

Requesting a Reimbursement for Travel and Other Expenses

Prior to booking your travel to any destination, please speak with your group's faculty support assistant. There are various policies and regulations that must be followed and violation of these could preclude your expenses.

This is especially important if you have not traveled before.

University policy and federal uniform guidelines can be confusing. It is recommended, and preferred, that you allow the faculty support assistant to enter in the expenses on your behalf. Faculty support assistant and their constituents are listed below.

Overview of Policy

- You **must** keep your original, itemized receipts and turn these in with a hard copy of your report; airfare quotes are not receipts.
- We recommend using the appropriate per diem allowance rather than keeping meal and incidental receipts (*please check with your advisor first if receipts are preferable*) – you **must** attach the GSA/Department of State per diem sheets to your report. You are not required to take the full per diem and a mutually agreed upon amount should be discussed with your advisor prior to travel.
- Your advisor must **review and sign** the report to confirm the charges are appropriate, the proper funding source used, and this must be included in the report.
- If you are traveling internationally, you **must** adhere to the Fly America Act/Open Skies Agreement – not doing so jeopardizes your reimbursement for air travel.
- **Egencia** should be used as often as possible to allow for direct billing of airfare, hotels and rental cars; ***please see your faculty support assistant for assistance if you have never utilized Egencia.***
- Alcohol is **never** allowed to be charged to a federal grant (sponsored project).
- While tempting, please **avoid** combining business and personal travel. If you do, you **must** discuss this PRIOR to booking any travel. Please see your faculty support assistant for details.
- All direct billed travel **must** be uploaded into the report (air itinerary, receipt for hotel charges, etc.) We will mark these as a “personal expense” which will exclude these from reimbursement to you.
- These policies and regulations are non-negotiable and strictly enforced by the department, the college, the university and the project entity, i.e. the federal government agency, foundation, corporation.
- If you are claiming mileage for your personal auto, you need to include a map showing your origination and destination points. Enter in the mileage into the report and reimbursement is automatically calculated. Special note: If travel is 300 miles or greater, and you plan to drive, you **MUST** meet with your faculty support assistant as special rules are applied.

Domestic vs. Foreign Travel

Travel within the U.S., its territories and Canada is considered domestic travel and all entries on the report will be designated as “domestic” travel. Please see your faculty support assistant with information regarding per diem entry.

All other travel is foreign and all entries (including local cab rides) must be coded as “foreign” travel.

Why is this? All projects, during the pre-award phase are budgeted as either “domestic” or “foreign” and your trip will “roll-up” into the governing accounting code for which it is budgeted in the award.

Helpful Hint: Sponsored projects are routinely audited. When traveling, always ask yourself, "As a taxpayer, does this charge seem reasonable and allowable?" If it does not, you will probably not be reimbursed for it.

Reimbursement Matrix

Criteria	Reimbursement Method Options	
	Per Diem	Actual Expenses**
Lodging		X
Meals and Incidentals	X	X
Trip duration is less than or equal to 12 hours		X
Trip duration is greater than 12 hours	X	X
First day of travel	75% of the per diem rate	X
Last day of travel	75% of the per diem rate	X

** Itemized receipts must be submitted for reimbursement. Meals must comply with policy limits.

To calculate deductions for meals provided:

Domestic travel: <http://www.gsa.gov/portal/content/101518>

Foreign travel: http://aoprals.state.gov/content.asp?content_id=114&menu_id=81

University Travel Policy

<https://www.northwestern.edu/financial-operations/policies-procedures/policies/travel.pdf>

Fly America Act and Open Skies Agreement

<https://www.northwestern.edu/asrsp/expenses/travel.html>

Expense	Incidental Expenses* Part of the M&IE per diem rate	Additional Expenses** Receipts required
Tips and fees given to porters, baggage carriers, bellhops, hotel maids, stewards or stewardesses and others on ships.	X	
Transportation between places of lodging or business and places where meals are taken, if suitable meals cannot be obtained at the travel location.		X
Shuttle, limousine, or livery service charges, to and from airports and railroad stations plus reasonable tips, where such costs do not exceed comparable taxi fare.		X
Internet connections for business use at hotels, conference sites, airports and Internet cafes while traveling.		X
Taxi fares, including tips, to and from airports and railroad stations.		X
Mailing cost associated with filing travel expense reports.		X

Faculty Support Assistants*

Pam Villalovoz Research Group Support:

- Carrasco
- Dahl
- de Gouvea
- Fauchere-Giguere
- Figueroa-Feliciano
- Fong
- Hahn
- Kalogera
- Larson
- Lithwick
- Low
- Margutti
- Meyer
- Novak
- Petriello
- Rasio
- Schmitt
- Seth
- Tchekovskoy
- Ulmer
- Velasco
- Yusef-Zadeh

Cristian Pennington Research Group Support:

- Bostedt
- Chandrasekhar
- Driscoll
- Dutta
- Halperin
- Jacobsen
- Ketterson
- Koch
- Motter
- Sauls
- Schwab

Laura Nevins Research Group Support:

- Gabrielse
- Geraci
- Goswami
- Kovachy
- Odom
- Stern

*This list is subject to change, and changes will be communicated to the department.