EMPLOYEE TRAVEL

Faculty and staff are eligible to receive support for university-related travel. Employees should not make any travel arrangements until they have met with their department chair/supervisor to discuss the anticipated travel and outline a plan for funding support. After this initial approval, the employee and supervisor must complete the following steps outlined below. Please note that travel is prioritized for promotion or tenure-related activities that are mission critical.

CONTACT
Mary Ellen Grot
Administrative Assistant, Office of the Dean
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GUIDELINES

REIMBURSEMENT METHODS (choose one)

Method 1: Unreceipted Method

- In general, reimburses less than Method 2.
- Is often used when a hotel is not needed.
- Provides a flat rate allowance for meals, lodging, and incidental expenses regardless of what type of lodging is obtained. (This includes lodging with relatives or friends). Rates established based on the city or county of lodging or location of official campus business (whichever is less). The location must be identified on voucher.
- Current rates can be found on the GSA website.

Method 2: Receipted Method

- Submit itemized hotel receipt in employee's name or documentation showing proof of travel (e.g. airline ticket). If a hotel receipt cannot be provided, submit a copy of a registration indicating lodging is included in the cost.
- If sharing a room with another employee, one-half of the double room charge may be claimed by each person. Separate itemized receipts should be requested of the hotel for each traveler to claim per diem rates for meals.
- Meal allowance rates are based on 20 percent for breakfast and 80 percent for dinner of the full allowance pertaining to the traveler's destination. Current rates can be found on the GSA website.

REIMBURSABLE EXPENSES – DETAILS

Domestic Travel

- Determine the current per diem rates for the travel location on the GSA website.
- Determine the meal breakdown on the Meals and Incidentals page to (20% breakfast, 80% dinner)

International Travel

- Determine the lodging and meal per diem rates for the travel location on the U.S. Dept. of State website.
- Complete the required U.S. Export Controls form two weeks prior to travel.
- Receipts submitted in foreign currency can either be reimbursed using the credit card statement showing each charge in USD or by converting the foreign currency amount using the online Currency Converter. Note that the traveler must choose the specific date the payment was made and print the conversion amount and include with the reimbursement paperwork.

Transportation

- Flight and train receipts must include traveler name, travel details, and proof of payment.
- Direct Travel (Phone 800-774-0655) is a convenient way to arrange air and train reservations. If flights are purchased independently rather than through an agent, submit a justification showing that the cost is similar to what is offered through Direct Travel. Research options to ensure the best price/reasonable rates.

Meals & Incidentals

- On the day of departure, breakfast is only reimbursed if the traveler leaves before 7:00 a.m.
- On the day of return, dinner is only reimbursed if the traveler returns after 7:00 p.m.
- If breakfast or dinner is included at the hotel or conference/event, they cannot be reimbursed.
- If breakfast is listed as continental, it is allowable to reimburse.
- NYS does not reimburse employees for lunch.
- Traveler is allowed lodging and meals for weekends when it is necessary to be in travel status.
- NYS does not reimburse incidental expenses separately from the M&IE allowance; therefore, expenses such as tips for hotel staff should not be requested or expected.

Lodging

- Lodging receipt must include traveler name, lodging details, and proof of payment.
- When applicable, travelers are expected to use the conference hotel, which generally offers the best rates.
- Maximum lodging rates exclude taxes. New York State tax is not reimbursable. When lodging within New York State, provide a Tax Exemption Certificate to the hotel (may need Government ID).
- If lodging is outside of New York State, state and local taxes are reimbursable and are not included in the lodging per diem rates.
- The employee is only entitled to a reasonable amount of time to conclude the business-related purpose of the trip. Any stay before or beyond that time is considered personal time and expenses cannot be reimbursed.

IMPORTANT!

- Travel funds expire with each fiscal year. Delays in submitting a completed travel voucher may result in a loss of funds for reimbursement due to the lapsing fiscal year.
- If an employee submits a travel voucher without having previously submitted an authorization form and received approval, there is no guarantee of reimbursement.

BEFORE TRAVEL – Travel Authorization

Employees MUST submit a travel authorization form prior to travel and before making any purchases related to travel. This process serves three purposes:

- To notify the chair and dean about upcoming work-related absences
- To provide a mechanism by which the funds are encumbered to ensure payment for travel
- To enable the department and dean's offices to budget and plan accordingly

1. Complete the Travel Authorization and Estimated Expenses form. If attending a conference, indicate if traveler will engage in a poster session or presentation.

2. Gather supporting documentation including:
   a. Event agenda/schedule or notification
   b. Transportation estimate: Provide screenshot/copy of transportation options.
   c. Lodging estimate: Provide a screenshot/copy of selected room and pricing.
   d. Other estimates such as costs for taxis, registration, entrance fees, etc.

3. Submit completed form and supporting documents to Mary Ellen Grot in the Dean's office.

AFTER TRAVEL - Reimbursement

Employees must submit a reimbursement form and receipts. Please allow time for the Travel Services office to reimburse travel, they review and process reimbursements in the order they are received. The sooner a travel voucher is completed, the sooner reimbursement will be made.

1. Documentation for reimbursement should be submitted within 30 days of return from travel.

2. The employee and department completes the appropriate reimbursement form.
   - **NYS Funding:** Use the NYS Travel Voucher
   - **Foundation Funding**: Use the Accounts Payable Travel Payment Request Form

3. Specify the dates and purpose of the activity, expenses and amounts, and backup justification (e.g. flier, conference brochure). Complete the personal information sections. Summarize reimbursable expenses on the form and/or a separate document so that all details and dates are clearly outlined.

4. All receipts should accompany the form and be forwarded to Mary Ellen Grot in the Dean's Office.
   - Indicate in the notes section of the authorization form if the lodging chosen is a conference hotel. If another hotel is used, the traveler must adhere to the lodging per diem for that location.
   - If the hotel cost over the maximum lodging per diem, an Over-the-Max Form must be attached.
   - If a personal vehicle was used during travel, the Statement of Automobile Travel Form must be attached, along with an overview (Google, MapQuest) of the trip. If an E-ZPass was used, a billing statement should be provided.

5. Once reviewed, Mary Ellen will return the documents to the appropriate designee to submit in Bengal Buy.

Please review the Travel Services website for more details pertaining to travel procedures at https://accountspayable.buffalostate.edu/travel-services

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