

# Instructions for Reimbursements

## MEAL REIMBURSEMENTS:

- ❖ The **Request for Meal Reimbursement** form needs to be completed with signature and **itemized receipts** showing \$0 balance due attached.
- ❖ The “Alcohol” OR “Food Only” box (located in the upper right corner of the form) must be checked before the reimbursement form is submitted for processing.
- ❖ All participants must be listed on the form. If additional space is needed, please attach a separate document.
- ❖ Meal Reimbursement requests should be taken to Marcus Bullett for processing or placed in his mail box.

## PERSONAL REIMBURSEMENTS:

- ❖ The **Request for Personal Reimbursement** form should be completed with signature and **itemized receipts** showing \$0 balance due attached.
- ❖ The “Pre-Travel Expenses” OR “Other Expenses” box (located in the upper right corner of the form) must be checked before the reimbursement form is submitted for processing.
- ❖ Personal Reimbursement requests should be taken to Marcus Bullett or Lauren Williamson for processing or placed in their mail box.

## PRE-TRAVEL EXPENDITURES:

- ❖ To receive reimbursement for expenses prior to the actual dates of travel (airfare, conference registration, etc.) complete the **Request for Personal Reimbursement** form.
- ❖ Signature and **itemized receipts** showing \$0 balance due must be attached.
- ❖ Students should have their supervisor sign their reimbursement forms.
- ❖ Reimbursement requests should be taken to Marcus Bullett or Lauren Williamson for processing or placed in their mail box.
- ❖ *NOTE: Pre-travel expenses that are submitted for reimbursement within 5 business days of the trip will NOT be processed. Please include these expenses on the Post Travel Reimbursement Form that you will complete upon your return.*

## POST TRAVEL REIMBURSEMENT:

- ❖ The **Request for Post Travel Reimbursement** form **MUST** be signed and completed with **itemized receipts** showing \$0 balance due attached.
- ❖ All fields are required to be filled out on this form.
- ❖ Conference agendas, itineraries, website printouts, etc. need to be submitted along with your receipts.
- ❖ Expenses that have been pre-paid should NOT be included in your request.
- ❖ Meals will be reimbursed at the standard per diem rate in place at the time of travel.
- ❖ Mileage will be reimbursed at the prevailing rate in place at the time of travel.
- ❖ Unique circumstances involving your travel reimbursement **MUST** be documented and discussed with Finance or Research staff.
- ❖ Post Travel Reimbursement requests should be brought to Marcus Bullett or Lauren Williamson in a sealed envelope for processing or placed in their mail box. Please tape down small receipts (w/o covering printed information) to ensure all materials stay together.

## **NOTE: To ensure processing runs smoothly/quickly, please review the following prior to submitting the form:**

- ❖ Discuss all unusual or unique circumstances with Finance team as soon as possible. Be sure to document this via email or on a separate sheet of paper.
- ❖ Make sure all personal information is completed and project numbers and/or descriptions are included.
- ❖ Make sure the required **itemized receipts** and/or appropriate supporting documentation are attached.
- ❖ Tape down all receipts that are smaller than letter size paper; the tape should NOT cover any words. Avoid using staples. Receipts are copied/scanned by the department and university accounting offices; therefore, documents should be able to go through a scanner/copier smoothly. All forms should have Claimant’s signature.

FOR ASSISTANCE, PLEASE CONTACT

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