

MEDICAL STUDENT RESEARCH

TRAVEL GUIDELINES

- All travel requests should be completed on The Upstate Foundation, Inc. Travel Expense Voucher (I will provide this to you when you are ready to request reimbursement).
- **Original** travel receipts must be attached to the travel voucher along with the **conference agenda/brochure**. If the Upstate Foundation is not the sole source of reimbursement the other source should be noted and copies attached.
- Requests for airfare reimbursement must be accompanied with a **copy of the flight itinerary** and proof of payment.
- Rental cars are reimbursable if justifiable and economical.
- Maximum lodging reimbursement depends on the area of assignment and is based on the current federal per diem rate schedule. If lodging exceeds the maximum per diem it should be reasonable. In some cases it may be necessary to obtain justification (i.e. lodging at the conference site reduces other costs.) The final hotel invoice must be itemized, show a payment received and have a “zero” balance.
- Reimbursement based on the federal per diem allowance for the area of assignment or traveler may submit reasonable, itemized, original receipts.
 - Eligible for breakfast on day of departure if departure is prior to 7 AM.
 - Eligible for dinner on day of return if return occurs after 7 PM.
 - Lunch is not a reimbursable expense.
 - If meals are included in conference fee, the meal allowance must be reduced.
 - Reimbursement is either per diem or receipt based, not mixed.
- Mileage reimbursement is based on current IRS rate.
- **Original receipts are required.** If receipts are missing for miscellaneous items, such as parking, tolls, taxi, etc., an explanation may be submitted instead. Actual, reasonable, and necessary expenses for business purposes will be reimbursed.

Travel Checklist

- Agenda/Name badge
- Itemized hotel invoice showing a “zero” balance due
- Original receipts for meals, taxis, tolls, registrations fees, misc. expenses
- Airline itinerary
- Mileage destination determined by Mapquest.com
- Internet reservations require itinerary and copy of credit card statement proving payment was made
- Note other source of travel reimbursement and provide copies of request to other source
- Keep a “copy” of all forms and receipts that you submit for reimbursement for your records.
- If using an internet travel agency that bundles airfare and hotel charges (such as Orbitz, Expedia or Priceline), the credit card statement is necessary. In addition, the entire confirmation email with flight itinerary and hotel check in and check out dates, to include amount charged for each, and total package price (which should equal the credit card charged amounts) is also necessary.