PhD Travel Reimbursement

Cornell Bowers C·IS
College of Computing and Information Science

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

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How to plan your travel

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

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

Cornell International Travel Registry Must be completed before travel:

https://gradschool.cornell.edu/policies/international-travel-registry/

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/Lyft: can be reimbursed after trip, so keep receipts. (You cannot be reimbursed for Uber cash)

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.
➢ Cornell policy states "…Cornell **strongly discourages** using Airbnb…" "**You must not book a stay at an e-commerce accommodation on behalf of another individual or group** because you cannot accept that risk on another person's or group's behalf." https://finance.cornell.edu/travel/booking/lodging

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
➢ Includes Uber, taxi, train, etc. (If payment is made with Uber cash, it is not reimbursable)
➢ 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, with gas receipts for rental

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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 <u>grants awarded for travel</u> **(The full amount of award before taxes will be used, not the amount after taxes. If you have any questions, please contact the tax office. tax@cornell.edu)**

During travel

➢ <u>Keep all receipts</u> (legible photos are acceptable).

➢ Request folio from hotel, front desk upon checkout (Detailed folio is required) (If you have booked through a third party, most hotels will not give you detailed folio, you will need to request a statement showing you checked in and checked out.)

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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 only. All other information list in the body of email. Once we have filled in all the other information, we will send it back to you for final review and signature.
➢ **Travel Form**
   ➢ Student information **Part I**
   ➢ Business Purpose for travel (5 W's – Who, What, When, Where, and Why) **Part II**
   ➢ Dates of travel **Part II**
➢ Send receipts in email for transportation (Uber, taxi, train, etc.) and/or personal mileage (Map of route driven is required)
➢ 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) (If you have booked through a third party, most hotels will not give you detailed folio, you will need to request a statement showing you checked in and checked out.)

➢ Flights

  ➢ Receipts that show flight dates, times, airports, amount paid, and proof of payment.

➢ Additional Receipts

  ➢ Make sure all receipts show last 4 digits of credit card, if it does not, please send a snip it from your cc statement showing the vendor, date, and amount
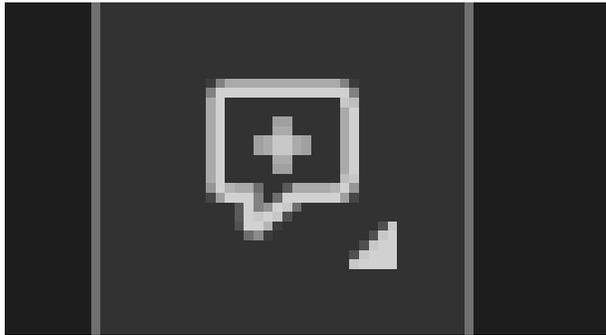
  Do not fill in $ amounts on the travel form this will be completed by the admin when reviewing for submission. You can put that information in the body of the email with the submission.
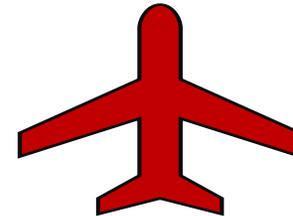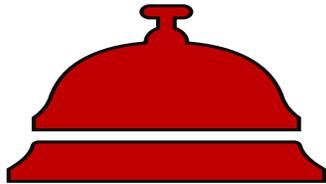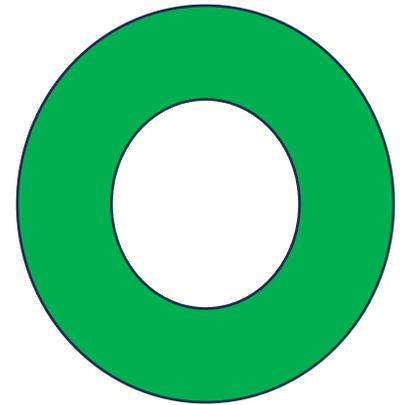
Filling out the reimbursement form

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

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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.

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Extra! Personal time during business travel

Reimbursement is only for days of <u>business or conference travel</u>
Extra personal days are <u>not covered under Cornell Travel Policy</u>. 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 include a comparison flight. You will only be reimbursed at the lower amount.**

Other Additional Explanations and Notes

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Final Signature on Travel Form

Once the admin has prepared the reimbursement for processing, they will send you the travel form with the calculated numbers inserted. Please review them and if in agreement and no changes are needed, please sign and return the form so they can submit your travel reimbursement
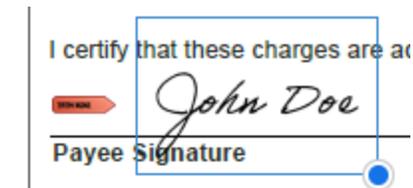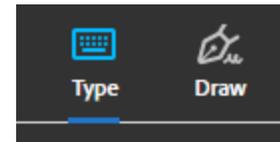
➢ Payee Certification and Approvals

  ➢ 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

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

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

Fill & Sign

Add signature   +

Type   Draw

I certify that these charges are a⊂
John Doe
Payee Signature

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