

Student Travel and Reimbursement Guidelines, Alcohol, and Vacation/Holiday Policies – Appendix B

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Trainee travel applies to the following types of trips: (1) gather data integral to the trainee's research project; (2) attend a scientific conference for the purpose of presenting results of the his/her research project; or (3) attend a scientific conference for the purpose of gaining additional knowledge about his/her research project. However, "trainee travel" **cannot** include travel between UR and the individual's home, and therefore, any relocation/moving costs or commuting costs are regarded as personal, and reimbursement of such costs constitutes additional taxable fellowship dollars.

The following applies to all reimbursement for trainees:

All trainees must calculate and fill out their own reimbursements using the University expense form. If you do not have direct deposit, you will need to request a check to be sent to your medical school box number. Be sure to fill in correct box. Leave "Company", "Spend Category" and "FAO" columns blank. Administrator will fill those in. See example of form in attached pdf. The following link has the current form. Always use the EMPLOYEE expense report (F3), NOT Student expense report. www.rochester.edu/adminfinance/finance/accounts-payable/forms/

This form should then be sent electronically to Alysha Taggart, MSTP Administrator for approval and processing. The exception to this is if your graduate department is contributing funds toward your reimbursement; the form should then go to the Administrator/Accountant in your graduate department. Ask that person to contact Alysha Taggart for the MSTP account number.

All fourth year medical students in the MSTP who are graduating should plan on processing their training funds by end of JANUARY of their graduation year at the very latest. This is necessary in order to avoid last-minute scrambling to process paperwork in the weeks before commencement. It also alleviates the possibility of trainee being terminated prior to getting reimbursed. Reimbursements turned in after January 31 will not be processed.

Documentation

Original receipts will be required for all expense reimbursement items other than reasonable cash tips. Reimbursement for such costs (to the extent otherwise permitted by policy) will be made to the individual trainee after the trip. **Finance requires that all travel reimbursement requests must be submitted within 60 days of when the actual expense was incurred.**

- Alcohol must be on a separate receipt
- Tips should not exceed 18%
- Credit Card or Bank Statements must be provided to show proof of purchase if no receipt is included
A "snapshot" of the expense is acceptable

Expenses

Although the University has recently instituted a per diem option, MSTP students must request payment based on actual incurred cost and include all receipts.

Except for the conference registration fee and special airline ticket requisition procedures referenced below, trainees will be responsible for travel expenses incurred in connection with their trainee travel.

Third Party Payments

Trainees should not pay costs on behalf of other individuals and expect to be reimbursed for the costs of those other individuals. **This rule applies to other MSTP students attending the same meal. ALWAYS request separate checks.**

Phone Calls

Cost of phone calls made by a trainee while in trainee travel status would not normally be allowable unless the trainee can document that the call was directly related to his/her traineeship project.

Conference Registration Fees

Conference registration fees for the trainee are normally paid directly by the trainee then reimbursed after the trip. In rare circumstances, advances can be processed by MSTP administration. Social/recreational activities associated with a business conference are not normally reimbursable.

Parking/Tolls

With receipts to document the expenditures, actual parking and toll charges directly associated with trainee travel may be reimbursed.

Mileage

Reimbursements for private car mileage must be based upon the IRS federal mileage rates. The private car mileage rate does not apply to rental cars or to UR-owned vehicles.

Rental Cars

Renting automobiles may be allowed for UR trainee travel purposes if public transportation is not available or is impractical to utilize. The original detailed receipt/agreement must be attached to the reimbursement request. In such cases, the traveler will not be reimbursed for the mileage allowance. However, if gas tank is filled by traveler prior to returning car to rental facility, UR will reimburse for that.

If attending the annual MD/PhD Student Conference in Colorado, you must rent as soon as you plan to go. **Rental agencies sell out in Denver, especially in July when the Conference is held so book EARLY!** The least costly available vehicle which holds the most students should be rented (an SUV is ideal or something with lots of room for suitcases and bodies). If not possible, then get a smaller vehicle in addition to the larger. When a more costly rental car is reserved, justification must be included in order to be reimbursed.

Rental Car Insurance

Automobile rental companies usually offer renters the option of purchasing various types of liability and physical damage insurance to address situations in which the rental car is involved in an accident or in which the rental car is stolen or vandalized. Whether a trainee would be reimbursed by UR for such insurance depends upon: (1) whether the car is being rented strictly for UR trainee travel purpose and (2) whether the travel is occurring inside the United States vs outside the United States. Domestic travelers on UR business are protected by special travel insurance and thus should not buy the extra accident or collision insurance offered by rental car agencies. The cost of this insurance will NOT be reimbursed. International travelers SHOULD buy the extra accident/collision insurance as they are not protected under the UR special travel insurance. The cost of this insurance WILL be reimbursable.

Airline Tickets

Airline tickets should be purchased as soon as a trip is planned in order to get the best fare. Advance airline tickets can be purchased thru Town & Country Travel but must be at least 30 days prior to the trip and an F2 form (Request for Advance Travel Tickets) must be completed and signed by both the individual traveler as well as their supervisor. This must then be faxed to Town & Country Travel **before the reservation will be confirmed.**

Transportation

First/business class airfare/transportation is generally unallowable for trainees, unless a legitimate medical justification is documented.

Taxi/Uber/Lyft/Other Rideshare

Request for reimbursement of taxi/rideshare fares should only be made when the taxi/rideshare trip was necessary for official UR trainee travel purposes and when more economical forms of public transportation were unavailable or impractical. For example, free or lower cost airport shuttle vans should be used if possible, and taxis/rideshares to/from meals would not normally be considered necessary if meal service was available in the traveler's hotel or within walking distance. Though documentation is not routinely required, trainees should be prepared to provide justification for the necessity and reasonableness of taxi/rideshare fares if requested by the traveler's department, central administration, or auditors. Receipts for reimbursable taxi/rideshare fares should be obtained and submitted with the trainee's reimbursement request. In addition, the traveler should list each taxi/rideshare trip on the travel voucher with a brief description of the purpose of the trip (e.g. "taxi/rideshare from airport to hotel", "taxi/rideshare from hotel to meeting", etc.). If a trainee pays the taxi/rideshare fare for multiple persons, the documentation should also include a notation specifying everyone who was covered by that fare and the payment request numbers of those individuals, if applicable.

Meals

Receipts are required to document all meal expenditures for which the trainee is requesting reimbursement. **Itemized** receipts are required for reimbursement of a meal regardless of the dollar amount. Alcohol cannot be present on meal receipts. If alcohol is present, then a new meal receipt must be issued or the total amount needs to be deducted from the trainee reimbursement.

Allowable Meal Thresholds:

- Breakfast \$25.00
- Lunch \$25.00
- Dinner \$50.00

Medical Scientist Training Program Alcohol Policy:

Trainees **cannot** be reimbursed for alcoholic beverages or alcohol-related costs under any circumstance unless pre-approved by the MSTP Director.

The MSTP will **not** reimburse students for alcoholic beverages consumed at regular applicant interview dinners or other events outside the University unless pre-approved by the MSTP Director. Candidates at or above the age of 21 may consume one alcoholic beverage, and the Program will fund this; however more than this amount is discouraged and will not be funded. It is the moral and legal responsibility of students who attend the dinners to adhere to this policy. A separate invoice specifying alcoholic beverages consumed by candidates, as well as a dinner invoice must be given to the MSTP Administrator for reimbursement.

The Medical Scientist Training Program will provide alcohol at certain MSTP-sponsored special social events throughout the year such as the applicant Revisit dinner.

Medical School Alcohol Policy (from SMD Student Handbook):

In the Medical Center and at all of its off-site locations, the non-patient use of alcoholic beverages is limited to events held at sites which occur outside patient care areas. These events and the use of alcohol, must be approved by the Office of the Senior Vice President for Health Affairs, catered by a catering service approved by the UR Sanitarian from Environmental Health and Safety, and holds a current liquor license, as well as liquor liability insurance approved by the Office of Counsel to the Medical Center

New York State Law: NY law prohibits the serving of alcohol to individuals actually or apparently under the age of 21, to intoxicated individuals or individuals who are known to habitually become intoxicated. It is illegal for individuals under the age of 21 to possess alcoholic beverages with the intent to consume such beverages.

Conference/Seminar Meals

When a trainee's meal is included in his/her conference/seminar registration fee, no additional reimbursement for that meal is allowable. Please review the conference agenda for included meals.

Lodging

The cost of the trainee's hotel room is normally reimbursable at the basic single occupancy room rate (plus tax). Almost all hotels accept a credit card number to guarantee a reservation and will only charge the card if the traveler fails to arrive on time without properly canceling the reservation. Therefore, trainees are expected to handle the room reservations with a credit card. Faculty and departments can reserve and pay for a trainee's hotel room with proper documentation provided at the time of reimbursement. Lodging outside of acceptable hotels needs to be approved prior to a reservation (e.g., apartments, houses, etc.).

Unallowable Costs

It is impossible to compile an all-inclusive list of costs which will not be reimbursed by UR, so when considering whether or not to make an expenditure while in travel status, the trainee should first assume that a cost will not be reimbursed unless the official Expenditure Guidelines clearly state that it is allowable for trainee travel. Unallowable costs should never be included on a request for reimbursement of trainee travel costs. Here are some examples of costs which will not be reimbursed by UR:

- Alcoholic beverages
- Clothing
- Credit card interest, finance charges, or penalties
- Family or friend costs
- Gym fees
- Housing outside of allowable lodging
- **Internet Access (WiFi)**
- Laundry services
- Life insurance
- Luggage repairs
- Luggage replacement
- Medical and dental expenses
- Movies or videos
- Passports
- Personal phone calls
- Sightseeing or souvenirs
- Shoe repair
- Ticket cancellation insurance
- Toiletry articles
- Traffic tickets or parking fines
- Umbrellas
- Vitamins

Travel and Standard Reimbursements

Reimbursements must be in the computer system within 30 days from the time of the transaction. Reimbursements must equal \$25.00 or more before a payment request will be processed. Turn in all receipts as soon as possible upon your return or when the purchase was made. The documentation required includes the following:

- Flight itinerary indicating total airfare from travel agent/airline
- **Paid by cash:** Original register receipt indicating form of payment.
- **Paid by check:** Copy of an online banking record showing that specific payment circled.
- **Paid by credit card:** The original credit card receipt (showing at least the **name** and **last four digits** of the card used) and a transaction statement.

How will you receive your reimbursement?

Students being reimbursed will receive payment in the form of direct deposit. If a student does not opt for direct deposit, they will receive payment in the form of a check directly to their medical school box number or home address.