processes OSU Foundation reimbursements internally, please contact us at FSS.Accounting@oregonstate.edu to discuss having our team process them for you.

QUESTIONS?

