

Guide to Graduate Student Travel Reimbursement

Please apply for all travel awards before you leave. This will help expedite the reimbursement process when you return.

Funding Options:

- 1.) TGS Travel Award up to \$600 (2 award maximum through your academic career)
- 2.) Home Department/Program Travel Awards (e.g. IBiS, MBS, Training Grants)
- 3.) Your PI

Abide by 90-Day Policy (submit all expense reports within 90-Days of travel)

[90 Day Rule Policy and FAQs : Procurement and Payment Services - Northwestern University](#)

Collect ALL itemized receipts for all applicable purchases listed below:

Conference Fees: Registration, Membership, Abstract Fees

Remember to keep your conference badge (this will work as proof of attendance).

A picture of your conference badge is the preferred proof of attendance. If you do not have a conference badge you may submit a conference program that lists your name as a presenter or a certificate of participation.

Flights: Book economy flights

If you do not want to pay for the flight upfront, speak to your department to set up your flight through Key Travel which will be directly charged to one of the chartstrings you would use for your reimbursement.

Hotels/Lodging: You will be reimbursed for reasonable and actual cost of lodging.

Please ask for an itemized receipt at check-out. We need to verify all expenses incurred during your stay including any snacks, room service, etc. (Alcohol is prohibited.)

Please note: there are certain limitations depending on chartstring you will use. For example, IBiS only allows hotel reimbursements in the amount of \$150/night (costs exceeding this amount will be traveler's responsibility or split with another funding source if applicable)

Meals/Incidentals: Itemized receipts will help us verify that everything purchases falls within Northwestern's guidelines i.e. no alcohol, reasonable amounts, etc.

Group Meals: If you split a check, please indicate which items you purchased

IBiS limits meals to \$55/day (costs exceeding this amount will be traveler's responsibility or split with another funding source if applicable).

*Per Diem is also available for food if you are unable to collect itemized receipts

Transportation (Taxi/Uber/Lyft/Train)

Mileage: If you drive your own vehicle, provide a screenshot of Google Maps (or similar) to show miles traveled and you may be reimbursed based on US Federal Government mileage rate.

You may not be reimbursed or may need additional documentation for more than 300 miles traveled.

FAQs

What if I don't have all itemized receipts? (e.g. Taxi driver doesn't have one)

If this happens, please provide a bank statement or credit card statement detailing the expense. Highlight the charge (cross out your account info).

If the expense exceeds \$40, this expense may not be eligible for reimbursement.

TGS will not reimburse without itemized receipts or per diem.

What if part of my trip is personal?

Provide flight/hotel cost comparison prior to departure date. We need to know if there is a difference in flight/hotel costs from the time you left for personal travel vs. if you were to fly/stay only during conference time.

If not provided, may not be able to reimburse the flight/hotel.

Per Diem will not be provided for personal travel days

When You Return...

Feel free to drop off all documents listed above to Life Sciences Financial Office (Hogan Hall 2-150s) or scan as PDF and email to life-sciences@northwestern.edu

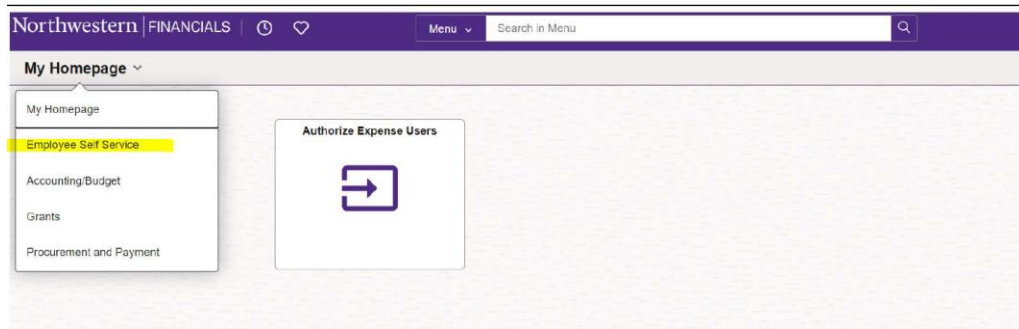
* Please include chartstrings for all travel awards received.

We will create an expense report on your behalf and will send you an email when your report has been submitted.

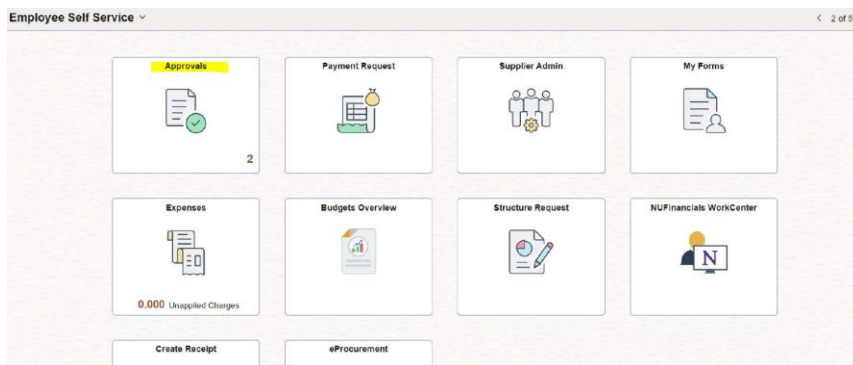
You will then need to log into NU Financials to approve your report.

From your homepage, click on dropdown menu select "Employee Self Service" > select "Approvals" block > select your expense report > click on "Approve"

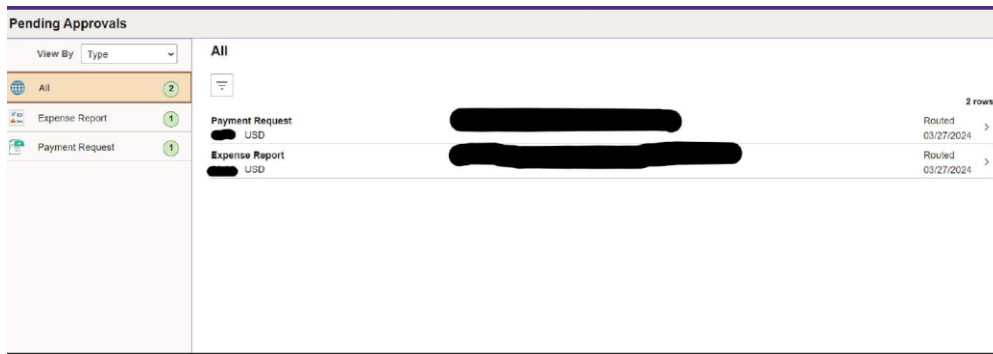
Step 1: Sign into NU Financials and select dropdown menu. Click “Employee Self Service”



Step 2: Select “Approvals” block.



Step 3: Select your expense report.



Step 4: Approve report.

Payment Request

USD

1 line(s) are pending your approval

Summary

Request ID		Business Unit	NWUNV
Invoice Number		Invoice Date	
Supplier ID		Entered By	
Supplier		Description	

[Additional Information](#)

Line Details

Line	Item	Description	Quantity	UCM	Unit Price	Amount
1			1	EA	USD	USD

[More Information](#)

[View Attachments \(1\)](#)

[Approve](#) [Deny](#) [Hold](#)

Creating your own Expense Report

You are also able to create your own expense report if you choose to.

Combine all scanned receipts listed above (badge/flight info/travel awards, ect.) into ONE PDF

Save as LastName_FirstName_Name of Conference

Enter Expense Report in NU Financials

1. Log in to NUFinancials.
2. Select Expenses, then Create Expense Report.
3. Choose a Business Purpose from the drop down, then enter a Description.
4. Select Expenses Supervisor after clicking on the magnifying glass.
5. Attach receipts and proof of attendance (see General Information, above).
6. Select Accounting Defaults.
7. Enter Fund (3 digits), Dept (7 digits), PC Bus Unit (NWUNV), Project (8 digits, if necessary), and Activity ("01" if necessary).
8. Click Done.
9. Select Expense Report Action, then Add Expense Lines.
10. Enter Date expense was incurred, select Expense Type, enter Description, select Personal Credit Card, and enter Amount.
11. If you need to change the default chart string information for a specific expense or expenses, you can do so in the Accounting field.
12. Click Done.
13. In the upper right corner, click Save, click Review and Submit, click Budget Validation.

14. Click View Printable Report to print a copy if a signature is needed.
15. Click Submit.