Welcome to the Research Foundation Travel Training Seminar

Fall 2017
Research Foundation
Travel

➢ Agenda

➢ Travel Overview
➢ CTA
➢ Car Rental
➢ Reimbursement Allowances
➢ Per Diem Rates
➢ Forms
➢ IRS Mileage
➢ Travel Reminders
Travel Overview

➢ The Travel Office is responsible for processing travel reimbursements to Stony Brook Faculty, Staff and Students.

➢ Reimbursements are processed in an efficient manner with regard to the rules and regulations of the Research Foundation of State University of New York.

➢ All Travel on Sponsored Funds requires the approval of Office of Grants Management

➢ Special Approval: In compliance with the President’s Reduction Plan, Travel funded by IDC and Royalty accounts must have the written approval of the appropriate area Dean or VP.
Virginia Travel Account

➢ Program available to RF business travel.
➢ Agreement between NYS and Citibank.
➢ No “card” issued to individual.
➢ No out of pocket expense for traveler to purchase air/rail tickets.
➢ Call Euro Lloyd Travel, the designated agency at 2-7799 for quote on required air/rail tickets, using the contracted NYS City Pair Rates if applicable.
➢ Prepare a RF requisition, attaching the quoted itinerary and have it approved by the Office of Grants Management for funds availability and appropriateness.
➢ Upon approval, send requisition to Procurement Office, who will place ticket order with Euro Lloyd Travel.
➢ Traveler’s PATEO will be charged and will appear on monthly accounting report. Both travel dates and ticket purchase must be within the award period.
➢ Use with Research Foundation funds only.
Car Rental

- RF has established a service agreement with Enterprise based on the NYS contract for passenger vehicle rentals within New York State and the United States.
- Use Stony Brook corporate code JN0645 to book by phone or online @ www.enterprise.com.
- Travelers should not purchase Loss Damage Waiver (LDW) or Collision Damage Waiver (CDW) when using Enterprise.
- Travelers should only purchase Loss Damage Waiver (LDW) or Collision Damage Waiver (CDW) for non-contract vendors.
- Any other types of insurance are not reimbursable.
- Present Tax Exempt Certificate AC-946 and ST 119.1 for all NYS rentals.
- These are available on the Procurement website.

http://www.stonybrook.edu/procurement/employees/travel/car_rentals.shtml
Unreceipted Method – Method I

- Flat rate allowance for lodging, meals and incidentals when traveler stays with a relative or friend.

- Rates are established based on the city where lodging is obtained or the area of assignment (whichever is less).

- [http://www.osc.state.ny.us/agencies/travel/method1.htm](http://www.osc.state.ny.us/agencies/travel/method1.htm)
Method 2 - Travel Per Diem Rates

- **Domestic**
  - [http://www.gsa.gov/perdiemrate](http://www.gsa.gov/perdiemrate)

- **How to Calculate Meal Breakdown**

- **Foreign**
  - [https://aoprals.state.gov/web920/per_diem.asp](https://aoprals.state.gov/web920/per_diem.asp)
Day Trip Reimbursement

Travelers without meal receipts are reimbursed $5.00 for breakfast and $12.00 for dinner.

Travelers with meal receipts are reimbursed up to the maximum amount of the meal per diem allowance for the particular area of travel.

All day trip meal reimbursements are reportable as income to the IRS.
FORMS: Travel Reimbursement/Advance Request

➢ For RF Employee Reimbursement use Travel Form
  • Travel Voucher Form:
    • http://www.asa.stonybrook.edu/asa/asaforms/Department/PROC/Document/PROC0066
    • Travel Voucher Form Instructions:
      • http://www.asa.stonybrook.edu/asa/asaforms/Department/PROC/Document/PROC0066

➢ For Research Travel Advance use the Requisition Form
  • Requisition Form and Instructions
    • http://www.asa.stonybrook.edu/asa/ASAForms/Department/PROC/Document/PROC0065
Research Foundation Travel

2017 IRS MILEAGE RATE

- Current rate is .535 cents per mile.

- Rate covers operating cost of vehicle such as maintenance and repairs, gasoline, oil and insurance.

- In the event of an accident while traveling on RF business the underlying liability coverage, the insurance carried by the owner on the personally owned vehicle becomes primary for the payment of claims. After all valid automobile insurance coverage has been exhausted; the Research Foundation’s non-owned automobile insurance policy will cover the amount of any valid claim that exceeds the underlying policies.
Research Foundation Travel

- **Rental Vehicle vs Personal Vehicle, Which is More Cost Effective?**
- When traveling on behalf of Stony Brook University, travel should be by the **most efficient and cost-effective method** of transportation available in the best interest of the University.

- The Office of General Services (OGS) has Rental Vehicle agreements with Enterprise and Hertz. To assist travelers in determining the most cost effective method of transportation, “Trip Calculators” can be located at: [http://www.ogs.ny.gov/bu/ss/trav/calculators.asp](http://www.ogs.ny.gov/bu/ss/trav/calculators.asp)

- Supervisors should review travelers’ itineraries in advance to ensure that the most economical method of travel is used, and Trip Calculation form should be attached.

- When supported by proper justification, **personal vehicles** may be used when common carrier or rental vehicle transportation is not available or cost effective. The justification, submitted with supervisor approval, must clearly state as to why the use of the personal vehicle was the most cost effective option. Mileage will be reimbursed in accordance with the current standard IRS Mileage rate.
Travel Reimbursement Reminders

- Original receipts are required for all travel reimbursements. Personal credit card statements alone are not an acceptable form of payment since they do not provide transaction details.
- Submit original passenger receipt or E-ticket with itinerary and proof of payment.
- NYS sales tax is not reimbursable. Submit a tax exempt form to vendor for lodging, car rentals and all other travel related expenses.
- Over the maximum justification is required when lodging exceeds the allowable per diem rate, and be approved by supervisor. The hotel rate will automatically be adjusted to the government rate without a justification.
➢ **Travel Reimbursement Reminders cont’d**

➢ Registration fees require a registration form and proof of payment.

➢ Attach a program or brochure indicating conference dates, location and agenda.

➢ If meals are provided by the conference, travelers cannot claim the meal per diem unless there are medical/religious reasons.

➢ Business call justification should include purpose and party called. A traveler is allowed one personal call per day not to exceed $5.00.

➢ Travel Insurance on IDC accounts is not an allowable expense.
Travel Reimbursement Reminders cont’d

When personal vehicles are used for travel in lieu of a common carrier the traveler must provide a justification. The justification submitted with supervisor approval must clearly state as to why the use of a personal vehicle was the most cost effective option.

Justification for additional expenses related to airline travel such as excess baggage fees, and airline change fees will be required for reimbursement.

Include a telephone number or email address where a contact person can be reached should the Travel Office have questions.
Contact Names & Numbers

➢ Christine Wilson ..... 2-6433
➢ Porshia Russell ......2-6019
➢ Joy Murphy .......... 2-6004
➢ Angela Fink .......... 2-6003
➢ Nicola DeMeo ........2-2114
Research Foundation Travel

Questions?

Thank you for attending