

Post-Travel Review Checklist

Not a Required Travel Document

Audience:

Operations manager or designee

Purpose:

The operations manager or designee should review the travel payment request to ensure that the Research Foundation's (RF's) travel policy requirements and sponsor policies have been followed. The review should include, but not be limited to, the following items:

The travel was appropriate to the project or the RF.
Sponsor approvals, if required, were obtained.
For reimbursement of both meals and lodging, the distance traveled, as defined in travel status, was greater than 35 miles from the traveler's home and official station.
Sponsor restrictions on travel have been observed. Does the sponsor's travel policy take precedence?
Transportation was by common carrier and via the most direct route. If other than common carrier was used, the best interest of the project or the RF was served.
For all modes of transportation, original receipts, where required, are attached, and justification for other than coach accommodations is provided. For personal or rental car, the mileage is accurate and the current IRS mileage rate is used. Individual methods of travel have different documentation requirements.
If NYS taxes were paid and a tax exemption was not obtained, justification is attached.
If payment is requested for overnight lodging or meals, the traveler actually stayed overnight and was eligible for meals.
All maximum reimbursements and allowances have been observed and all calculations are correct.
All air travel on federal grants complies with the Fly America Act .
All expenses comply with RF and campus travel policies.

Feedback

Was this document clear and easy to follow? Please send your feedback to webfeedback@rfsuny.org.

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