

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.
- ❖ Meeting agenda and business purpose are required.
- ❖ 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 emailed to Bianca Snell for processing.

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 emailed to Bianca Snell (Gifts), Lauren Williamson (State/Startup), or Donna Richards (Grants/Research) for processing.

POST TRAVEL REIMBURSEMENT:

- ❖ You **MUST** have an approved paper AP-104 (upload to TR) or TA in the system prior to incurring any travel expenses.
- ❖ 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.
- ❖ If foreign currency was used, you **MUST** provide either an OANDA currency converter pdf or redacted credit card statement.
- ❖ 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 emailed to Bianca Snell, Lauren Williamson, or Donna Richards as outlined above for processing.

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

- ❖ Discuss all unusual or unique circumstances with Finance/Research 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 all bank accounts, credit card numbers, social security numbers, etc. are redacted from documents.
- ❖ Make sure the required **itemized receipts** and/or appropriate supporting documentation are attached.

FOR ASSISTANCE, PLEASE CONTACT

Donna Richards (Phone: 513-7300 Email: djricha5@ncsu.edu) for 5 accounts

Terri Moss (Phone: 515-2930 Email: tmarti4@ncsu.edu) for non 5 accounts