



NCWIT Non-Employee Travel Reimbursement Instructions

Introduction

These travel instructions set forth requirements for accomplishing reconciliation and reimbursement for expenses incurred while traveling for NCWIT business purposes.

All NCWIT travelers should incur the lowest reasonable travel expenses and exercise care to avoid impropriety or the appearance of impropriety. **NCWIT travelers are expected to neither gain nor lose financially while traveling on NCWIT business.** All travel on behalf of NCWIT shall be completed using the most economical means available, which will satisfactorily accomplish NCWIT business. This includes airfare, hotel/lodging, rental car, and food. Please be sure to schedule your flights (minimum 2 weeks advance) and hotels as early as possible to secure the best rates. As well, be mindful of ride-hailing versus car rental, and food and beverage purchases. Finally, while being economical is helpful to the organization, being safe is paramount.

All travel to be reimbursed by NCWIT must be made in accordance with the University of Colorado and NCWIT travel policies. There are no exceptions to NCWIT travel policies, so travelers must understand policies **prior** to incurring expenses and requesting reimbursement:

- University of Colorado (CU) Travel: <https://www.cu.edu/psc/travel>; A detailed travel procedural statement is located at: <https://www.cu.edu/psc-procedural-statement-travel>
- NCWIT Travel Policy: <https://www.ncwit.org/travelpolicy>
- NCWIT Non-Employee Travel Reimbursement Worksheet: <https://www.ncwit.org/nonemployeetravel>

Travel Reimbursement Overview

NCWIT does not pay for travel in advance for Consultant and Non-Employee Travel. All travel expenses for consultants and non-employees will be paid through reimbursement after the trip has been completed. NCWIT requires all reimbursement requests to include:

- **Prior Approval:** Traveler or the requestor on behalf of the traveler must request approval from Terry Hogan or her proxy via Wrike (instructions below) prior to the trip.
- **Submit Within 30 Days:** Submission of reimbursement request must be within 30 days from completion of travel.
- **Signed Travel Reimbursement Worksheet:** The form **MUST** include your name, address, the business purpose of the travel, list of all travel expenses be signed and dated to be accepted.
- **Original Receipts:** All receipts must be **itemized**. To be eligible for reimbursement for expenses you must submit original receipts showing proof of credit card payment and itemized detail of purchases. NCWIT prefers digital receipts and that each receipt be submitted as an individual file/document. We ask that receipts be labeled as follows: *Amount, Date, Purpose, City*.
- **Please note:** Incomplete receipts for expenses *will not* be reimbursed.



BEFORE TRAVEL

All Travelers must have a Travel Request submitted via Wrike – Please follow these [instructions](#) to submit a request from your Wrike account, including information on how to get Wrike. For those without a current Wrike account, please submit a request using this [external request link](#).

Please allow up to 72 hours for a response.

- For Consultants, non-employees, or affiliate staff at other institutions, the NCWIT Travel Manager will get approval and communicate approval status via Wrike. Non-CU employees may book travel **after** receiving approval.

DURING TRAVEL

Allowable Expenses

Detailed Information about allowable and unallowable expenses can be found in NCWIT's Travel Policy (www.ncwit.org/travelpolicy), but in general, the following expenses are allowable:

- **Parking** at your hotel and/or home airport
- **Mileage** With a personal vehicle: (\$0.60/mi) to and from the airport, e.g., 90mi Boulder to DEN round-trip = \$54.00
 - NOTE: The travel mileage rate accounts for cost of gas and normal wear on your personal vehicle. You cannot additionally request reimbursement for gas for your personal vehicle.
 - For mileage reimbursement, you must include a screenshot mapping your 'to' and 'from' destinations as your receipt to itemize your mileage.
- **Transportation** between airport and hotel, meetings (e.g., ride-hailing, taxis, trains, or public transportation)
- **Meals** while in travel status. NCWIT does not pay a flat per diem and only reimburses for actual meal expenses, up to the maximum allowed by federal per diem based on location site. Original itemized receipts are required for all meals claimed on your reimbursement request form. Alcohol is **NOT** reimbursable. See the last page of this document to review how to remove alcohol and its related tax and tip from meal receipts. Or, for ease, we suggested purchasing alcohol separately. Only one entree per receipt is allowed and requests with more than one entree or meal will require additional explanation and review.
- **Lodging**. Please ensure your hotel receipt shows a ZERO or paid balance to indicate your stay was completed.
- **Airfare**. Coach fare only purchased a minimum **2 weeks** before travel begins. Upgrades & early bird fees are not allowed. Please make sure your receipt shows your itinerary, cost, date of purchase and method of payment.

Original Receipts: All receipts must be *itemized*. To be eligible for reimbursement for expenses you must submit original receipts showing proof of credit card payment and itemized detail of purchases.

Please note that vouchers, company credits, or gift cards are not reimbursable forms of payment

We ask that no alcohol or other non-reimbursable items be included on receipts, but if this happens, you must manually adjust the receipt total to remove the unallowable item, plus a percentage adjustment of tax and tip on those unallowed items. (See example at end of this document.)



The following are examples of charges **NOT reimbursable**:

- **Personal Expenses** such as dry cleaning, entertainment, toiletries, etc. or any expenses of a personal nature or not allowed and cannot be reimbursed.
- **Alcohol and any tax from alcohol** on a shared receipt. See the last page of this document to review how to remove alcohol and its related tax and tip from meal receipts. Or, for ease, we suggested purchasing alcohol separately.
- It is the responsibility of the traveler to know what is allowed for reimbursement in advance of any purchase.

AFTER TRAVEL

How to complete a Travel Reimbursement Worksheet

Step 1. Please download the **NCWIT Consultant and Non-Employee Travel Reimbursement Worksheet** document, located at: <https://www.ncwit.org/nonemployeetravel>.

Step 2. Fill out the top portion of the Travel Reimbursement Worksheet.

- Fill in the information regarding the person or entity to be reimbursed for expenses.
- Add address and other contact information (where check should be sent).
- Describe the business purpose of the expense. Explain what the expense was for, and which program or project is related. Note program funding if known.

Step 3. Fill out the rest of the Travel Reimbursement Worksheet in detail. Please note that additional comments and information are always welcome to justify and explain expenses. This can lead to a quicker reimbursement process.

- Note dates of travel and list expenses for each category by date. Expenses from Day 1 should be listed first. Use descriptions of expenses and input each amount.
- If you need more room for any category or an expense not included in the categories, there is additional space at the bottom of the worksheet to add these.
- In all cases, please ensure you enter the correct expense amounts so that the designated reviewer can ensure all expenses are accounted for and will be reimbursed. If additional space is needed, please use the bottom of the worksheet.
- Other (tips and incidentals): please provide comments and information about what these expenses are for. If you do not provide a business purpose, this expense will not be reimbursed.
- **Please note:** Incomplete receipts for expenses will not be reimbursed.



Step 4. Digital receipts are preferred by NCWIT. Please scan or take photos of all receipts and upload them to an email or folder that you will email together with your Travel Reimbursement Worksheet.

- Please submit each and all receipts **as individual documents/files** and do not combine them.
- We ask that you label each receipt/file with the following format:
Amount, Date, Purpose, City. (For example: *17.28_2-23_Meal_DC.PDF*)



Step 5. Sign and date your *Travel Reimbursement Worksheet*.

Step 6. Make or save a copy of your entire Reimbursement Expense packet prior to submission.

How to Submit a Reimbursement Request

To submit your reimbursement request, follow all the instructions above and e-mail the signed *Travel Reimbursement Worksheet* and all original digitized receipts to: Travel@ncwit.org.

or

If digital submission is not an option, please contact us for an alternative: Travel@NCWIT.org

Payment of Reimbursement Requests

All approved travel reimbursement payments will be issued within 60 days of receipt of a complete reimbursement request. Any additional information that is required after submission will delay payment.

Thank you for your attention to these details and for the work you will do with NCWIT.

Questions:
Please contact Travel Manager
Travel@ncwit.org

Example of how to include notes and recalculate totals for tip/tax and more on a receipt:



dinner
16.00 Food total
tax 1.60 Tax amount
on food
17.60
tip 3.00 Tip on Food
20.60
Total to be
reimbursed

To calculate total reimbursable for food when receipt includes alcohol - Circle items to be reimbursed, calculate new total for taxes and tip based on food alone