

GUIDE TO USING YOUR TRAVEL/RESEARCH AWARD

Congratulations on your award! We hope that this takes you a step closer to successfully completing your project. You can use your award one of two ways:

(1) Request and advance for the amount of your award and document your expenses at the end of your research trip or period. **OR**

(2) Request a reimbursement in the amount of your award at the end of your research trip or period, by submitting documentation of your expenses equal to or exceeding your award. *Please note, you will only be reimbursed up to the amount of your award.* Instructions on both methods of accessing your award are detailed below.

(1) INSTRUCTIONS FOR AN ADVANCE:

RECEIVING TRAVEL/RESEARCH FUNDS

Please follow the instructions in your award letter for the date after which funds can be requested. If you require your award before your expenses you **MUST** process an advance request. *Be advised that processing an advance can take up to two weeks through the SSD's Local Business Center so you should bear this in mind when trying to determine when you will receive a check; funds are mailed to the address provided in your travel advance application.*

When requesting a travel advance please complete the following and return by scanned email to Sarah Tuohey at stuobey@uchicago.edu or fax to her attention at 773-834-2000. All forms can be downloaded from the CSRPC website:

- 1. CSRPC Travel Advance form**
- 2. Student Certification for Business Related Travel form***

Please note that, **ideally, your chair or a committee member should sign the Student Certification for Business Related Travel form.*

SETTLING YOUR OPEN ACCOUNT

No later than thirty days after your trip's end date, return original receipts, along with a memo (or worksheet) signed by you, which lists all expenses, to Sarah Tuohey in order to close your account. In addition to your memo and receipts the following must be completed *and return by scanned email to Sarah at stuobey@uchicago.edu or faxed to her attention at 773-834-2000.* All forms can be downloaded from the CSRPC website:

- 1. UChicago Travel Expense Voucher**
- 2. UChicago Travel Expense Worksheet**
- 3. Student Certification for Business Related Travel form**
- 4. Submit your report detailing how your award was used to facilitate aspects of your proposed project.**

The memo should include name of student, department name of the student, home/remit to address, email address, the dates of the trip, the business purpose and the funding source, whether the student

is clearing an advance or submitting for a reimbursement and the memo must be signed. If clearing an advance include your encumbrance number in the memo.

The receipts should be taped (not stapled) to one side of one or more 8.5" x 11" sheets of paper. The receipts must not overlap or obscure one another. Please also attach the award email/letter that the funding source sent to you.

It also helps if you organize your receipts into Categories: Private car mileage (Print out a MapQuest or Google map as "proof" of mileage); Rental car; Transportation; Parking, tolls, etc.; Taxi fares; Hotel; Meals; Business telephone; and Other

Please see the "common vagaries" section below for questions about reconciling your advance.

If the traveler does not clear up the advance within the slated time frame the money will be reported to the IRS as personal income, and they will be taxed on the funds. The traveler will also never be able to receive an advance from the University again.

(2) INSTRUCTIONS FOR A REIMBURSEMENT:

SETTING TRIP DATES

Please provide Sarah Tuohey, at CSRPC, with a travel proposal with your budget and the proposed start and end dates of your research trip. These dates determine when receipts need to be collected. If your travel plans have changed, please notify Sarah immediately. She can be reached via email (stuohey@uchicago.edu) or by phone 773-702-2365. If you intend to use your award for other research related expenses please confirm that the funds can be used for this purpose.

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No later than thirty days after your trip's end date, return original receipts, along with a memo (or worksheet) signed by you, which lists all expenses, to Sarah Tuohey in order to close your account. In addition to your memo and receipts the following must be completed **and return by scanned email to Sarah at stuohey@uchicago.edu or faxed to her attention at 773-834-2000**. All forms can be downloaded from the CSRPC website:

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- 4. Submit your report detailing how your award was used to facilitate aspects of your proposed project.**

**Please note that, ideally, your chair or a committee member should sign the Student Certification for Business Related Travel form.*

The memo should include name of student, department name of the student, home/remit to address, email address, the dates of the trip, the business purpose and the funding source, whether the student is clearing an advance or submitting for a reimbursement and the memo must be signed. The receipts

included should be up to the amount you were awarded; anything over that will not be reimbursed.

The receipts should be taped (not stapled) to one side of one or more 8.5" x 11" sheets of paper. The receipts must not overlap or obscure one another. Please also attach the award email/letter that the funding source sent to you.

It also helps if you organize your receipts into Categories: Private car mileage (Print out a MapQuest or Google map as "proof" of mileage); Rental car; Transportation; Parking, tolls, etc.; Taxi fares; Hotel; Meals; Business telephone; and Other

THE COMMON VAGARIES OF TRAVEL CAN BE RESOLVED AS FOLLOWS:

- a. Airline or Car Rental Receipts: Original receipts may be requested from the airline at time of check-in. Travel agent itineraries/invoices and e-tickets are acceptable but must indicate: the traveler's name, flight numbers, air carrier, class of service, destination(s), date, and an airline ticket number, and that the ticket was paid by credit card or shows a "balance due" of zero.
N. B.: The University is insured for car rentals in the U. S. and will not reimburse additional coverage.
- b. Hotel receipts: Itemized invoice required; must show a balance due of zero.
Subleases: Only allowable for **international** travel. Provide an invoice or a memo which indicates the amount paid, the duration of stay, and the signature of the property owner. **Domestic subleases are NOT reimbursable** and can only be paid for **directly by the University**.
- c. Mileage reimbursement: May not exceed standard coach airfare; a comparison quote for standard coach airfare must have been obtained by and submitted for comparison. Provide exact dates and destinations, including an Internet map showing travel route and mileage.
- d. Lost Receipts: In the signed memo explain the loss and state that you have not and will not seek reimbursement from another source. For car rentals and plane tickets, include the itinerary/invoice if possible; otherwise indicate trip dates, destination, and costs in your letter.
- e. No Receipt Issued: The Comptroller will reimburse you for minor expenses under \$75, such as turnpike tolls, buses, small copy jobs, and small meals, for which receipts were not issued. (**One exception: business meals with other individuals must have receipts.**) Keep a running list of these expenses, including date, amount, and place. At trip's end, submit a signed and itemized expense list to Sarah Tuohey.