Submitting Requests on GrantEd for Stanford Affiliates
2020 - 2021

What is GrantEd?
GrantEd is the financial management platform for student organizations and is the only way for organizations to access their funds. You can submit a request for reimbursement to a student group and check on any requests you have in the system on this site. This guide is meant to help you submit a request for reimbursement for yourself on GrantEd as a Stanford Affiliate. All images have alt-text.

Before Submitting the Request:
- Double check what the amount you are allowed to spend is! Double check what restrictions there are on what you can buy.
  - For example, undergraduate groups cannot reimburse alcohol.
- Make sure your receipts:
  - Are itemized (what did you buy? How much is each item?)
  - Show how you paid and when you paid (Credit card authorization under your name or a spouse’s/family member’s? Shipping or delivery confirmation?). Note that Venmo/other forms of peer to peer payment services cannot be accepted as documentation due to university policy.
  - Are in .pdf, .jpg, or .png form (.heic, which is common with iPhone pictures, is not compatible)
  - For a full list of the policies relating to documentation/what’s needed for receipts, look through our FO manual here (PDF).
- Have you opted in for direct deposit?
  - Set up direct deposit on Axess: https://sfs.stanford.edu/student-accounts/refunds/direct-deposit and make sure your mailing address is also up to date.
  - Opt-in for reimbursement on GrantEd by logging on to the site, selecting your SUNet ID at the top right, and clicking “Opt-In for Reimbursement.” This allows us to access the information you’ve given Stanford, which lets us mail you checks or use direct deposit as opposed to having to pick up from our offices.

Creating and Submitting the Request:
1. Sign in to granted.stanford.edu. Select “Stanford Affiliate” from the role selection screen. All undergraduate students, graduate students, and postdoctoral scholars should automatically have this role. Unfortunately, staff and faculty are not eligible to submit requests under this system.
2. Click on the “Payments” tab close to the top of the page. Then, click on the “New Payment Request” button.

3. This will automatically create a reimbursement request for yourself. Now, select the organization you’re requesting the reimbursement from, select the payment method, delivery method, and write the summary description. Rush processing will charge a fee to your organization’s accounts, so don’t select that option unless instructed to by your Financial Officer.

4. Now, the page will reload. You’ll see now below the information you’ve already entered a section labeled “Payment Lines, with columns underneath that look like this:

   ![Payment Lines Table]

   For each transaction you made that you want to be reimbursed for, you’ll need one payment line. So, for your first line, fill out the date the purchase was made, the document type, the name of the vendor, a short description of the items that was purchased, and the amount you want to be reimbursed for.

   **About the document type:**
   
   You should be using “receipt” in most cases. If you are unable to find or have lost the receipts necessary, be sure to discuss with your Financial Officer to let them know, as groups can only reimburse a very small number of lost receipts per year and up to a certain maximum.

   **About the amount:**
   
   In most cases, you should be reimbursed for the full amount (i.e. whatever is the total on the receipt you’re submitting is). If there is a cap on reimbursements or some personal items were purchased in the same transaction, write the amount that should be reimbursed in the amount box, and let us know this was a purposeful partial reimbursement in the Description for that line.
5. To upload documentation, press the blue paperclip between the area for Document Type and Vendor. Here, you’ll be able to upload your documentation for this purchase. Be sure to click on each file after uploading to make sure it was processed correctly.

6. If you only have one transaction you need reimbursement for, you’re done! Hit submit. If you have multiple transactions (perhaps one purchase at a restaurant, one purchase for an online vendor, another purchase at that same vendor), press the “Add Row” button and repeat steps 4 and 5.

About multiple purchases:
If you made multiple purchases from the same vendor, each separate transaction has to go on its own row. For example, if you bought something from a grocery store, then went back and bought another item the same day, both receipts should still go on their own payment line.

Once the request is submitted, it will go to your Financial Officer, who will double check your documentation, allocate funds from your group’s account, and submit it to us (Capital Group). You can check who the request is currently being assigned to by checking the progress bar under the request title in GrantEd, even after submission.

You’ll get an email once the check is printed and mailed, directly deposited, or ready for pickup on campus at our offices at Suite 103, Old Union from 9 AM to 5 PM on Mondays to Fridays (Note: due to Covid-19, pickup is currently unavailable). If you need to change a pickup check to mail, email payments@sse.stanford.edu with the address and let us know the amount and the student group you’re receiving the payment from.

If you have questions about this process, be sure to contact your Financial Officer or us at Capital Group (banking@sse.stanford.edu).