

## **General Guidelines for All Expenses for Faculty**

*The estimated processing time for travel and reimbursement expenses is around 10 business days provided that all of the documentation submitted to the department conforms to university policies outlined below.*

*Incomplete submissions cannot be processed and will delay reimbursements.*

*For a comprehensive guide to the universities reimbursement policies from which the information below was extracted, please go to the following links:*

[CU Business Policy Link](#)

[CU Travel Policy Link](#)

*The information contained in these policies govern all reimbursements at Columbia and they should be referred to when in doubt about the appropriateness/required documentation for a requested expense reimbursement.*

### Guidelines

1. All reimbursements must be submitted within 120 days of the last expense. If an expense is submitted after 120 days from the date of the last expense, you must provide justification for the delayed submission in Concur. Expenses submitted after 120 days may also be subjected to taxation.
2. Expenses submitted after 1 year cannot be reimbursed.
3. Generally, Columbia allows one business day before the start of a conference/event and one business day after the end of the conference/event for travel.
4. All expenses must have a business purpose explicitly defined. Backup documentation is required for all conferences, workshops, and events. Local expenses must have a business purpose (i.e., Lunch with collaborators on a research to discuss research).

### Acceptable Business Purpose

Note that all Business purposes must be specific enough that a third-party reviewer can understand. *"Dinner with donor to discuss alumni event ideas"* is an appropriately documented business purpose.

### Unacceptable Business Purpose

*"Dinner with donor"* is not an appropriately documented business purpose. The business purpose of an expense may be obvious to the Payee, but not to a third-party reviewer and all reimbursements must pass through the third-party review prior to being approved for disbursal.

## Before your travel

If you travel internationally, you **must** register with Columbia Global Travel. This includes traveling from one country to another while you are already abroad. To register, go here:

<https://globaltravel.columbia.edu/content/register-trip>.

Note: Pre-registration is automatic if faculty books travel through WTI - World Travel Inc. <https://travel-expense.finance.columbia.edu/content/world-travel-inc>.

1. **Travel receipts must include date of expense, amount paid and method of payment.** If you are attending a conference, you must submit backup documentation which shows the dates and locations of the conference. This can be a picture of the program, a flier, an email, or a website screenshot. Note that original receipts must be provided for all air, lodging, and rental car expenses. For all other expense types, receipts must be provided if the expense is equal to or in excess of \$50. Please note you must include documentation for the following:

- Airfare/rail – business/first class – If the trip is 5 hours or more a price comparison must be included.

Reminder: All receipts must clearly show the name of the Payee (faculty).

If you have no alternative but to book through AirBnB for lodging, please include the following:

-A valid business reason: better pricing and budgetary impact/overall length of stay/need for facilities that an AirBnB has that a hotel does not (kitchen, etc.)

-Snapshot of nearby hotel (from Travelocity/Concur/other similar website) for comparison purposes

## Employee Guidelines

**Faculty are expected to obtain receipts for all expenses** for which they will be requesting reimbursement for. A receipt may take many forms (i.e., cash register receipt, copy of an order form, web receipt or confirmation). A receipt **must identify**:

- the date of purchase
- the vendor name
- itemized list and unit price of the purchased items
- the total amount
- for hotel stays – the check-in and check-out dates must be included

## Payee Guidelines

The payee is expected to obtain proof of payment for **any** expenses that require receipts (as outlined by our policy). Proof of payment may take many forms but must demonstrate that payment was tendered and must identify the means by which payment was tendered by the Payee. This information is usually included on the receipt. Examples of this may include notation of:

- Debit/Credit card payment (card type, last four digits of card and/or signature)
- “Cash Tendered”
- “Paid”
- A zero-balance due

## In Case there is NO PROOF

If no proof of payment is available in this form, a debit or credit card statement may be provided. Please black out any private or unrelated information. In addition, if you are missing a receipt a missing receipt affidavit is required. Link: [Missing receipt instructions](#)

## Meal Reimbursements

For Meal Reimbursements that are not charged against the per diem rates: All restaurant receipts must be itemized with a business purpose and names of attendees. Note the following maximum reimbursement rates per person:

- Breakfast \$25
- Lunch \$35
- Dinner \$75

The purchase of alcohol is prohibited on all expenditures charged against a grant.

## Receipt Acceptable Documentation

The restaurant or cash register receipts for business meals must be obtained, and uploaded images of them submitted with the Payee’s Expense Report. The receipt must include:

- the date and location
- the meal items purchased (identify alcohol)
- the total amount of the meal
- proof of payment

The cost of alcoholic beverages may not be charged to a sponsored research account and must be appropriately segregated.

A list of attendees is required if there are up to 10 (but only the number, if there are 11 or more names). Please include the names, the relationship to the University for each, and the business purpose of the meal must also be clearly documented.

All receipts are to be turned into Jason Land (jl5114@columbia.edu) who will initiate the reimbursement process.