

# 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 Nov. 2025]

**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.)

- 2) Is your Advisor in MSE?
  - 3) Is the shortcode MSE funds?
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## **Update(s):**

- Business expenses paid out-of-pocket will now only be reimbursed after a trip or event occurs. There will be a grace period until January 1, 2026, for the transition.

## **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).

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

Out-of-pocket expenses should be reconciled in the University's travel and expense system within [60 calendar days](#). 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 completely and accurately, **including corrections and approvals**, within 60 calendar days from the date of the transaction, the end date of the trip, or the date of the hosting event.

The Emburse report would need to be entered and receive ALL approvals from the Department. This includes department approvers. That stops the 60-day "clock" once all debt-related approvals are completed in the report.

Late out-of-pocket expenses will be processed through Payroll using a discretionary account (non-sponsored funds shortcode).

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. Complete and include the [Accountable Plan Exception Request Form](#) with receipts to request an exception.

### **Out-of-Pocket Expenses**

**Due Date** – within [60 calendar days](#) (**including corrections and approvals**) after the Start Date

**Start Date** – The start date is generally the date of the transaction (includes virtual conference registration fee); however, other dates may also serve as the start date.

1. When traveling, the start date for expenses incurred that relate to the trip is the date of the trip's end (includes, airline or conference registration invoices purchased months prior to the conference, per diem, and mileage)
2. When hosting an event, the start date for expenses incurred that relate to the event is the date of the event

-- Questions regarding Procurement and Travel policy, email [procurement.services@umich.edu](mailto:procurement.services@umich.edu) or call 734-615-2000 (option 3, then option 1).

-- Questions regarding taxation of late expenses, email [taxreporting@umich.edu](mailto: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 for the expense, whose name is on the receipt.

- If another student paid for the expense, that individual must submit the request for reimbursement.
- If a guest or parent paid for the cost, that individual needs to 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.
- If you shared lodging with other students and paid the entire cost, only you (the credit card owner) will be reimbursed. You will need to obtain reimbursements from the other students.

**Go to MSE's Travel and Expense (TE) 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, it is your responsibility to send an email to your professor requesting approval for reimbursement and attach that approval to your reimbursement request. Your request will not be processed without this approval. MSE Approvers will not approve, and SSC will not process, a reimbursement without a copy of the email (PDF format) from the professor approving the following:
  - a. Shortcode to use
  - b. Business Purpose
  - c. Itemize and provide the Total dollar amount of the request for reimbursement.
  - d. Receipts and/or paid invoices you attached to your email for their review
  - e. Per Diem for University employees on business travel (if applicable)
    - i. If your conference offers meals, exclude the meals.
    - ii. (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 (\$30 for breakfast, \$30 for lunch, and \$70 for dinner). Instead of reimbursing actuals, units may also pay non-employees at a set rate, provided that the rate does not exceed the [GSA per diem rate](#) (or [foreign per diem rate](#))
  - f. Mileage (if applicable)
    - i. Place of origin and destination (Street address, City, State, Zip)
    - ii. Indicate if the mileage is round-trip
- Shortcode (If the employee's out-of-pocket expense is late, SSC will need a discretionary account since it is now taxable.)
- Business purpose
  - For travel to conferences, documentation supporting the business purpose (see [CoE Travel and Hosting Policy](#)). (Your airfare must be booked using [Collegiate Travel Planners \(CTP\)](#); otherwise, your request for reimbursement will be **denied**.)
    - a. Conference agenda, program, or invitation
    - b. Conference website URL/Link
    - c. Location
    - d. Dates
- Receipts with proof of payment (submitted to and **approved** 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
- \*\*\*Regarding the title of your expense report, SSC must enter the correct information.  
In (T/E) "**Additional Notes**" to SSC,
  - If you are an **employee**, please include the statement, "Please enter my unique name under the expense report Title as an identifier. Please do not enter the SAPOC or Research Administrator's (RA) unique name, as the SAPOC or RA serves as the Approver."
  - If you are **not an employee**, please include the statement, "Please enter your (SSC preparer's) name followed by 'on behalf of [my name]' under the expense report Title as an identifier. Please do not enter the SAPOC or Research Administrator's (RA) unique name, as the SAPOC or RA serves as the Approver."

- Expense report approver - Default approvers can be your professor's designated RA. Staff should only be listed as an Approver if supervising someone.

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

**A3)** 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, it means that 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)** SSC will work with the student if they have any questions. **For the status of your reimbursement, contact the SSC ([eForm](#), [sharedservices@umich.edu](mailto:sharedservices@umich.edu), 734-615-2000 option 3). If you have not heard from SSC within 10 calendar days, contact Lourdes Jorgensen.**

**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 Lourdes Jorgensen ([jorgenl@umich.edu](mailto: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 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 Shelley Fellers ([sfellers@umich.edu](mailto: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 per diem and/or mileage”, if applicable)

## Helpful Information and Links

Guidelines for Receipts	<p>The expense must be an <a href="#">allowable expense</a>, and the receipt must have proof of payment.</p> <ul style="list-style-type: none"> <li>• Go to <a href="#">Receipt Resource</a> page for required information and tips on receipt submission.</li> <li>• 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.</li> <li>• A proper receipt is legible and shows the itemized description of the items purchased, the date of purchase, the amount paid and the method of payment. Receipts must contain appropriate detail, including starting and ending destinations, hotel charges and detailed item charges.</li> <li>• <a href="#">Itemized receipts</a> with proof of payment are always required for the following: <ul style="list-style-type: none"> <li>○ Expenses \$75 and over</li> <li>○ Airline or rail tickets</li> <li>○ Hotel, Airbnb, or other overnight accommodations</li> <li>○ Car rentals</li> </ul> </li> <li>• “Confirmation” without proof of payment is not a receipt</li> <li>• <b>Proof of payment may be:</b> <ul style="list-style-type: none"> <li>○ 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.)</li> <li>○ Copy of a <a href="#">cancelled check</a></li> <li>○ <a href="#">Bank or credit card statement</a>, with sensitive information redacted. Submit one of these if payment was made using a Payment Apps or Digital Wallets)</li> </ul> </li> <li>• Receipts from digital wallet apps like (e.g., Venmo, Zelle, or Cash App) can be problematic and not accepted as a proper receipt for payment.</li> <li>• 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: <ul style="list-style-type: none"> <li>○ Supplier name</li> <li>○ Purchase price for the item</li> <li>○ Description of the item(s) purchased</li> <li>○ Quantity of the item(s) purchased</li> <li>○ Date of purchase</li> </ul> </li> </ul>
Supplies	<ul style="list-style-type: none"> <li>• Supply reimbursements to be processed within 60 calendar days of purchase date</li> <li>• Instead of buying the supplies, submit a request for MSE to make the purchase (see HOW-TO order supplies)</li> </ul>
<a href="#">Per Diem</a> (meals and incidental expense ( <a href="#">M&amp;IE</a> ))	<ul style="list-style-type: none"> <li>• The per diem policy applies to all University employees only</li> <li>• The per diem rate is based on the location of your business activity each day (e.g., conference location)</li> <li>• 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). <ul style="list-style-type: none"> <li>○ <b>Incidental expenses</b> include tips given to porters, baggage carriers, and hotel staff, as well as transportation between places of lodging and where travel meals are</li> </ul> </li> </ul>

	<p>taken. Incidental expenses cannot be reimbursed separately as they are included in the per diem allowance rate.</p> <ul style="list-style-type: none"> <li>• Ground transportation (e.g., taxi, shuttle) to and from airports and railroad stations, and between business meetings while on travel status, is <b>not</b> included in the per diem incidentals</li> <li>• Receipts are not required for domestic or foreign 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.</li> <li>• Student employees, staff, and faculty traveling together on business should not share a meal as a business-hosted meal instead of per diem</li> <li>• Units also have the option to pre-pay per diems for students or guests with the Stored Value Card Program</li> <li>• 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.</li> </ul>
<a href="#">Hosting</a>	<ul style="list-style-type: none"> <li>• Hosted meals reimbursements to be processed within 60 calendar days of hosted event date.</li> <li>• <a href="#">Hosting limits</a> \$30/breakfast, \$30/lunch, \$70/dinner, including tax and tip – itemized receipt is required for all meal purchases <ul style="list-style-type: none"> <li>○ For alcohol, general (Fund 10000) or sponsored (20000, 25000) fund shortcodes cannot be used</li> </ul> </li> <li>• Full names of all attendees, their title and Institution required for all events with food.</li> <li>• When submitting an expense for hosted meals, MSE requires an itemized receipt from restaurant or caterer.</li> </ul>
Airline ticket and <a href="#">Travel Booking</a>	<ul style="list-style-type: none"> <li>• All employees will be required to use <a href="#">CTP</a>, U-M's designated travel partner, to book flights for University-related travel. Central Travel Account (<a href="#">CTA</a>) will be used as the payment method.) Book flights through CTP by contacting an agent or using the <a href="#">Lightning</a> booking tool (see KBA <a href="#">3.0 Travel Booking: Booking for Employees</a> for more information). <b>For CTP and Lightning, log in to <a href="https://wolverineaccess.umich.edu/">https://wolverineaccess.umich.edu/</a> and click CTP Travel Booking tile.</b></li> </ul> <p>MSE policy: If airfare is not booked using CTP:</p> <ul style="list-style-type: none"> <li>○ First offense – warning</li> <li>○ Second offense - Reimbursement will be <b>denied</b></li> </ul> <ul style="list-style-type: none"> <li>• Late (over 60 days) expenses booked through CTP (i.e., airline tickets using <a href="#">CTA</a>) will <b>not</b> be treated a taxable income and submitted to Payroll.</li> <li>• <a href="#">CTA</a> is a <u>virtual credit card</u> used for all U-M airfare bookings, rail bookings, associated service fees, and other fees with CTP. <b>Please note, trips that are 100% personal travel or for <u>'academic pursuit'</u> should NOT be booked using CTP.</b></li> </ul> <p>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.</p> <p>Insurance coverage includes:</p> <ul style="list-style-type: none"> <li>• Worldwide Travel Accident Insurance</li> <li>• Hotel/Motel Burglary Protection</li> <li>• Medical Evacuation</li> <li>• Lost, Stolen, or Damaged Baggage Protection</li> </ul>

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](#).

- Only employees may book through CTP.
- Non-employees (student guests and non-employee students) may still purchase their own flights **outside** of CTP and submit for a [Non-Employee reimbursement](#).
- Employees may book airfare on [behalf of the guest](#) or student with CTP.
- Employees may **not** book airfare for **non-employees outside of CTP**.
- **Students and Academic Travel:** If a student is traveling for personal reasons or academic purposes (whether or not they are employed by U-M), they should not use CTP.
  - This includes students who will be seeking reimbursement through the [TBHER process](#), as well as those who receive an academic travel grant in advance of booking.
  - If the cost of the flight exceeds the amount of their travel grant, the remainder can be reimbursed through a TBHER.
- **Fellowship and CTP Profile**

If you are on **fellowship** and have no access to CTP, ask your PI or professor (CTP profile owner) if they agree to [book the airfare on your behalf](#). If approved, the profile owner will email CTP (umichigan@ctptravelservices.com) their permission to use their profile to book a flight for you. The email will include the following information:

  - 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:
      - a. 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.



- b. 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.
- c. 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.

- If you need to book airfare outside of CTP due to extenuating circumstances, submit the [Airfare Booking Exception form](#). Acceptable reasons may include:
  - The airline you require is not accessible through CTP.
  - You need to [change a flight](#) originally booked outside of CTP (for example, flights purchased before July 1, 2025) that results in extra out-of-pocket expenses.
  - You encounter a same-day flight change after check-in that requires additional out-of-pocket costs. While this is typically permissible, submitting the exception form is still required for reimbursement and can be completed retroactively.
  - You are unable to use the CTP booking platform due to accessibility barriers.

Exception requests should be [obtained before the airfare is purchased](#) to ensure approval, and will require departmental approval by the Dept. Administrator (Todd Richardson), before submission.

When you submit your form, you will get a ticket number. When you get the approval, enter in Emburse your TDx ticket number in the “Airfare Booking Exception TDx Ticket Number” field. And the pdf approval must be attached.
- If you have an airline eVoucher or eCredit from a ticket purchased outside of CTP before the [July 1, 2025 requirement](#), you may use it toward a new ticket for university-related travel by working directly with the airline. If the cost of the new ticket exceeds your credit value and you pay the difference with a personal card, you must complete an [Airfare Booking Exception form](#) and provide documentation showing the original ticket cost and the new ticket purchased with the credit.
- [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.
- Travel reimbursements to be processed within 60 calendar days of travel return date.
- 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



	<p>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.</p> <ul style="list-style-type: none"> <li>• Flights should be booked <a href="#">at least 14 calendar days in advance</a>. 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.</li> <li>• You can only be reimbursed for business portion of your travel; <a href="#">personal travel</a> expenses will not be included. (<a href="#">Combining Business and Personal Travel, Bringing a Personal Guest on a Business Trip</a>)</li> <li>• Attach a coach class <a href="#">fare comparison</a> if one of the following applies: <ul style="list-style-type: none"> <li>○ If your itinerary includes <a href="#">personal travel</a> alongside business obligations</li> <li>○ 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)</li> <li>○ If you drove your personal vehicle to your business-related destination instead of flying <ul style="list-style-type: none"> <li>▪ (Typically you do <i>not</i> need a coach-class airfare comparison when the traveler chooses to <a href="#">rent a car</a> and drive.)</li> </ul> </li> <li>○ You upgraded when the length of the flight is less than <a href="#">eight hours</a></li> </ul> </li> </ul> <p>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. If a comparison wasn't obtained then, a new one may be accepted if:</p> <ul style="list-style-type: none"> <li>○ The travel dates are at least 14 days in the future as this timeframe typically yields more economical fares.</li> <li>○ The comparison is pulled from Lightning</li> <li>○ The departure and return dates match the original business trip</li> </ul> <p>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.</p> <p>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.</p> <ul style="list-style-type: none"> <li>• <b>CTP Price Matching</b> - If you find a lower fare for the same flight and class on an airline's website, CTP can often price match <b>before</b> you book. Just follow these steps (see <a href="#">CTP Price Match Guide</a>): <ul style="list-style-type: none"> <li>○ Compare both the Lightning confirmation page and the airline's final price (for the same flight and fare class)</li> <li>○ Call a CTP agent at 877-804-3688 (Option 2) OR</li> <li>○ Email your screenshots and flight details to <a href="mailto:na.pricematch@ctptravelservices.com">na.pricematch@ctptravelservices.com</a></li> </ul> </li> </ul>
Registration	<ul style="list-style-type: none"> <li>• Documentation support (e.g., conference agenda, program, invitation, etc.) is required (see <a href="#">CoE Travel and hosting Policy</a>).</li> </ul>
Lodging ( <a href="#">Max \$400/night</a> )	<ul style="list-style-type: none"> <li>• Itemized hotel folio or receipt is required for reimbursement.</li> <li>• <b>Standard Accommodations:</b> Typically a standard room in a commercial hotel or motel.</li> </ul>

	<ul style="list-style-type: none"> <li>○ Provide a valid reason for choosing AirBnB instead of hotel.</li> <li>○ If you purchase lodging from an Airbnb (individual), an W9 may need to be completed by the Airbnb /individual and payment processed thru UM People Pay. See People Pay Decision Tool at <a href="https://peoplepay.umich.edu/">https://peoplepay.umich.edu/</a>. AirBnBs and VRBOs usually include a high cost "cleaning fee" that should be considered when doing the cost comparison. As of 12/1/2021, the University will reimburse the cleaning fee as an allowable expense.</li> <li>○ 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.</li> <li>● <b>Shared Accommodations</b> <ul style="list-style-type: none"> <li>○ If sharing a room with another U-M traveler, only the individual who pays may claim reimbursement.</li> <li>○ If sharing with a non-U-M traveler, only the portion attributed to the U-M traveler is reimbursable.</li> </ul> </li> </ul>
<a href="#">Ground transportation</a>	<ul style="list-style-type: none"> <li>● The University generally does not pay for: <ul style="list-style-type: none"> <li>○ Transportation for <a href="#">personal errands or travel meals</a></li> <li>○ 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)</li> <li>○ Local parking/tolls <ul style="list-style-type: none"> <li>▪ <b>Local parking</b> and when it is allowable for an <b>employee</b>: 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 like parking and commuting costs not reimbursable</li> </ul> </li> <li>○ Commuting costs (e.g., the costs associated with driving a car between home and the normal place of work or business)</li> </ul> </li> <li>● For four or more ground transportation receipts or trips, the purpose, place of origin and final destinations should be provided for each trip.</li> <li>● 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.</li> </ul>
Rental car and Fuel	<ul style="list-style-type: none"> <li>● Fuel can only be claimed for University vehicles and rental cars. (Fuel for personal vehicles is included in personal car mileage (see below).)</li> <li>● 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.</li> <li>● Travelers should decline all collision insurance (<b>CDW (Collision Damage Waiver)</b>, <b>LDW (Loss Damage Waiver)</b> 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.</li> </ul>
<a href="#">Mileage</a> (effective 1/1/24)	<ul style="list-style-type: none"> <li>● Provide the place of origin and destination and indicate if mileage is roundtrip.</li> <li>● 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.</li> </ul>

<p>\$0.70/mile, includes fuel)</p>	<ul style="list-style-type: none"> <li>When claiming mileage in lieu of airfare, a <a href="#">coach class fare comparison</a> 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. <ul style="list-style-type: none"> <li>For a short trip like 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.</li> </ul> </li> <li>Mileage <b>exceptions</b> 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 <a href="#">Audit Exception Request Form</a>.</li> </ul>
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#### For assistance, contact:

- Graduate Students and Guests**, contact Lourdes Jorgensen ([jorgenl@umich.edu](mailto:jorgenl@umich.edu), 734-763-6043)
- Undergraduate Students**, contact Shelley Fellers ([sfellers@umich.edu](mailto:sfellers@umich.edu), 734-764-2383)
- For the status of your reimbursement**, contact the SSC ([eForm](#), [sharedservices@umich.edu](mailto:sharedservices@umich.edu), 734-615-2000 option 3, 1)

#### Helpful Training Videos and Resources

- CoE Training Presentation on Travel & Expense (TE) System: [https://drive.google.com/file/d/1IA3JO4QU\\_oi1xNdN8Dv55\\_gVmhavayfN/view](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](https://teamdynamix.umich.edu/TDClient/40/Portal/Requests/TicketRequests/NewForm?ID=7SfdOn4alBU_&RequestorType=Service)
- Allowable Expense: <https://teamdynamix.umich.edu/TDClient/68/Portal/KB/ArticleDet?ID=8557>
- 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://maisinc.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/>