OUT-OF-POCKET REIMBURSEMENT POLICIES

Out-of-Pocket Reimbursements

• Defined as research/business related expenses paid for with employee’s own money.
• Examples: Copies, books, research materials, etc.
• P.I. pre-approval and proof of purchase documentation required.
• What constitutes a receipt? Document must be original and show:
  - Date of the Transaction
  - Description of item(s) purchased
  - Cost of Item(s)
  - Method of Payment

  NOTE: If your name doesn’t appear on receipt, please sign and date the receipt.

• Procedure
  - Step 1: Fill out “BFS Purchase Order Request Form”
    • Note: On the form, you are the vendor.
  - Step 2: Attach all original receipts and documentation
  - Step 3: Get P.I. Approval/Signature
  - Step 4: Submit “BFS Purchase Order Request Form” with all documentation to Huy.

PARTICIPANT PAYMENT POLICIES

Participant Payments

• Some research projects have participant payments for those taking part in the study.
• Payment plan required and must be approved by the Dean’s Office well before the start of interviews/focus groups.
• Usually PI will work with Mia Reiser to figure out a payment plan, but GSRs have in the past worked with Mia as well.
**ENTERTAINMENT POLICIES**

**Entertainment Policies**
- Entertainment events usually hosted/conducted by Project Directors or Principal Investigator. GSRs sometimes host Focus Groups.
- All Entertainment Events must be **pre-approved** by the Dean’s Office.
- Procedure
  - **Step 1:** Fill out Entertainment Pre-approval Form, get PI approval, and obtain participant waiver.
  - **Step 2:** Submit to Huy Luong
  - **Step 3:** If approved, you will get copy of Form, signed by Dean’s Office
  - **Step 4:** After event is held turn in documentation of payment for food/drink—(i.e receipt)

**TRAVEL POLICIES**

**Things to keep in mind before you travel**
- Keep Original and Itemized Receipts
- Individual Receipts Only
- Hotel Bills must have a Zero balance
- Personal Days are allowable, but must be documented with signed and dated memo.
- Lowest Cost Alternative; be as economical as possible for all travel expenses.
- No Commuter Mileage can be claimed.

**Central Travel System (CTS) Forms**
- Purpose: Pre-payment of airfare/train fare
- Process
  - **Step 1:** Fill out “Navigant Travel Reservation Request Form”
  - **Step 2:** “CTS Authorization Form”
  - **Step 3:** Confirmation and Receipt

**Travel Cash Advances**
- Funds for non-airfare travel expenses can be advanced to a traveler.
- Approval from the Dean’s Office and PI required.
• Traveler must draft budget of expected costs and submit form well in advance of travel.

**Meals and Incidentals Reimbursement Policy**

• Guidelines for single day travel
  - Required duration of trip for claiming Meals/Incidentals: At least 10 hours from when you leave home/office to when you return to home or office.
  - Daily Maximum claimable amounts for overnight travel:
    • $33 for trips more than 10 hours but less than 24 hours
    • $50 for trips more than 24 hours and less than 30 days

• Original, Itemized, and Individual Receipts

**Proper Documentation**

All documentation must be original and only have expenses for the traveler claiming reimbursement.

• Airfare: Official Itinerary & Receipt
• Car Rentals: Rental Agreement, Rental Receipt, & Gas Receipt(s)
• Conference Registration Fee: Receipt
• Hotel: Original Itemized Hotel Bill w/ zero balance
• Meals and Incidentals: Original receipts
• Taxi/Shuttle: Receipts showing fare and any tips
• Meeting/Conference: Meeting agenda, conference brochure

**Requesting a Travel Reimbursement**

• Must obtain approval and signature of P.I.
• Process
  - **Step 1:** Fill out Travel Reimbursement Form, either
    • Overnight
    • Daily (usually for multiple locations)
  - **Step 2:** Attach all original documentation with paper clip and submit to Travel preparer (Huy) for creation of Travel voucher.
  - **Step 3:** Once travel voucher has been prepared, it will be returned to you for signature and re-submission to travel preparer (Huy).