

Travel Guidelines

The purpose of this guideline is to define reimbursable travel expenses and the documentation required for submitting state and RF travel vouchers. As an employee traveling on business for the [State of New York](#) and/or the [Research Foundation](#) you are performing a valuable service. At the same time, it is your responsibility to spend this travel money as efficiently and economically as possible. The basic rule to remember is that only **actual, necessary, and reasonable** business related expenses will be reimbursed. ***This list is not all-inclusive***, some travel may require additional information to support the reimbursement request.

[Travel Authorizations](#) are required for anyone traveling on official State (ESF) or Research Foundation business. [OSC Travel rules](#) require prior approval for all trips whether or not reimbursement will occur. Travel Authorizations should be submitted to the Travel Office **prior to the travel date**. The Travel Authorization is proof that you are traveling on State (ESF) or RF related business and to verify the employee's travel status in the event of accident or death. For International Travel, please check the following sites for any travel updates or contact Office of International Education – oi@esf.edu.

- Center for Disease Control Travel Advice - <https://wwwnc.cdc.gov/travel>
- Department of State Travel Advisories - <https://travel.state.gov/content/travel/en/traveladvisories/traveladvisories.html>

When employees are on assignment at a work location more than 35 miles from both their official station and their home, they are considered to be in [travel status](#) and are eligible for reimbursement of travel expenses in accordance with [NYS](#) and [RF](#) Travel Guidelines.

Original, itemized receipts are required for all expenses, except when claiming meal per diems without the use of the [state travel card](#). [NYS Travel Card](#) expenses must be supported by original, itemized receipts. ***Summary meal receipts will not be reimbursed.*** Without the receipt detail we cannot audit for allowable expenses in accordance with NYS and RF Travel rules.

Reimbursement for travel expenses paid for with personal funds will not be reimbursed until after the trip is completed. The [State of New York](#) and the [Research Foundation](#) both have Corporate Travel Card Programs that provide employees with a mechanism to pay for travel expenses.

Airfare and rental cars can be direct billed to a Research Foundation Award through [BTI](#). BTI is no longer available for direct bill to [state accounts](#).

NYS Sales tax is not reimbursable for state or RF lodging and rental cars. [Using your personal credit card at Enterprise/National/Hertz may require additional paperwork when seeking tax-exemption.](#)

- [New York State](#) has reciprocal agreements with [Florida](#), [Maine](#), [Missouri](#), [New Jersey](#), [North Dakota](#), and [Rhode Island](#) which provides tax exemption for travel related payments.
- [Research Foundation](#) has reciprocal tax agreements with [Florida](#), [Kentucky](#), [New Jersey](#) and [Tennessee](#) which provides tax exemption for travel related payments.

You may use a personal vehicle for official travel when an ESF owned vehicle or common carrier is not available, not cost effective, or otherwise not appropriate. You may also use your personal vehicle for convenience, but you will only be reimbursed for the equivalent of the most cost-effective method of transportation and will be required to provide supporting documentation. [OGS Travel Calculator](#)

Best Practice: Prepare your [cost comparisons](#) before you travel. Recreating scenarios after the fact can be difficult or impossible. For example, if you are choosing to drive AND YOU KNOW FLYING WILL BE CHEAPER, print screen shots of airfare costs when you would have been booking a flight to document what the cost would have been had you chosen to fly. The Travel Office can assist in ensuring you will have the documentation you need to support your request.

State (ESF) and Research Foundation preferred method of travel is ESF owned vehicle or common carrier. Damage to personal vehicles and/or insurance deductibles **are not** reimbursable by either the State (ESF) or the Research Foundation.

Any questions regarding the use of personal vehicles for official business use should be directed to the Travel Office (travel@esf.edu (315) 470-4827) prior to travel.

Purchases for field equipment, services and/or general supplies are not reimbursable through Travel and should not be included on the Travel Voucher. These receipts should be attached to a requisition form and submitted to [Purchasing](#).

Please ensure the following bullet items are included when filling out your travel voucher:

- Account number(s) to be charged
- Last Name & First Name, Middle Initial
- **For RF Travel** – indicate the traveler’s relationship to the Award. If a Volunteer, a Volunteer form is required to be on file with Human Resources.
- Complete home Address of employee
- Departure Date
- Departure Time
- Return Date
- Return Time
- Complete address of destination & county - Please indicate the full address of your destination. This is a requirement of the Office of the State Comptroller on all travel expense vouchers. If staying in a hotel, you may use that address.
- Address that you departed from for your travel. This is an Office of the State Comptroller requirement.
 - If you started your trip from home, you can indicate “Residence” in this box.
 - If you started your trip from campus, you can indicate “Campus” in this box.
 - If you started this trip from an alternative location, please indicate the complete street address.
- **Business Purpose of Travel**
 - Include how the travel relates to the RF Award and/or how the travel benefits the State (ESF).
 - Conference agenda, event schedule, meeting agenda, communications regarding the purpose of travel is required when submitting travel voucher.
- **Lodging:** Include number of days and how much per day. Lodging per diem rates can be found here: <http://www.gsa.gov/portal/category/100120>
 - Attach original itemized lodging bill (showing zero balance due)
 - If lodging was paid by a third party, a lodging “folio report” indicating date/time of arrival and departure should be included.
 - Proof of lodging is required for all over-night meal per diem requests.
 - If the lodging exceeds the per diem rate, justification for staying at a location that exceeds the per diem must be submitted for approval **PRIOR to the trip**. Justification can be made either on the [Travel Authorization](#) or on the [Over the Max](#) form.

- **Transportation Expense** – Airline, Rental cars, personal vehicle mileage, taxi/Lyft/Uber, ferry
 - Original airline itinerary with proof of payment and airfare class.
 - Original boarding passes should be submitted with the travel voucher.
 - Enterprise/National/Hertz car rental receipt.
 - [OGS Travel Calculator](#) or other documentation demonstrating common carrier vs. personal vehicle cost should be submitted with the travel voucher, if you choose to use your own vehicle rather than a more cost effective method.
 - If claiming personal auto mileage, fill out mileage on the travel voucher and attach a [Statement of Auto Travel \(Mileage Form AC 160\)](#).
 - Neither ESF nor Research Foundation reimburses for damage or deductibles when using a personal vehicle for business.
 - Original gasoline receipts for car rental or in lieu of IRS mileage reimbursement (for state only).
 - Original taxi/Lyft/UBER receipts for airport/hotel transportation.

- **Meals:**
 - Trip must be for more 35 miles from campus & home to claim meals and lodging.
 - Provide a breakdown of breakfast and dinner. Please see web pages for the departure, arrival times and breakdowns of the per diem rates:
<http://www.osc.state.ny.us/agencies/travel/meals.htm>
 - Receipts for meals are not needed when requesting overnight per diem rates using either the RF travel card or personal funds. Proof of overnight lodging is required for meal per diem reimbursement.
 - ***If meals were paid with a State corporate card, original itemized receipts are required with your voucher.*** Proof of overnight lodging is required for meal reimbursement.
 - Itemized meal receipts are required if requesting actual cost reimbursement. Proof of overnight lodging is required for meal reimbursement. ***Summary meal receipts will not be reimbursed.*** Without the receipt detail we cannot audit for allowable expenses in accordance with NYS and RF Travel rules.
 - You are not eligible for meals if they are provided by the event you are attending.
 - You may claim [Method 1 – Unreceipted lodging](#) – if you stay with family and friends.
 - Day trip meals are taxable to the employee per IRS Regulations. RF day trip meals require reporting on a [TAXABLE MEAL PAYMENT REQUEST & AUTHORIZATION FORM](#).

- **Miscellaneous Expenses** – any other travel charges relating to the trip.
 - This may include registration fees, tolls, baggage fees, parking fees etc.
 - Tips for bellhops and hotel cleaning staff are included in the meal per diem.

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Forms and links

[NYS Travel Guidelines](#)

[Research Foundation Travel Handbook](#)

[ESF Travel Authorization](#) -

[State Travel Card application](#)

[Research Foundation Travel Card application](#)

[BTI Control Number Request form \(for Research Foundation only\)](#)

[State Employee Report of Travel and Expenses and Claim for Payment](#)

[Research Foundation Travel Expense Voucher](#)

[State Tax Exempt Forms](#)

[Research Tax Exempt Forms](#)

[Overnight lodging and per diem rates](#)

[Over the Max justification and approval form](#)

[OGS Travel Calculator](#)

[State Rental Car instructions](#)

[RF Rental Car instructions](#)

[Mileage Form AC160](#)

[Statement of Corporate Travel Card Charges](#)

[Travel within 35 miles of official workstation and residence](#)

[RF Taxable Day Trip meal reimbursement form](#)