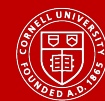
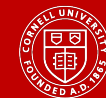


# PhD Travel Reimbursement



## In this Info Session we will cover:

- What to do before traveling
- How to plan your travel
- Misc. Reimbursable expenses
- Providing info for reimbursement
- Filling out the reimbursement form



# What to do before traveling

Did you find an interesting conference or have been invited to one?

# STOP



Speak with your Advisor **FIRST** and obtain Pre-Approval checklist [or this google sheet](#)

Once Pre-Approval checklist approved, CC or forward request to your Advisor's Admin Support person in Gates 236.

P.S. If other funding was awarded, include that info in email



# How to plan your travel

Reach out to your Advisor's admin to set up time to pay for expenses:

**International travel: All visas must be acquired before registering for conference**

## *Registrations for Conference*

- Log in to conference website for registration and when ready for payment info visit Admin

## *Transportation*

- Flight: Reach out to AAA services via email and select lowest possible fair that meets your business needs; CC Admin so they can pay. If taking personal time and not returning directly back to Ithaca after conference **you must have a comparison flight and will be reimbursed the lowest amount.**
- Bus: Ask Admin to reserve, if possible, if not keep receipts for later reimbursement
- Taxi/Uber: can be reimbursed after trip, so keep receipts.
- *Lodging:* Choose Hotel room lodging that has reasonable single room rates.
- **Must pay for own room for full reimbursement or have admin help with payment.**
- Admin cannot pay for Airbnb, must be paid out of pocket and will be reimbursed after trip

**Please make arrangements with admin in advance to make payment in person**



# Misc. Reimbursable expenses

## *Meals*

- Meals are paid out of pocket by traveler if not provided by business location or conference
- **Only pay for your own meal**
- Will be reimbursed by per diem rate (View rates on <https://www.gsa.gov/travel/plan-book/per-diem-rates>)

## *Ground Transportation*

- Mileage for driving your personal vehicle is reimbursable along with parking
- Also includes Uber, taxi, train, etc.
- Need to have receipts as proof (Legible photo is fine)
- Receipts must include amount, date, and card used (Last 4 digits)

## *Rental Vehicles*

- Rentals cannot be paid for by Staff travel cards and must be paid out of pocket
  - Receipt must be provided after trip is done and show total amount for rental
  - Cornell has discounts\* for rental agencies (View agencies at [Car Rental Discount Codes](#) )
- \*Discounts are available for personal travel also



# Providing info for reimbursement

All info must be submitted within 30 days after travel via email to receive reimbursement

## *Before travel*

- Review Non-Reimbursable Expenses

<https://finance.cornell.edu/travel/payingfortravel/nonreimbursable-expenses>

- All prior confirmation from Advisor (Triple A)
- Any information on grants awarded for travel (the full, amount of award this is before taxes will be used not what you get after taxes. If you have any questions, you can contact the tax office. [tax@cornell.edu](mailto:tax@cornell.edu))

## *During travel*

- Keep all receipts (legible photos are acceptable).
- Request folio from hotel, front desk upon checkout (Detailed folio is required)
- Airbnb confirmation of stay and proof of payment (Must include dates, card used with last four digits, Host Review Mandatory)



# Providing info for reimbursement

**All info must be submitted within 30 days after travel via email to receive reimbursement**

*After travel*

- Conference Program must be included
  - If presenting at conference, include paper/poster being presented
- Reimbursement form: Complete Part I, Part II, Part IV, Part VI only. All other information list in the body of email. This will prevent having to submit a new form if information is incorrect.
  - Student information **Part I**
  - Business Purpose for travel (5 W's – Who, What, When, Where, and Why) **Part II**
  - Dates of travel **Part II**
  - Signature **Part VI**
- Send Receipts In Email for transportation (Uber, taxi, train, etc.) and/or Personal mileage (Map of route driven)
- List Date(s) meals were provided and what meals were provided (Breakfast, Lunch, Dinner)

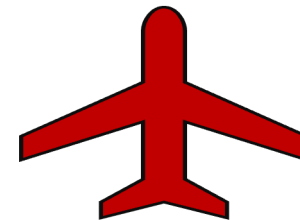
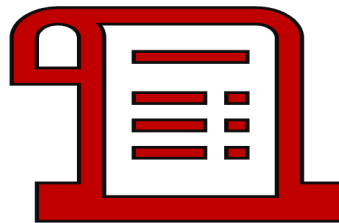
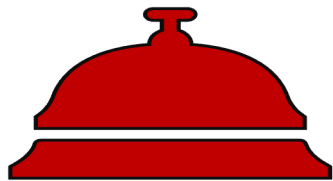


# Providing info for reimbursement

*For all accommodations traveler must provide*

- Hotel
  - Hotel Folio after checking out (Front desk will provide) (Detailed folio is required)
- Flight
  - Receipts that show flight dates, airports, amount paid, and proof of payment.

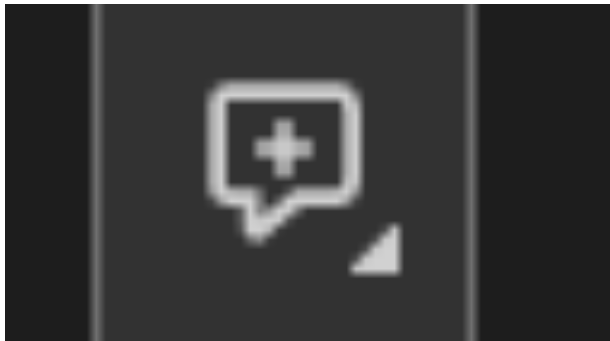
**Do not fill in amounts on the travel form** this will be completed by the admin when reviewing for submission. You can put that information in the body of the email with the submission.



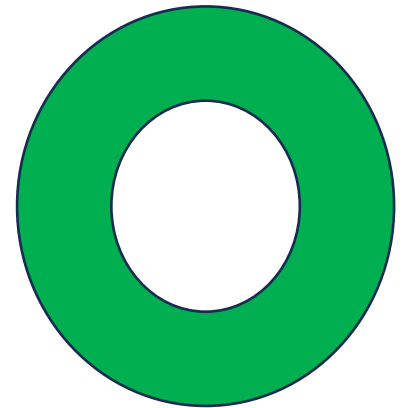


# Filling out the reimbursement form

When filling out the reimbursement form, **DO NOT** fill out the form using comments selection.  
Just click in the space you want to fill out.



Name John Doe



# Filling out the reimbursement form

Fill out the following form. Highlighted sections listed only:

<https://finance.cornell.edu/sites/default/files/travel-reimbursement-form.pdf>

## ➤ Payee Information

**Part I: Payee Information**

Name \_\_\_\_\_ Email \_\_\_\_\_

Home Address \_\_\_\_\_ Phone \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Province \_\_\_\_\_

Country United States of America \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

Campus Address \_\_\_\_\_ Unit Name \_\_\_\_\_

Relationship to Cornell  Non-Employee  Student  Other (Please explain) \_\_\_\_\_

## ➤ Trip Information (5 W's – Who, What, When, Where, and Why)

**Part II: Trip Information**

Business Purpose of Trip/Expenditure \_\_\_\_\_

Departure Date \_\_\_\_\_ Departed From \_\_\_\_\_ Going To \_\_\_\_\_

Return Date \_\_\_\_\_ Returned From \_\_\_\_\_ Returned To \_\_\_\_\_

BP example: Travel reimbursement for expenses related to John Doe traveling to New Orleans, LA on December 25-31, 2023, to attend the IWISH conference and present a poster titled “If I Win the Lottery”.

## ➤ Expense Information

### Part III: Expense Information

Please do not complete this section, place the information in the email and your admin will complete the form

## ➤ Payment Information

### Part IV: Payment Information

How will this payment be disbursed to the payee?

- Direct Deposit\*
- Campus mail to address above
- U.S. Mail to home address above

\*To receive payment by direct deposit, you must [enroll in direct deposit for reimbursements](#). If you aren't sure whether you've already signed up, contact your business service center.



# Filling out the reimbursement form

Fill out the following highlighted sections

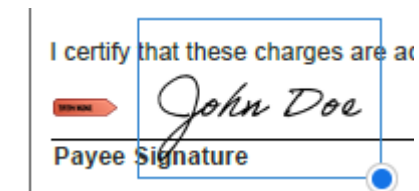
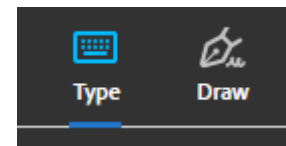
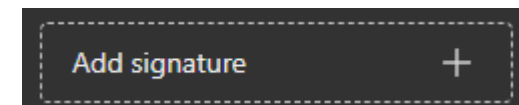
## ➤ Payee Certification and Approvals

- To apply signature
  - Click Fill & Sign
  - Add Signature
  - Type or Draw signature and apply
  - Drag and drop signature
- To save form
  - Print or Ctrl + P
  - Print to Microsoft PDF

Part VI: Payee Certification and Approvals

I certify that these charges are accurate and that I am not claiming reimbursement from another source.

Payee Signature \_\_\_\_\_ Date \_\_\_\_\_



***If you run into problems or have questions, reach out to your Admin***



# Extra! Personal time during business travel

Reimbursement is only for days of business or conference travel

Extra personal days are not covered under Cornell Travel Policy. This includes, but is not limited to: Visiting family/friends, Sight seeing, Vacation time, etc.

All previously mentioned reimbursable expenses must be reported in an email, or attached to email, or on Page 3 of Reimbursement form under **'Other Additional Explanations and Notes'** **Must send in a comparison flight. You will only be reimbursed at the lower amount.**

Other Additional Explanations and Notes

