



32nd Annual Meeting of the Society for Political Methodology

July 23-25, 2015
Department of Political Science
University of Rochester
Rochester, NY

Travel Expense Reimbursement Instructions for Invited Participants

UC Travel Policy

Partial funding for this event is provided by a National Science Foundation grant to the University of California, Berkeley. Consequently, University of California policies apply to all travel expenses to be reimbursed to invited participants, as described in the attached policy-in-a-nutshell flyer.

STEP 1: Complete and submit a UC Berkeley Substitute W-9 and Supplier Information Form

Individuals who have not received a payment from UC Berkeley in the past 12 months and who will receive the travel reimbursement payment should complete this form. The information you provide will be used to establish your profile in the financial system that will produce your payment. Please provide your name, remit address, and SSN on this form, print, sign, and **fax directly to the number shown at the top of the page** for fast and secure processing. You do not need to complete any other form sections. Data privacy – please do not send via email as this is confidential personal information and our email is not encrypted.

OPTIONAL: Non-U.S. citizens should also complete the **UC Certificate of Foreign Status for Federal Tax Withholding** (UC W-8BEN) form. **Fax this form directly to Meg Garstang** at (510) 643-2673.

STEP 2: Submit a Travel Expense Form

Use the Excel template provided with these instructions to record your eligible trip costs for reimbursement – the amount of your reimbursement is automatically calculated. You may also complete the form by hand. The most important section of this form is your signature on the Traveler's Certification Statement. For fastest processing, scan and **send your signed form and receipts via email directly to Meg Garstang**.

Travel costs up to \$500 will be guaranteed reimbursement – costs in excess of \$500 will be reimbursed based on available award funds for this cost category.

Eligible Expenses - Receipts

Conference registration fees and dorm lodging for students will be prepaid directly to the University of Rochester by UC Berkeley. Receipt requirements are described in detail in the attached policy-in-a-nutshell flyer. Remember to redact your home address and/or credit card number if displayed on any receipt.

Reimbursements to be Paid to Employers

If your travel expense reimbursement will be paid to your employer, an **invoice** on company letterhead and copies of required receipts should be sent to the NSF award administrator. A completed Travel Expense Form is not required in this situation.

NSF Award Administrator

Please don't hesitate to contact the award administrator with your travel-related questions.

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Attachments:

- 1. UC Berkeley Substitute W-9 and Supplier Information (electronic template)*
- 2. UC W-8BEN (electronic template)*
- 3. UC Travel Policy-in-a-Nutshell for Participants*
- 4. Travel Expense Form (electronic template)*

University of California Travel Policy for Participants

Visions in Methodology Conference - hosted at the University of Kentucky
 Summer Methodology Conference – hosted at the University of Rochester
 Improving Spatial Models – hosted at the Massachusetts Institute of Technology
 Undergraduate Mentoring Program

Business Purpose of Your Trip	What you need to do:
<p>All travel supported by University of California, Berkeley funds is governed by <i>UC Business and Finance Bulletin G-28: Travel Regulations</i>. This flyer describes those guidelines that are relevant for participants in conferences and mentoring programs in political methodology supported by a National Science Foundation award to Principal Investigator Kevin Quinn, UC Berkeley School of Law.</p>	<p>Invited participants should cite the title of their event as the business purpose. Participants in the Undergraduate Mentoring Program should provide the name, contact information, and home institution of their mentor.</p>
Air Travel	What you need to do:
<p>Economy/coach airfare can be billed directly to UC Berkeley. Your host or mentor can request this authorization on the participant’s behalf, if such an arrangement is desired. This authorization will allow a participant to work directly with BCD Travel to arrange an acceptable flight itinerary and the cost will be billed directly to the UC Berkeley campus.</p> <p>Avoid purchasing discounted travel packages from other internet vendors unless you can confirm that every item in the package will be itemized separately (airfare, hotel daily room rate, number of nights, and tax/fees, for example).</p> <p>Internet travel packages lacking adequate detail and economy seat upgrades cannot be reimbursed. IRS rulings on these issues prevent the University from making any exceptions, even for hosted guests who might have been unaware of these restrictions.</p> <p>If your actual flight itinerary will include additional destinations for activities not related to one of the conferences listed above, you will need to provide information about a direct itinerary.</p>	<p>If your flight was billed directly to UC Berkeley, you do not need to provide a copy of your flight itinerary - simply note this arrangement on your travel expense report.</p> <p>If you paid for your airfare with personal funds, you’ll need to provide an invoice or itinerary that includes these required elements: 1) name of vendor (person you paid), 2) amount paid, 3) transaction date (when you paid), 4) form of payment (cash, check, credit card), and 5) flight departures and destinations.</p> <p>Higher levels of airline service will be reimbursed at the equivalent refundable economy fare.</p> <p>If you inadvertently purchased an internet travel package that lacks adequate detail, you may be reimbursed for your travel costs via a stipend.</p> <p>Itineraries with multiple destinations - before your departure date, go online to any airline and print an unrestricted economy/coach itinerary for a round trip between your local airport and the destination airport. You will be reimbursed for the equivalent itinerary, or your actual itinerary if it cost less.</p>
Ground Transportation	What you need to do:
<p>Park/Sleep/Fly packages offered by the traveler’s local airport hotels are not eligible for reimbursement as a business-related expense.</p>	<p>Ask the taxi or shuttle driver for a receipt. When no receipts are available, make a note of expenses, including any tips, as you incur them.</p>
Automobile Travel	What you need to do:
<p>If you prefer driving your private automobile to your destination, instead of flying, reimbursement for expenses while in transit will be based on the equivalent refundable economy airfare plus your estimated transportation costs to and from the nearest airport.</p>	<p>Print a page from the airline website showing an equivalent roundtrip coach airfare for your destination and provide the basis for your ground transportation costs with your trip receipts (optional).</p>

When you drive your private automobile, you can be reimbursed for mileage at the current IRS rate of 57.5¢ per mile (as of 1/1/15). You cannot be reimbursed for gasoline purchases or for any roadside assistance if you have car trouble during your trip. The IRS includes these costs in the standard mileage rate.

A mileage “receipt” is the page from any mapping program that shows the number of miles between your point of departure and your destination – double the mileage for a roundtrip. **Provide your vehicle license number and certify that you carry liability insurance** on the Travel Expense Form in order to receive mileage reimbursement.

You should **rent a compact or economy automobile**, unless you have justification and advance approval for renting a larger vehicle.

You can be **reimbursed for gasoline purchases**, but not mileage, when you drive a rental car.

Avoid express check-in. When you return your car, go inside to the counter and pay your bill. This will allow you to obtain the detailed receipt showing charges and payments you’ll need for reimbursement *and* you’ll ensure that the agency doesn’t claim vehicle damage later.

Make sure you always **get receipts for gasoline purchases**.

Lodging, Meals and Incidentals

“Lodging” includes a single-occupancy room rate, along with associated taxes and fees. Sharing your room with a non-business traveler, such as your spouse, does not impact your reimbursement when the single rate is the same as the double-occupancy rate.

When there is a difference in room rates and you have shared your room with a non-business traveler, ask the front desk at check-out to quote the single rate and associated taxes and fees. Make a note directly on your zero-balance receipt – the single rate will be your reimbursement.

What you need to do:

Avoid express check-out at hotels; always check out at the front desk in order to obtain the required **“zero balance” receipt** showing all of your charges and your payment. Express check-out statements are not accepted - you must have a statement that shows the amount and date of your actual payment to the hotel.

Personal services, such as mini-bar use, in-room movies and spa treatments, are not eligible for reimbursement. If these charges appear on your bill, deduct them from the total and make sure you clearly indicate that they are not to be reimbursed as business expenses.

If you need to cancel a hotel reservation, make sure to do this in advance to avoid a penalty and get a cancellation number.

Unless you have a compelling business reason for not having cancelled a hotel reservation in advance, you may find that the penalty fee is not eligible for reimbursement.

Reimbursement for meals and incidentals is capped at \$71 per day. This is not a per diem – you will be reimbursed only for daily actual expenses, up to a maximum of \$71 for domestic trips lasting more than one and less than 29 days.

Domestic trips lasting longer than 29 days are eligible for a per diem. **Trips lasting less than 24 hours** are not eligible for meals and incidentals unless there is an overnight stay.

Always get a cash register or credit card receipt for your food purchases. If a receipt cannot be provided by the vendor, then make a note of your actual expense.

If you submit meal receipts that exceed the daily limit, the online travel reimbursement system will automatically cap your payment at the daily limit.

Overnight stays must be documented with a hotel bill.

“Incidentals” are separate tips and gratuities paid to baggage handlers, porters, bellhops, maids, and such. Meal and taxi tips should be included in the reported costs of those services.

Since there are no receipts associated with incidental expenses, make a note of your reasonable actual costs as you incur them.

Miscellaneous expenses, such as internet fees to connect remotely with the campus, phone calls, and hotel business center charges can be reimbursed. Laundry expenses while traveling can be reimbursed if the trip exceeds six days at your destination.

Whenever possible, get a receipt for the miscellaneous expense and make a note of the business purpose on it. If these expenses are included on your hotel bill, make a note of the business purpose for each cost.