SSW PhD Student Travel Instructions

SSW Business Office / contact Dan Boyle with questions:
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These instructions are for reimbursement for PhD student travel expenses for approved conference presentations supported by the SSW PhD program each year. The maximum dollar amount is $1,000 per year per student (June 30-July 1).

You **must submit a travel request form** (see attached) to Dr. Zippay to obtain approval for reimbursable travel in advance. The best practice once you have the form approved is to work with a Rutgers travel vendor and the SSW Business Office to have items pre-paid on your behalf. The major items the business office can **prepay** are **airline, hotel, and conference registration fees**. It is important than you contact the Rutgers travel vendor and business office **one month prior to travel** as this allows time to process all the items.

Instructions for pre-paying travel through Rutgers travel agent

Air, Rail and Bus pre-paid travel

1. Students: email the Rutgers travel agency and let them know the dates you want to travel. You can choose any one of the Rutgers travel vendors you prefer. We have traditionally used Kreigner Travel. Here is the link where the vendors are listed at the bottom of the page https://procurementservices.rutgers.edu/purchasing/travel-agencies
If you want them to book a flight/rail that you have found online make sure to provide the details in the email. Otherwise, they will find a flight for you.

2. The travel agent will return flight/rail information and prices to you. If you are in agreement with the information and the price, forward the email to Rafaelina Rodriguez-Jaquez in the SSW Business Office rr1007@ssw.rutgers.edu. In the **subject line of the email please state "PhD travel"**. The Business Office will have your travel order prepared and authorized.

3. You will receive an email with your electronic tickets.

Hotel pre-paid travel

1. Most hotels will not accept a purchase order - therefore we ask that you book the hotel using a credit card to hold the room. Have the hotel send you a quote for the room.

2. Send Lina in the Business Office your hotel quote along with the travel approval from Dr. Zippay. Please remember the subject line should state PhD travel. We will have a check sent to the hotel and the hold on your card is released. We may need to obtain a W9 from a hotel in order to add them to our vendor system
- That is something the Business Office will take care of.

3. If you use Airbnb or an online vendor such as Expedia we will not be able to reimburse you until after you return from the trip via the expense management system.

Conference registration pre-paid

1. For conference registration please send the registration, fee page, and travel approval from Dr. Zippay to Lina in the Business Office. We will have a check sent to the conference on your behalf

2. If the conference registration <u>must</u> be done via credit card, make an appointment with the Business Office. Please be advised if you do not have an appointment or if the conference <u>can be</u> processed with a check, then the Business Office will not process the conference fee via a credit card.

The advantages of having us pre-pay expenses

1. Air/Rail are usually some of the more expensive costs associated with the trip; not having to lay out the funds for these could possibly save you interest charges.

2. Having the Business Office pre-pay hotel and conference costs incurs no additional charge

3. Depending on the cost of the flight and hotel, you may not need to file an expense report at all. If you do need to file you may be using a per diem meal rate, which does not require receipts. This will expedite your time filling out an expense report in the expense management portal.

4. IF you do not have the Business office pre-pay, your expenses you will need to wait until you return from your trip for reimbursement. In addition, you will also need to fill out an expense report to receive reimbursement.

<u>Instructions for submitting non-prepaid travel expenses for reimbursement</u>

If you have travel expenses that are not pre-paid, you will need to submit your expenses and receipts via the Rutgers Travel and Expenses Portal. Note that FOOD is reimbursed via a daily per diem (see instructions below).

Navigating to the Travel and Expenses Portal

- Use the Google Chrome browser to navigate to MyRutgers
- Click Login on the upper right hand portion of the screen.
- Enter your NetlD and password.
- Click the fourth tab from the left at the top of the screen, called Cornerstone.
- Click on the Expense Management icon, found in the financial section of the page.

Bank Account Setup

- You must enter bank account information in the system before entering your first expense report. This is a one-time setup required for reimbursement. Whether or not you choose to have the

reimbursements done by direct deposit, you must enter this information.

- Navigate to the Travel and Expenses Portal (instructions above)

- Click Manage Bank Accounts link from the Tasks menu (Tasks icon all the way to the right of the screen (small icon looks like a sheet of paper with three lines)

- Click the + button to enter an account and enter the following
  - Country
  - Account Number
  - Account Type
  - Account Holder (Name)
  - Bank (Name)
  - Routing Number
  - Click the Save and Close button.
  - After new screen with the line item comes up
    - click Done

Constructing an Expense Report

- Navigate to the Travel and Expenses Portal.
  - Click the Actions drop down arrow
- Select Create Expense Report
  - Add purpose.
- Click + under the Expense Items section to add items to the report.

You will need to populate the following fields:

- Date. This is the date of the individual expense

- Template: should always be the default: "Rutgers Business Unit Expense"

- Type — this dictates what other fields must be filled out depending on the category you select. Expense Location o Amount

- Description. This should be as descriptive as possible, including all relevant information Merchant name: the name of the vendor (airline, hotel, etc.)
  - Others, depending on type of expense

- The account code to use on the expense report is:
  - a. Unit   310
  - b. Division   5800
  - c. Organization   4454
  - d. Location   2110
  - e. Fund Type   100
  - f. Business Line   1315

- The expenditure organization is 31058004454

- To add receipts or other attachments, click the plus sign in upper right, next to "Attachments." o Upload a file from your computer— use Choose File button o The name of the file will populate

automatically in the Title field o Enter a description of the receipt in Description field o Click the Save and Create Another button to add more, or Save and Close if done attaching receipts.

- If you are finished adding individual expense items, click the Submit button to submit. To add more expense items, click the plus sign under the Expense Items section to add more items.

- To see where the report is in the automated workflow, open the expense report by clicking on the report number. Once the report opens, click the link next to Status. This shows who is remaining in the approval chain.

Instructions for submitting per diem food expenses:

When requesting Per Diem please go to the following link
https://procurementservices.rutgers.edu/travel-and- expense/reporting-travel-expenses

Select meals per diem options and choose the appropriate option.

A. Please note the following Rutgers reimburses 75% of the per diem value on travel days.
B. In addition, when travelling if you are provided a meal it must be deducted from the per diem request.
C. Rutgers values each meal as follows Breakfast and Lunch are each 20% of the per diem value. Dinner is 60% of the per diem value.
D. As an example if you were requesting per diem, the daily rate was $100.00, and the conference provided breakfast, you are only entitled to $80 for that date.
E. If the per diem rate is $100.00 and you travel home on that date, and no meals are provided you are entitled to $75.00