

SUNY Upstate Expenditure Reimbursement Guidelines

1. These guidelines are intended to assist staff with determining which fund types may be used for various expenditure categories.
2. There may be some exceptions that cannot be fully reflected in this document.
3. Administration may require written justification regarding how the items purchased is program related and/or for the benefit of Upstate.
4. **Original itemized receipts are required for reimbursement of allowable meals.**

Category	Transaction Type	State or IFR Funds	Special Comments
ALCOHOL	Alcoholic Beverages	No	
AWARDS	Employee Awards/Student Awards Incentive Program	Yes	Must be part of an Award/Incentive Program approved by the Vice President
CARDS	Holiday Greeting Cards	No	
DUES	Institutional Individual Membership to:	Yes	Membership must be in the name of SUNY Upstate, not an individual
MEMBERSHIPS & LICENSES	Professional Organizations Professional Licenses	Yes Yes	Civic or Service Clubs not allowed If required to perform job duties and a benefit to Upstate If required to perform job duties and a benefit to Upstate
PROFESSIONAL DEVELOPMENT	Seminars Conferences Tuition for Professional Development	Yes	Seminars, Conferences, Travel for the seminar/conference in accordance with NYS Travel Guidelines, Memberships in the name of the institution, Books and Reference Materials- must be left on campus and available for campus use, Certification as long as not duplicated from Certification Program NDM B-29 Nurses must apply to CAP program, reference their program rules Tuition must be preapproved by AP or CAP, No Fees of any type can be paid
FLOWERS	Congratulatory/ Funeral/Illness: Employee & Immediate Family Administrative Professionals Day	No No	
GIFTS/GIVEAWAYS	Personal/Appreciation/Memorial	No	
CONSULTANTS	Program-related consultation or professional advice	Yes	Original Receipt required to document expense Independent Contractor Form must be vetted through HR first
HONORARIUMS	Non-employees	Yes	Up to \$500 ok without approval of VP, Need must be justified Speakers must pay for all hotel, meals, transportation expense and be reimbursed
MEALS	Employee Meals: (luncheons/breaks) Department Social Activity General Faculty/ Staff meetings	No No	
SUBSCRIPTIONS	Must be in name of SUNY Upstate Medical University and not employee's name	Yes	Cannot go to home address
RECRUITMENT EXPENSES	Travel to and from Interview Meals taken at Interview Moving Expenses	Yes Yes Yes	Reasonable transportation / hotel reimbursement to candidate only For Candidate Only - Candidate will be reimbursed - no lunch allowed In accordance with SUNY Policy #8200 http://www.upstate.edu/policies/documents/intra/UW_A-03.pdf
STUDENT RECRUITMENT	Food as per below - No Tax Allowed Breakfast-Not to exceed \$9.00/pp Lunch-not to exceed \$13.00/pp Dinner-not to exceed \$29.00/pp	Yes	<u>Tip is included in not to exceed amounts-No alcoholic beverages-Food for students ONLY (No employees)</u>
REFRESHMENTS FOR DEPARTMENT USE and EXPENSE		No	Including bottled water, coffee, soda etc.
NEW EMPLOYEE ORIENTATION (HR only)	Upstate HR coordinated Faculty and Staff Orientation	Yes (local authority per OSC Bulletin G-78)	Light Breakfast and lunch for HR event Departments are not allowed expenses for own orientation

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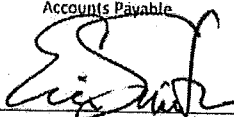
Accounts Payable

22-Apr-15

3-Aug-15 Updated

6-Feb-19 Updated

Approved by



Date 2/8/19

Eric Smith, Sr. Vice President for Finance and Administration