Student Organization Travel Guidelines

Read these guidelines carefully. If you do not follow them explicitly you may have expenses that are not reimbursed.

BEFORE YOU GO:

- ONLY travel expenses authorized through the Travel Funding Allocation Board will be reimbursed. Please submit with your application a copy of your signed Student Organization Travel Funding Request Approval Page.

- Print a hard copy of this packet or obtain one from the office of Student Success in Volker Hall 109.

- Complete and sign the second and third pages of the Packet.
  - You must answer the four questions at the bottom:
    - Yes (the trip is on UAB business),
    - Yes (the trip is at UAB request),
    - No (you are not a state employee), and
    - No (you are not receiving other compensation).
  - If you cannot honestly answer those questions in that way, do not mark an answer but come talk to the Program Manager of Student Success Programs (VH 109A).

- Submit the completed and signed pages to the Office of Student Involvement (VH 109A).

- Collect conference or event registration form(s), flyers/advertisements, itinerary and/or other documentation to be submitted with your reimbursement request.

- Student travel is paid on a reimbursement basis only, and is subject to the policies of the University Accounting office.

- Carefully read the guidelines on pages four and five of this packet before you make any purchases.

- When you return, you must submit completed and signed copies of pages six and seven, and copies of all supporting documentation to the Program Manager of Student Success Programs within 30 days after the trip (VH 109A).

- It may also be necessary to submit a completed and signed W-9. You can download a copy from www.irs.gov
Application for Travel Funding
from UAB SOM Student Success Programs

Date of application ________________

Name ___________________________ Class ____________
Street Address ____________________ City ___________
State ________ Zip ______________

Date of proposed departure _____________________
Date of proposed return ________________________

City and State where event is located _______________________________

Purpose of trip _________________________________________________

Check any that apply

☐ Student Officer / member in local chapter of national organization;
   If so, what organization? ______________________________

☐ Student representing UAB;
☐ Student presenting research or other information at a professional conference;
   If so, what are you presenting? ______________________________

Name of Conference and Organization sponsoring the organization

[ ] Are there additional funding resources for this trip, other than personal finances? _____
   If so, what are they? ______________________________

☐ YES  ☐ No  Is this trip UAB business?
☐ YES  ☐ No  Is this trip at UAB request?
☐ YES  ☐ No  Are you a state employee?
☐ YES  ☐ No  Are you receiving any other compensation for this trip?

Attach a copy of the program (or submit one as soon as it is available).
**Student Travel Statement of Agreement:**

I ______________________________ as a medical student travelling with

   (print name)

financial assistance from the University of Alabama School of Medicine do, by my signature, signal understanding that the School of Medicine is intending to support the educational benefits of this event. The expectation is that I will attend the conference meetings, participate in the conference processes, contribute to the conference aims, and communicate these to my fellow students upon my return.

I understand that any student gaining benefit from this funding (for example a fellow student sharing a car, taxi, hotel room, etc.) does so under the same expectations of the University as listed above.

I have read and understand the policy statement "Students Traveling out of State at UAB expense."

________________________________     __________
   (signature)     (date)

________________________________
   (witness)
General Rules:

- Other than tips, documentation is easiest if you make all purchases by credit card.
- Proof of Payment will be required for each item to be reimbursed. This will mean a copy of a credit card statement showing that a charge posted to the account or a copy of the credit card (with all but the last 4 digits blocked out) that matches the credit card number imprinted on the receipt.
- Be sure the last 4 digits of the credit card number show on all receipts.
- All receipts need to be detailed, not just a total. Most restaurants will provide one receipt with the total showing tip and another receipt that's itemized. It is best if you keep and submit a copy of BOTH.
- The name of the traveler must match the name on the credit card.

Travel (Driving, Flying)

- If traveling with someone who will also be reimbursed, keep your receipts separate whenever possible. This will make the reimbursement process less complicated.
- Fees charged by on-line sites to make hotel and plane reservations may not be reimbursed due to the number of on-line sites that do the same thing for free.
- If private car mileage is being claimed for driving to a conference or event, be sure to include a map (mapquest.com) with mileage to document the distance.
- It is expected that you will travel by the most economical means possible.
- Include the flight itinerary and proof of payment for all airline ticket reimbursement requests. Also include a written explanation if you fly in or out of a location other than the destination city.
- Fees or penalties charged for missing a flight or changing an existing reservation will not be reimbursed without an approved written explanation.
- Keep track of tips paid to baggage handlers, hotel staff, taxi drivers, etc., as these will need to be listed separately on the travel voucher.
Lodging

- “Additional” hotel fees – internet connection, phone calls, etc. – must be necessary for the University, rather than personal purposes. A written explanation will be necessary to qualify for reimbursement.
- The final hotel bill must show the method of payment and a zero balance.

Meals:

- Alcoholic beverages will NOT be reimbursed by UAB SOM. It is best to keep alcohol separate from your meal receipt.
- Separate Checks: Pay for only your own meal, even when traveling with other UAB SOM students.
- Be sure your receipt shows detail of what was ordered and the credit card number shows on the receipt. Most restaurants will provide one receipt with the total showing tip and another receipt that's itemized. It is best if you keep and submit a copy of BOTH.
- A reasonable gratuity is considered to be 10% - 25% of the total bill. Any additional amount will not be reimbursed.
- If breakfast, lunch and dinner are not eaten within a time-frame “reasonable” to the meal, it may be considered a “snack” and may not be reimbursed.
- UAB SOM does not reimburse for “snacks” at any time. Coffee purchased separate from a meal will not be reimbursed, unless it can be associated with a meal.
- If the conference registration fee includes any meal(s) and/or banquet, UAB will not reimburse meals eaten elsewhere during those time frames.
- The maximum reimbursement for Breakfast is $25.00; Lunch is $50.00; Dinner is $75.00.

Entertainment:

- Expenses for entertainment or “sight-seeing” while on the trip will NOT be reimbursed.
Conference and Registration Fees

Name: ____________________________________________

Date: __________________________________________

Name of the Conference: ____________________________________________

Organization Sponsoring the Conference: ________________________________

Conference Location: ________________________________________________

Conference Dates: _____/____/_______  To _____/____/________

List of SOM - UAB Student Attendees:

I hereby certify that the expenses indicated hereon were made in the performance of official UAB business pursuant to the authority granted to me by UAB, and that I have not been and will not be reimbursed for any of these expenses by any other entity.

Signature of Traveler: X___________________________________________

Date: X_____/_____/_________
Volunteer Travel

Name: __________________________ Date: __________________________

Describe the service provided to UAB: ____________________________________________

Points of Travel:

Date: __/__/__ From: __________________________ To: __________________________ Mode: __________________________

Date: __/__/__ From: __________________________ To: __________________________ Mode: __________________________

Transportation:

Private car mileage (not rental cars): _______ miles @ $ _______ per mile (IRS rate) $ _______

Airfare / Train fare (Coach class only - attach stub) $ _______

Rental Car (Attach original receipts & justification why rental car was used) $ _______

Taxi / Van (Include tips - attach original receipts where applicable) $ _______

Parking in home city (Birmingham) $ _______

Parking in visiting city $ _______

Total Transportation $ _______

Meals (Attach original receipts with tips & method of payment included)

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<tr>
<th>Date</th>
<th>Breakfast</th>
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Total Meals $ _______

Hotel Room (Attach original receipts showing method of payment – basic single occupancy room rate only)

$ _______ per night room rate including tax @ _______ nights = $ _______

Miscellaneous (no personal phone calls):

Baggage handling tips (Receipt not required) $ _______

$ _______

$ _______

Total Miscellaneous $ _______

Total Reimbursement Request $ _______

Signature: __________________________ Date: __________________________