HOW TO Request Expense Reimbursement

(Student, Postdoctoral Scholar, Research Scientist, Staff, etc.)

- https://mse.engin.umich.edu/internal/howto/
- https://sites.google.com/umich.edu/opstoolbox/te

[(updates periodically) updated July 2026]

Decision Tree: 2/3 rule…If 2 out of 3 answers below are MSE, then MSE may process your reimbursement:

1) Are you a Materials Science & Engineering (MSE) PhD Student/Employee **(common PhD employee titles/positions: GSI, GSRA, GSSA, Temp. Employee, Postdoctoral Scholar–Employee / Postdoctoral Associate, Research Fellow, Postdoc)?** These titles are used when the researcher's salary is paid by a grant awarded to the Principal Investigator (PI) or the University. PhD students whose work is supported by sponsored project funds are classified as employees of the University. Similarly, postdoctoral scholars are designated as University employees, with their responsibilities encompassing the activities outlined in the funded project.

   (PhD Students (Postdoctoral Fellow, Postdoctoral Scholar–Fellow (Stipend Recipient)) who are funded strictly through
   - fellowships (awarded directly to them by an external agency),
   - stipend from training grants, or
   - have "direct support" (i.e., stipends with no required University service)

   are generally ***not*** classified as employees for tax or benefits purposes. The training is the primary goal, and they are usually not considered University employees in the same way as associates. If you are still not sure, contact HR to ask whether you are classified as an employee.)

2) Is your Advisor in MSE?
3) Is the shortcode MSE funds?

Update(s):

- As of May 1, 2026, the use of Collegiate Travel Planners (CTP), U-M's designated travel partner, will be preferred, but not required, to book flights for university-related travel. **If an employee elects to book flights outside of CTP, a U-M payment card (PCard or Travel & Hosting Card) must be used for payment.** Additionally, travelers will now be able to book basic economy fares using the CTP Lightning booking tool.

  Key Takeaways:
  1. If you **do not** have a Pcard:
     1. Book travel through CTP
     2. Obtain a Travel card to book outside of CTP
  2. If you have a Pcard, you can purchase airfare through CTP or from other vendors.

Business Purpose

The University will reimburse students and employees for reasonable and necessary expenses incurred for approved business travel, hosting, and lab supplies. A 'necessary expense' is one for which a clear business purpose exists and is within University expense policy limitations. The business purpose

must support or advance the University's goals, objectives, and mission. It must adequately describe the expense as a necessary, reasonable, and appropriate business expense for the University. The business purpose should include the conference name and dates when attending a conference. Students may be reimbursed for travel expenses before departure (e.g., registration, airfare).

PCard and Central Travel Account (CTA) Expenses:
All expenses charged to a PCard or Central Travel Account must be submitted and approved in the University's expense reporting system within 60 calendar days of the transaction date.

CoE Outstanding Transactions Policy: Effective July 1, 2026, any outstanding PCard or CTA transactions that are over 150 days old will be automatically charged to the school/college. The College of Engineering will then distribute those charges to the department, and the department will allocate them to the appropriate faculty member's discretionary account. If a charge should be applied to a sponsored account, a correction will need to be initiated after the fact.

At this time, only airfare and rail tickets may be booked using CTA as the payment method.

Employee Late Out-of-Pocket Expenses: Treated as Taxable Income (General Guidance, SPG Policy and Updates)

Out-of-pocket expenses should be submitted and approved within 60 calendar days in the University's expense reporting system after the trip, event, or receipt of goods/services or transaction date if no travel is involved. Provide a comment to explain the exception for each line with a transaction date > 60 calendar days. To be eligible for tax-free reimbursements, employees must submit their out-of-pocket expenses in full and accurately, **including corrections and approvals**, within 60 calendar days after the trip, event, receipt of goods/services, or transaction date if no travel is involved.

Once you enter your Emburse report and it receives **all required department approvals**, the 60-day timeline is stopped. Please note that if your report is returned or denied by Audit, the 60-day clock resumes as if it had never stopped. In these instances, it is crucial to address Audit feedback promptly and resubmit your report to maintain compliance.

Late out-of-pocket expenses will be processed through Payroll using a discretionary account (non-sponsored funds shortcode, like fund codes 10000 or similar, not 20000/25000)

Request a taxable reimbursement, which will be processed through Payroll. Submit all expense related documents via one of the following forms:

- SSC - FIN – Expense Report **For Employees Submitting Their Own Requests**
  Employees seeking to be reimbursed for out-of-pocket expenses (not services provided) will need to be paid through a TEA AddPay PAR (Taxable Expense Reimbursement, Additional Pay) if the expenses exceed 60 days. The first step in requesting the reimbursement would be to fill out the Finance form.

  The Finance Dept. will review the submission, and forward to the Travel and Expense team to generate the TEA request to HR Data Management Team with the necessary documentation attached.

- HR - PAR Request eform **For Requests Submitted by HR or a Delegate (PAR eForm Submission)**
  i. **Par Actions**: choose Additional Pay
  ii. **Earnings Code**: choose TEA
  iii. **Shortcode (a non-sponsored funds shortcode, a discretionary account is needed)**
     - Sponsored funds (fund codes 20000 or 25000) shortcode is typically **not** allowable through the TEA PAR process.
     - TEA PAR needs to be paid from a discretionary account.
  iv. **Approver**: enter Dept. Administrator
  v. **Notify**: enter name of RA
  vi. Once submitted, ignore the emailed SSC ticket entitled "SSC request has been Created (PAR Request – Current Staff...)", Payroll will triage the ticket to the appropriate team

Please keep in mind that for late receipts to meet the exception to the Accountability Plan requirements (established by the IRS), they are generally based on extenuating circumstances such as extended personal illness, death in the family, unanticipated leave of absence, unforeseen emergency beyond the control of the employee, and other similar circumstances. (Expenses submitted via Emburse that exceed 60 days from the transaction date will automatically be routed to the tax team for review within Emburse. There is no need to submit the Accountable Plan Exception Request Form via email for the tax team's approval.)

-- Questions regarding Procurement and Travel policy, email procurement.services@umich.edu or call 734-615-2000 (option 3, then option 1).
-- Questions regarding taxation of late expenses, email taxreporting@umich.edu.

A. Graduate Student / Employee (e.g., GSI, GSRA, GSSA, Temp. Employee, Postdoctoral Scholar–Employee / Postdoctoral Associate, Research Fellow, Postdoc)

- The University reimburses the student who paid the expense and whose name is on the receipt. If you shared lodging with other students and you paid the entire cost, only you (the credit card owner) will be reimbursed by the University.
- If another student paid for the expense, that individual must submit the reimbursement request.
- If a guest or parent paid the cost, that individual must submit a W-9 Form for tax purposes. Information required: Full name, address, relationship to student, bank or payment information (as required). Occasionally, a brief letter or email explaining why the guest or parent paid the expense instead of the student can help streamline processing.

Go to MSE's Travel and Expense (T/E) system Website>
https://deptapps.engin.umich.edu/thr/index/newform?dept=221800

Here's an Overview of the Process

A1) The student will need the following information and documentation to begin the reimbursement process:

- As the requester, you are responsible for obtaining written approval from your professor before submitting your reimbursement request. To ensure timely processing, please email your professor to request approval and include a PDF copy of the approval with your reimbursement submission. Please be aware that MSE Approvers will not review any reimbursement without the following information confirmed in the professor's email:
    a. Shortcode to be used for the expense
    b. Clear business purpose of the reimbursement
    c. An itemized list, including the total dollar amount requested
    d. All relevant receipts and/or paid invoices are attached for review
    e. Per diem details (if applicable)
        i. If your conference offers meals, exclude the meals - see below for additional information.
    f. Mileage information (if applicable)
        ii. Place of origin and destination (Street address, City, State, Zip)
        iii. Indicate if the mileage is round-trip
- Shortcode (If the employee's out-of-pocket expense is late, Payroll will need a discretionary account (non-sponsored funds shortcode, like fund codes 10000 or similar, not 20000/25000) since it is now a taxable expense.)
- Business purpose
    For conferences, provide:
    a. Conference website URL/Link
    b. Location
    c. Dates
- Traveling to a conference: Provide documentation supporting the business purpose (see CoE Travel and Hosting Policy) (e.g., conference agenda, program, or invitation)
    - **Student Travel Guide**: https://teamdynamix.umich.edu/TDClient/68/Portal/KB/ArticleDet?ID=15076

- Receipts with proof of payment (submitted to and a**pproved** by your professor). **Your request will not be processed if the receipts do not show evidence of payment.** Go to the Receipt Resource page for information on receipts and see "Helpful Information and Links" below.
- Rackham travel grant email, if applicable
    - For more information regarding student travel (including Rackham grant recipients), see the Student Travel Guide and page 14 below for MSE's Student Reimbursement and Award Reference Document.
    - If travel is for University business and partially covered by a travel grant, the airfare should be booked through CTP. Mark the portion covered by the grant as personal, which will result in a future payroll deduction. Alternatively, request lower out-of-pocket expenses to offset the grant and reconcile the CTP expense to the full amount (unless the grant funding is provided directly to the student and will cover the full travel cost).
    - If airfare was booked in CTP, submit trip expenses and the Rackham award letter via Emburse.
    - If airfare was not booked in CTPs, send the trip expenses and the Rackham award letter via the T/E system.
- Expense report approver - Default approvers can be your professor's designated RA. Staff should only be listed as an Approver if supervising someone.

A2) T/E system: The student submits the request via the T/E system, which sends an email to expensereports@umich.edu upon submission.

- Explicitly state when travel is for University business. If the purpose is not specified, the Student and Guest Reimbursement (SGR) team will default to "Academic Pursuit" as the purpose.

A3) T/E system: This creates a TDX ticket with the SSC, and the student should receive an email confirmation from TDX.

1. If the student doesn't receive a confirmation email, something went wrong. Please contact SSC to investigate the reason the confirmation email is being suppressed.
2. If the wrong "**Request Type**" is chosen, the report may not be routed for review and approval. But the system has recently been updated so that if you are an employee and you select "Student/Guest", the T/E system should analyze your employment status and route your form accordingly.

   (a) Standard Request – For reimbursements to graduate student employees (e.g., lab supplies).

   (b) Travel (TVL)/Hosting Request – For graduate student employees, solely for travel or hosting purposes.

   (c) Student/Guest TVL Request – For non-employee students and guests, solely for travel purposes.

   (d) Student/Guest REIM (reimbursement) Request – For non-employee students and guests (e.g., lab supplies).

A4) T/E system: SSC will work with the student if the student has any questions. **For the status of your reimbursement, contact the SSC (eForm, sharedservices@umich.edu, 734-615-2000 option 3).**

B. Non-employee Graduate Students (e.g., PhD students who are funded strictly through fellowships, training grants, or have "direct support" (i.e., stipends with no required University service)) **and Guests** (e.g., Participants) **with NO ACCESS to the Link (**https://deptapps.engin.umich.edu/thr/index/newform?dept=221800)

Email the information and documents mentioned in **A1** (above), as well as the following, to jorgenl@umich.edu

- Student Legal Name (Note: If you do not provide your legal name, your bank may decline your check. You will need to request that SSC correct it, and the MSE approval process will restart.) Employees or students may not be reimbursed for expenses paid by others.
- Mailing address (Street address, City, State, Zip) (Note: If you do not provide the correct address, your bank will decline your check, you will need to ask SSC to correct it, and the MSE approval flow starts again.)
- UMID
- Total dollar amount of request for reimbursement ("plus employee per diem and/or mileage", if applicable)

C. Undergraduate Students with NO ACCESS to the Link
(https://deptapps.engin.umich.edu/thr/index/newform?dept=221800)

Email the information and documents mentioned in A1 (above), as well as the following, to sfellers@umich.edu

- Student Legal Name (Note: If you do not provide your legal name, your bank may decline your check. You will need to request that SSC correct it, and the MSE approval process will restart.) Employees or students may not be reimbursed for expenses paid by others.
- Mailing address (Street address, City, State, Zip) (Note: If you do not provide the correct address, your bank will decline your check, you will need to ask SSC to correct it, and the MSE approval flow starts again.)
- UMID
- Total dollar amount of request for reimbursement ("plus employee per diem and/or mileage", if applicable)

Helpful Information and Links

Guidelines for Receipts	Required receipts must be submitted with the expense report and contain appropriate detail. If a receipt is lost or missing, documentation of approval by a higher administrative authority is required in the expense report.
	
	The expense must be an **allowable expense**, and the receipt must have proof of payment.
	• Go to Receipt Resource page for required information and tips on receipt submission.
	• Name of purchaser on the receipt - If someone else paid for the expense, that individual needs to submit the request for reimbursement. If the expense is incurred on behalf of another individual, include the name of that individual.
	• To expedite the review and approval process provide a proper **itemized receipt** that is legible and has the following details in a **single**, comprehensive document:
	  ○ Name of the individual who made the payment
	  ○ Name of the vendor
	  ○ **Itemized description** of the items purchased,
	  ○ **Total amount paid**
	  ○ **Method of payment**, such as the last four digits of the credit card used
	  ○ **Date of payment/purchase**
	  Receipts must contain appropriate detail, including starting and ending destinations, hotel charges and detailed item charges.
	• Itemized receipts with proof of payment are always required for the following:
	  ○ Expenses $75 and over
	  ○ Airline or rail tickets
	  ○ Hotel, Airbnb, or other overnight accommodations
	  ○ Car rentals
	• "Confirmation" without proof of payment is not a receipt
	• Receipts from digital wallet apps (e.g., Venmo, Zelle, or Cash App) can be problematic and not accepted as a proper receipt for payment.
	• **Proof of payment may be:**
	  ○ A copy of the paid receipt with a method of payment (includes name of payee) or zero balance. (Employees or students may not be reimbursed for expenses paid by others.)
	  ○ Copy of a cancelled check
	  ○ Bank or credit card statement, with sensitive information **redacted**. Submit one of these if payment was made using a Payment Apps or Digital Wallets)
	• When using an electronic form of payment through a third party (such as PayPal, Google Wallet or Amazon), an itemized receipt with the following information must be submitted:
	  ○ Supplier name
	  ○ Purchase price for the item
	  ○ Description of the item(s) purchased
	  ○ Quantity of the item(s) purchased
	  ○ Date of purchase
	• Upload receipts directly to Emburse by emailing them directly to: receipt@ca1.chromeriver.com. The system automatically recognizes your University email address and assigns the receipt to the correct account. In the subject line, include only the amount of the receipt. If you have a PCard account, when the receipt is added to your Emburse account, merge your receipt with the PCard expense.

Supplies	• Supply reimbursements to be processed within 60 calendar days of purchase date • Instead of buying the supplies, submit a request for MSE to make the purchase (see HOW-TO order supplies)

Per Diem (meals and incidental expense (M&IE)	• The per diem policy applies to University **employees only**.
	• Non-employee or Guests are not subject to the per diem policy. Non-employee travel meals are reimbursable for the actual cost incurred, provided the rate does not exceed the current maximums. Instead of reimbursing actuals, units may also pay non-employees at a set rate, provided that the rate does not exceed the rates from the following (For actual cost incurred, submit receipts for your meals)
	• The per diem rate is based on the location of your business activity each day (e.g., conference location)
	  ○ GSA per diem rate
	  ○ Foreign per diem rate
	  ○ Dept. of Defence (for Alaska, Hawaii, and U.S. territories) – ensure the amount does not include lodging. Please note that "lodging" is not included as part of Per Diem. Lodging must be documented separately, and its expenses are not covered by the Per Diem allowance. Additionally, a valid receipt is required to demonstrate that the individual has both paid the funds and indicate the specific purpose for which the payment was made. This documentation is essential for reimbursement and compliance with University guidelines.
	• The per diem policy for all University employees (student and staff) business travel applies only to travel meals and incidental expenses (certain living expenses, but not lodging).
	  ○ **Incidental expenses** include tips given to porters, baggage carriers, and hotel staff, as well as transportation between places of lodging and where travel meals are taken. Incidental expenses cannot be reimbursed separately as they are included in the per diem allowance rate.
	• Ground transportation (e.g., taxi, shuttle) to and from airports and railroad stations, and between business meetings while on travel status, is **not** included in the per diem incidentals
	• Receipts are not required for domestic or foreign employee per diem expenses; however, your Professor may still require you to provide receipts for travel meals and incidental expenses for your Professor's and/or sponsor's records.
	• Student employees, staff, and faculty traveling together on business should not share a meal as a business-hosted meal instead of per diem
	• Units also have the option to pre-pay per diems for students or guests with the Stored Value Card Program
	• Employees may qualify for an occasional meal allowance when traveling without an overnight stay—as a non-taxable de minimis fringe benefit—if the travel causes an employee to work in excess of 12 hours. The reimbursement is on per diem basis which is limited to 75 percent of the applicable rate. The term "occasional" is defined as infrequent and irregular, and the meal must be consumed when working overtime.

Hosting	• Hosting limits snacks/refreshment $30, $30/breakfast, $50/lunch, $80/dinner), including tax and tip – itemized receipt is required for all meal purchases.
	  ○ For alcohol, general (Fund 10000) or sponsored (20000, 25000) fund shortcodes cannot be used
	  ○ Any business meal costs that exceed the maximum allowances must be accompanied by a detailed explanation and have approval from a supervisor or higher-level administrative authority. The expenses, including tax and tip*, that exceed the amounts listed above must be segregated and cannot be charged to General or Federal funds.

	• Full names of all attendees, their title and Institution required for all events with food. • When submitting an expense for hosted meals, MSE requires an itemized receipt from restaurant or caterer. • Spousal or dependent business hosting expenses – not reimbursable.
Airfare Receipt and Travel Booking	• **Refer to the Student Travel Guide** (https://teamdynamix.umich.edu/TDClient/68/Portal/KB/ArticleDet?ID=15076) and page 14 below for MSE's Student Reimbursement and Award Reference Document. • Business expenses paid out of pocket will now only be reimbursed after a trip or event takes place. • As of May 1, 2026, the use of Collegiate Travel Planners (CTP), U-M's designated travel partner, will be preferred, but not required, to book flights for university-related travel. **If an employee elects to book flights outside of CTP, a U-M payment card (PCard or Travel & Hosting Card) must be used for payment.** Additionally, travelers will now be able to book basic economy fares using the CTP Lightning booking tool. Key Takeaways: ▪ If you **do not** have a Pcard: • Book travel through CTP • Obtain a Travel card to book outside of CTP ▪ If you have a Pcard, you can purchase airfare through CTP or from other vendors. • The Fly America Act requires that flights purchased with federal funds be flown with a "U.S. flag" air carrier service (complete list of certified U.S. flag air carriers). Otherwise the U-M Fly America Act exception form must be completed and sent to Sponsored Programs, sp-flyamerica@umich.edu. • Book flights through CTP by contacting an agent or using the Lightning booking tool. ○ For Travel Portal and Lightning navigational assistance, call 877-804-3688 (Option 1) or email na.online@travelctm.com ○ For CTP and Lighting, log in to https://wolverineaccess.umich.edu/ and click CTP Travel Booking tile. See KBA 3.0 Travel Booking: Booking for Employees for instruction on **How to Book in Lightning.** • Airfare and rail tickets booked through CTP will use CTA as the payment method. CTA is a virtual credit card used for all U-M airfare and rail bookings, associated service fees, and other fees with CTP. ○ Hotels, car rentals, and black car services may be conveniently booked through CTP. However, these expenses will **not** be charged to the University's CTA. At this time, only airfare and rail tickets are eligible for booking using the UM CTA. ○ When you use a U-M PCard, Travel Card, or the CTA, you unlock a range of insurance benefits offered by our corporate card provider, JPMorgan Chase, to ensure peace of mind during your travels. Insurance coverage includes: ▪ Worldwide Travel Accident Insurance ▪ Hotel/Motel Burglary Protection ▪ Medical Evacuation ▪ Lost, Stolen, or Damaged Baggage Protection For a detailed overview of these benefits from JPMorgan Chase, as well as University-offered travel health coverage and rental car protections, please visit the Travel Insurance Guide for Employees. • If airfare or rail tickets were incorrectly booked, contact travelprogram@umich.edu. • If a flight should have been booked through CTP or with a U-M payment card but was instead purchased personally, there is a one-time exception for booking flights out of pocket, unless this has already been used under the previous policy (see 4/29/26 email). The exception form has been

updated to reflect a limited number of extenuating circumstances, including airfare paid via third-party reimbursements. The approver for the exception form is MSE's Department Administrator.

Exception requests should be obtained before the airfare is purchased to ensure approval, and will require departmental approval by the Dept. Administrator before submission.

When you submit your exception form, add Dept. Administrator as the approver. Upon submission, you will get a ticket number via email.

- When you receive the approval, go to your airfare expense in Emburse and enter your ticket number in the "Airfare Booking Exception TDx Ticket Number" field.
- Attach the PDF copy of the approval to your airfare expense.

- Late (over 60 days) expenses booked through CTP using UM's virtual credit card (CTA) (i.e., airline tickets) are **not** be treated a taxable income and should be submitted via Emburse.
- Non-employees (student guests and non-employee students) may purchase their own flights **outside** of CTP and submit a Non-Employee reimbursement.
- Spouse/Family Members Traveling with Employee or Guest – contact CTP.
- **Use CTP to book airfare on behalf of university guests:** If you do not have access to the CTP system, please take the following steps to arrange your airfare:
  - Contact your PI or professor—who is the CTP profile owner—and confirm whether they approve booking the airfare on your behalf.
  - If they agree, request that the profile owner send an approval email to CTP (umichigan@ctptravelservices.com) authorizing the use of their profile for your flight booking.
  - The approval email should include:
    - Dates of travel
    - Departure and arrival destination
    - Your legal name
    - Your date of birth
    - Your email address
    - Your phone number
    - Your driver's license number (must be REAL ID) or passport number
    - (optional) Frequent flyer number, TSA number, etc.
    - Trip Purpose

  And your professor will be asked which of the following ticket price is preferred:
    - **Refundable** (higher price): UM will automatically get the funds back to the CTA.
    - **Nonrefundable** (lower price): UM has one year to use the airline credit/voucher or lose it, and most airline companies will charge $100 for traveler name change, if the ticket is not for the same traveler.
      If the nonrefundable option is chosen and you **cancel** your flight:
      1. Submit your expense (canceled airline expense) via the T/E system or Emburse so that it may be reconciled.
      2. Your professor can assist with monitoring the airline credit/voucher and ensuring any future use complies with UM procedures:
         - Share documentation and flight details with your professor. Provide all relevant information and documentation about the canceled flight to your professor. Inform them that an airline voucher or credit was issued, which you or another authorized traveler may use within one year. Communicating this ensures the credit does not go unrecognized and is available for related research travel.

- Communicate about tracking the available or remaining airline credit. Advise your professor that any future flights booked using the airline credit or voucher will **not** appear in your **Emburse account**. To monitor the available or remaining airline credit, contact CTP or you need to refer directly to your **CTP account**, where available balances are displayed. This clarification prevents confusion or misreporting of expenses and assists with tracking funding sources properly.
- Notify your professor about potential journal entry requirements. If future trips using the remaining airline credit require a different shortcode (funding source), inform your professor that a journal entry must be completed after reconciling the expense. This step is essential to ensure that travel expenses are charged to the correct account for accurate allocation of funds.

Afterwards, you may email or call CTP (877-804-3688) to make your own (reasonably priced) reservation.

- CTA transaction routing - select whether CTA transaction should route to the traveler or arranger who is booking the travel. Ensures expenses route to correct person to avoid approval conflicts
- "Airfare Seat Assignment"—Use this for designated seat purchases (not upgrades), with expenses over $75 auto-routing for audit. This streamlines reporting and removes the need for an airfare exception for these expenses
- If you have an unused airline ticket, the system will no longer ask if unused ticket needs to be applied to booking in progress. Unused tickets already appear on the next screen of the checkout process
- Delta Comfort Plus, or Delta Premium Select are premium economy seats (an improved version of the main cabin, the economy class on Delta). These are considered an upgrade and is not allowable unless the in-air flight time is 8 or more hours (not including layover time) or if an approval is obtained from a Chancellor, Dean, Director, Vice Chancellor, Vice President, or Senior University Officer.
- The University will not reimburse airline tickets purchased using frequent flyer miles, reward points (Flex Points), eCredits, etc.
  - eCredits: Only the actual out-of-pocket portion paid (not covered by credits) is eligible for reimbursement and only with appropriate documentation. If the original eCredit was used toward a University business-related flight and you paid out of pocket for that expense, you may submit that transaction for reimbursement, along with the appropriate documentation. If you have unused credit and have questions about using it, call CTP. CTP will be able to tell you what fees will be charged and how they can be split if needed. Each carrier has different fees and rules on unused tickets.
- Flights should be booked at least 14 calendar days in advance. Flights booked with less than 14 calendar days advanced purchase require an explanation comment for the booking delay for the approver's review. Approvers may deny charges that result from last minute airline booking.
- You can only be reimbursed for business portion of your travel; personal travel expenses will not be included. (Combining Business and Personal Travel, Bringing a Personal Guest on a Business Trip)
- Attach a coach class **fare comparison** if one of the following applies:
  - If your itinerary includes personal travel alongside business obligations
  - Any situation that is not straightforward, such as traveling to a different return location (e.g., the place of origin is Detroit, and your return destination is Chicago)

	○ If you drove your personal vehicle to your business-related destination instead of flying ▪ (Typically you do *not* need a coach-class airfare comparison when the traveler chooses to rent a car and drive.) ○ You upgraded when the length of the flight is less than eight hours To determine the allowable business portion of the airfare, a fare comparison from the Travel Booking Tool (Lightning) is required at the time of booking. However, if a comparison wasn't obtained then, a new one may be accepted if: ○ The travel dates are at least 14 days in the future as this timeframe typically yields more economical fares ○ The comparison is pulled from Lightning ○ The departure and return dates match the original business trip Example: Your event travel dates were 1/14/26 (Wed.) through 1/16/26 (Fri.). Today is 2/2/26. The next Wednesday falls on 2/4/26. Identify the Wednesday two weeks from February 4, which is 2/18/26. Use Lightning (or the airline's website you originally used) to pull a flight cost comparison covering the period from 2-18 (Wed.) - 2/20 (Fri.). Capture your findings by taking a screenshot or generating a PDF of the available flights or flight list. This documentation will serve as your official cost comparison submission. If your airfare cost is higher than the business-only airfare, you must document and itemize the difference when submitting your expense report. Any additional amount beyond the approved business expense will be deducted from your payroll. This comparison should demonstrate the cost that would have been incurred had the most economical coach or economy airfare been selected for your business trip. The purpose of this requirement is to verify that requested reimbursements do not exceed the cost of the lowest-price airfare available within a logical and reasonable travel schedule. • **CTP Price Matching -** If you find a lower fare for the same flight and class on an airline's website, CTP can often price match ***before*** you book. Just follow these steps (see CTP Price Match Guide): ○ Compare both the Lightning confirmation page and the airline's final price (for the same flight and fare class) ○ Call a CTP agent at 877-804-3688 (Option 2) OR ○ Email your screenshots and flight details to na.pricematch@ctptravelservices.com If CTP cannot match, then you request an exemption based on pricing or available flight.
Registration	• Business expenses paid out of pocket will now only be reimbursed after a trip or event takes place. • Documentation support (e.g., conference agenda, program, invitation, etc.) is required (see CoE Travel and hosting Policy).
Lodging (Max $450/night)	• Itemized hotel folio or receipt is required for reimbursement. • **Standard Accommodations:** Typically a standard room in a commercial hotel or motel.

	AirBnB ○ Provide a valid reason for choosing AirBnB instead of hotel. ○ See 'Shared Accommodations' below ○ Airbnb travel insurance is not reimbursable, and Airbnb has a wide range of cancellations, be sure to choose an AirBnB with a flexible cancellation policy. ○ AirBnBs and VRBOs usually include a high cost "cleaning fee" that should be considered when doing the cost comparison. The University will reimburse the cleaning fee as an allowable expense. ○ If you purchased lodging from an Airbnb (individual) and would like the University to pay the AirBnB homeowner, an W9 may need to be completed by the individual (home owner) and payment processed thru UM People Pay. See People Pay Decision Tool at https://peoplepay.umich.edu/. • **Shared Accommodations** ○ When sharing a room with another U-M traveler, reimbursement will be issued to the student or employee whose name and payment details are clearly listed on the hotel receipt and who has paid for the accommodation. To ensure smooth processing, please confirm that your name and payment information are prominently displayed on the submitted receipt. ▪ **Rackham Travel Grant Recipients -** If you are funded by a Rackham Travel Grant and sharing accommodations, you have two options: 1. Request the hotel or Airbnb to split the invoice so each traveler receives an individual receipt. 2. Alternatively, one student may pay the entire lodging bill and seek reimbursement from the others. It is each student's responsibility to pay the individual who covered the bill or to collect payment from fellow travelers, as applicable. ○ If sharing with a non-U-M traveler, only the portion attributed to the U-M traveler is reimbursable. ○ Spousal or dependent travel expenses - Expenses that do not have a clear university business purpose are not allowable as a tax-free reimbursable expense; if reimbursement is approved for these expenses, the reimbursement may be paid as taxable income to the employee.
Ground transportation	• The University generally does not pay for: ○ Transportation for personal errands or travel meals ○ Local in-town transportation (e.g. travel between University buildings on the same campus for meetings or within the city of the employee's primary work location), including mileage on personal vehicles, ride-share services, and car rentals for local use (e.g., zip cars) ○ Local parking/tolls ▪ **Local parking** and when it is allowable for an **employee**: If the residence out-of-state is a requirement to fulfill the job then the out-of-state location is their main business location and travel to Ann Arbor is reimbursed as normal business travel. If the residence is not a job requirement but due to personal reasons, their official work location would likely be somewhere in Ann Arbor which would make local transportation such as parking and commuting costs not reimbursable

	○ Commuting costs (e.g., the costs associated with driving a car between home and the normal place of work or business) • For four or more ground transportation receipts or trips, the purpose, place of origin and final destinations should be provided for each trip. • If claiming ground transportation in lieu of airfare, provide a coach class fare comparison from Emburse Enterprise at least 14 calendar days in advance of the trip.
Rental car and Fuel	• Requested amount should **exclude the refundable security deposit**. The university will not have a means to be credited for this amount if the charge is out-of-pocket. • Fuel can only be claimed for University vehicles and rental cars. (Fuel for personal vehicles is included in personal car mileage (see below).) • If renting a vehicle is your most cost-effective option, book your rental vehicle in Lightning, the University's online booking tool, with the University's preferred suppliers, National Car Rental and Enterprise Rent-A-Car. • Travelers should decline all collision insurance (**CDW (Collision Damage Waiver), LDW (Loss Damage Waiver)** or Insurance Supplement) on rental vehicles, with the exception of some international travel. If you paid for it, please itemize the additional insurance charges as a personal expense.
Mileage (effective 1/1/26 $0.725/mile, includes fuel)	• Provide the place of origin and destination and indicate if mileage is roundtrip. • The place of origin for business travel mileage is computed from the employee's U-M unit office location or home address, whichever is closest to the destination. • When claiming mileage in lieu of airfare, a coach class fare comparison from CTP (through the online travel booking tool) at least 14 calendar days in advance of the trip is required with the expense report submission. Mileage reimbursement is limited to the amount of the coach airfare. ○ For a short trip such as Ann Arbor to Detroit (about an hour's drive and less than 50 miles), a flight cost comparison is not required. It's clearly more practical and cost-effective to drive than to fly on such a short route. • Mileage **exceptions** due to job requirements (where travel is extensive and intrinsic to the type of work the employee is expected to do) may be made with approval from the appropriate higher administrative authority and submitted to SSC using the Audit Exception Request Form.

For assistance, contact:

- **Graduate Students and Guests,** contact Financial Specialist (jorgenl@umich.edu, 734-763-6043)
- **Undergraduate Students,** contact Administrative Assistant (sfellers@umich.edu, 734-764-2383)
- **For the status of your reimbursement,** contact the SSC (eForm, sharedservices@umich.edu, 734-615-2000 option 3, 1)
- **CTP** (24/7 after-hours agent assistance), umichigan@ctptravelservices.com, 877-804-3688

Helpful Training Videos and Resources

- CoE Training Presentation on Travel & Expense (TE) System: https://drive.google.com/file/d/1IA3JO4QU_oi1xNdN8Dv55_gVmhavayfN/view
- CoE TE and Purchasing Toolbox: https://sites.google.com/umich.edu/opstoolbox/home-page
- CoE Hosting and Travel Policies: https://rpm.engin.umich.edu/college-of-engineering-hosting-and-travel-policies/
- Procurement - Travel & Expense Reporting: https://procurement.umich.edu/u-m-employees/travel-expense-reporting/expense-reporting/

- Travel and Expense General Inquiry eForm: https://teamdynamix.umich.edu/TDClient/40/Portal/Requests/TicketRequests/NewForm?ID=7SfdOn4albU_&RequestorType=Service
- Allowable and Unallowable Travel Expenses: https://teamdynamix.umich.edu/TDClient/68/Portal/KB/ArticleDet?ID=8557
- Restricted Purchases and Special Approvals: https://teamdynamix.umich.edu/TDClient/68/Portal/Shared/FileOpen?AttachmentID=8cd99a69-ce90-4e0c-9996-674f321343f5&ItemID=8570&ItemComponent=26&IsInline=-1
- Receipt Resource: https://ssc.umich.edu/travel-expense/ssc-receipt-resource/
- Collegiate Travel Planner (CTP) Travel Booking Overview: https://teamdynamix.umich.edu/TDClient/68/Portal/KB/ArticleDet?ID=9637
  For CTP and Lighting, log in to https://wolverineaccess.umich.edu/ and **select the CTP Travel Booking** tile.
- Group travel via CTP: https://procurement.umich.edu/u-m-employees/travel/group-travel/

Employee Emburse Enterprise Account:

- Emburse Enterprise Login: https://wolverineaccess.umich.edu/
- Emburse Enterprise TEE101 U-M Emburse Enterprise Travel & Expense Report Training: https://maislinc.umich.edu/
- Emburse Enterprise Overview: https://teamdynamix.umich.edu/TDClient/68/Portal/KB/ArticleDet?ID=11932
- Emburse Create and Manage Expenses: https://help.chromeriver.com/hc/en-us/sections/15223380608269-Create-Manage-Expenses **or** https://help.spend.emburse.com/hc/en-us/categories/4424781908877-Expenses-Transactions
- Emburse eWallet instructions: https://help.mobile.emburse.com/hc/en-us/articles/14288660923149-View-Receipts-In-Your-Wallet
- Emburse Attach eWallet Transactions to a Report: https://help.chromeriver.com/hc/en-us/articles/15295569848845-Attach-eWallet-Transactions-to-a-Report

Standard Practice Guide Policies

- Travel and Business Hosting Expense Policy for faculty and staff: https://spg.umich.edu/policy/507.10-1
- Payments/Reimbursements to Students for Non-Employment Purposes: https://spg.umich.edu/policy/601.30
- Procurement Travel and Expense policies: https://procurement.umich.edu/u-m-employees/purchasing/process-and-policies/

Materials Science & Engineering

Student Reimbursement and Award Reference Document (May 2026)

Activity (Student travel)	University Business	Academic Pursuit	CTP booking rule	Payment / processing notes
Recognized Student Organization (Maize Pages) travel (conference or non-conference; presenting or not)	X		CTP REQUIRED	Use CTA when available; otherwise pay via unit-approved U-M method. Often easier to transfer funds to SOAS than reimburse students.
Course projects (field trips; internships required for a class; course-required travel)		X	**CTP NOT PERMITTED**	Book outside CTP per unit guidance; student out-of-pocket only if allowed/approved. Retain course documentation as needed.
Attending a conference but not presenting		X	**CTP NOT PERMITTED**	Book outside CTP; keep agenda/registration as support.
Presenting at a conference (related to a specific course)		X	**CTP NOT PERMITTED**	Book outside CTP; retain course connection documentation.
Reimbursement from a training grant		X	**CTP NOT PERMITTED**	Book outside CTP and follow sponsor/unit rules.
Competition travel (group or individual)		X	**CTP NOT PERMITTED**	Book outside CTP; follow unit process and documentation requirements.
Presenting at a conference (unrelated to a specific course)	X		CTP REQUIRED	Provide itinerary as supporting documentation.
Sponsor site visit (including corporate sponsors)	X		CTP REQUIRED	Coordinate with sponsor/unit for any additional requirements.
Research project travel (not to a conference—e.g., field work, research site visit)	X		CTP REQUIRED	Retain documentation showing research purpose/dates/sites.
Rackham travel grants (recipient reports to Office of Financial Aid)			DEPENDS (match classification: University Business → CTP REQUIRED; Academic Pursuit → CTP NOT PERMITTED)	Recipient responsible for required reporting to Office of Financial Aid; confirm classification and process with Rackham/unit.