

## TRAVEL REIMBURSEMENT PROCESS FOR SAMSI POSTDOCS

Reasonable funding for conferences may be available, especially if you are presenting at a workshop or conference. Please check well in advance with the Directorate for approval. The steps below will guide you through the approval and reimbursement process.

1. The first step is to submit your travel support request *in writing* to the Directorate ([dir@samsi.info](mailto:dir@samsi.info)) for approval. Please copy Rita on your email requests as well ([rita@samsi.info](mailto:rita@samsi.info)).

In your email request, please include the following information:

- a) Name of the conference (also include dates and location of conference); b) amount of your anticipated travel expenses (please itemize the expenses); c) indicate whether you will be making a presentation at the conference.
2. Once you have received Directorate approval for the travel support, if you are a North Carolina State University employee, you will have an extra step.

**If you are NOT, move ahead to Step 3.**

**If you ARE, please go online to the NC state system for Travel Authorization through My Pack Portal. This should be done well in advance of your trip. N.C. State is strict about this.**

**Even if you are traveling to a SAMSI-sponsored workshop, and you are a NCSU employee, you will need to go through the NCSU My Pack Portal.**

3. During the trip, please keep all receipts. If the trip is an international one, please indicate the currency for each of your expenses when you submit your receipts for reimbursement.

For flights: all universities will require the flight itinerary, along with proof of purchase (which includes last 4 digits of credit card on paperwork), and boarding passes if you have them. You must use U.S. air carriers.

Lodging/hotel receipts must show a balance of \$0. Also, we cannot reimburse for movies, laundry, telephone calls, or other expenses charged to the room. Room service or meals charged to the room must also include an itemized receipt.

We will also need receipts for taxis and shuttles, etc.

Please provide a copy of the agenda, schedule, or itinerary of the event that you attended. (This information helps show the business purpose of the trip).

If you are a Duke employee, please submit your itemized meal receipts. Accounting requirements for meal receipts: 1) meal receipts must show all items included in the meal expense as well as the amount; otherwise, we will be unable to reimburse you for that meal, as we must show proof that there was no alcohol expense included with the meal expense. 2) Also, if you have alcohol with your meal, a separate ticket for the alcohol is required so that it is not reflected on receipts that you submit for reimbursement. Alcoholic beverages cannot be reimbursed from federal grants or contracts, so if your meal receipt includes alcohol, we will not be able to reimburse you for that meal, unfortunately. Duke's rule is that any meal receipt that includes alcohol cannot be charged against a Federal grant at all, even if we are excluding the alcohol portion from the reimbursement request.)

Included at the end of this are examples of what an itemized DOES and DOES NOT look like! If there is more than 1 guest on a bill, we need for you to indicate which food items are for you only!!

If you are a UNC or NCSU employee you will not need to submit meal receipts – meal per diems are used instead. However, given the quickly-changing climate of compliance rules and regulations, this could change; so it might be a good practice to hold onto your meal receipts until after you have received your reimbursement for that trip (just in case you are asked to produce those for accounting).

Also, if breakfast, lunch or dinner is provided by the workshop or conference, please let us know so that you are not inadvertently reimbursed twice for that meal. (This is particularly important if you are a UNC or NCSU employee claiming meal per diems in lieu of meal receipts.)

4. When you return from your trip, please submit your **original** receipts to Rita Fortune along with your trip summary, which should include amounts, and other pertinent information. An example of a trip summary is also included. Please do not email those, as original receipts are required.
5. After you submit your receipts, please allow 3-6 weeks for the reimbursement process. The turnaround time is sometimes much quicker than this, but a good rule of thumb is to allow 3-6 weeks for the reimbursement check to reach you.

**HERE IS AN EXAMPLE OF THE ITEMIZATION TO BE INCLUDED WITH YOUR ORGANIZED RECEIPTS WHEN YOU SUBMIT THESE TO RITA:**

*This is important. It streamlines the process. If you do not provide this, we will ask you to do so.*

Begin by including your name, as well as the conference information (name of conference, location, and dates of conference)

Follow with the detailed list for your receipts. Here is a model to use:

<u>Expense type</u>	<u>Amount</u>	<u>Currency (if travel is outside of U.S.)</u>
Conference Registration		
Airfare		
Hotel		
Ground Transportation: <i>(please remember to include the business purpose of the expense – for example “From Hotel to Conference Site”)</i>		
Ground Transportation		
Meal: Breakfast **		
Meal: Lunch **		
Meal: Dinner **		

NOTES / COMMENTS::

**\*\* Keep in mind that if you are employed through NCSU or UNC, you will NOT need to keep itemized meal receipts. If you are employed through Duke, you WILL need to do so. For Duke folks, you will also need to put any alcohol-related expenses on a separate ticket.**

This is an itemized meal receipt!

# Crabapples

NEIGHBORHOOD GRILL & BAR

08 / 14 / 09

3:11 PM

SERVER: ANNIE

TABLE: 39

CHK 7963

CLAM CHOWDER BOWL	8.75
MOZZ STIX	12.99
3 SUPER LUNCH COMBO	40.72
UNSWT ICED TEA	5.75
2 FTN SODA	9.50

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Entry Mode: Swiped  
Card Number: XXXXXXXXXXXXXXX6810  
Card Expire: XX/XX  
Card Type: AMEX

**Subtotal:** \$77.71

Tax: 7.68

Amount due: \$85.39

Tip \_\_\_\_\_

Total \_\_\_\_\_

Remember to include your tip amount paid, and the final total of the meal expense

**This is NOT an itemized meal receipt!**

YOUR RECEIPT  
THANK YOU

06/26/2017 9:58PM 01  
000000#5945 CLERK01

DEPT. 01	T   \$13.95
DEPT. 01	T   \$6.95
DEPT. 01	T   \$6.95
DEPT. 01	T   \$12.95
DEPT. 01	T   \$3.00
DEPT. 01	T   \$3.00
MDSE ST	\$46.80
TAX1	\$3.63

ITEMS 60  
CASH \$50.43

*All meal items reference "Dept. 01" rather than providing the name of the meal item. If you are handed a ticket like this, please ask your waitperson to provide a detailed sales ticket that provides the detailed summary of each menu item on the bill, along with the amount of each item, the total. It should, of course, also show: that the meal ticket was paid, the time and date of your meal, and the restaurant name.*