



Submitting Reimbursement Requests

- While it is up to each unit to determine operational details, the FSC recommends that individuals complete their own reimbursement forms. To ensure forms are correctly filled out and appropriate documentation is present, individuals seeking reimbursement will usually submit their completed forms to an administrative staff member for review. Budget manager signature is always required.
- Travel expenses may only be submitted for reimbursement after travel has been completed. Per IRS requirements, reimbursement requests received later than 60 calendar days after completion of the trip must be treated as taxable to the traveler. Expense reimbursement requests are treated as taking place within a reasonable period if the traveler submits a request for reimbursement that is adequately supported within 60 calendar days of completing a trip, or before the end date of the grant if travel is being charged to a Sponsored Program, whichever is sooner.
- Reimbursement requests submitted later than 60 days after the end of the related travel are not guaranteed, and if paid such amounts must be treated as taxable income. The campus Chief Financial Officer or other designee has the last say in such matters. For PSU, these individuals are Laurie Wilcox, Assoc. VP for Finance and Administration (primary) and Tracy Claybaugh, VP for Finance and Administration (secondary).
- All reimbursement requests should be submitted using the USNH Personal Reimbursement Form (formerly referred to as the Travel Expense Voucher, or TEV), available on the Financial Services Center website at <https://campus.plymouth.edu/financial-services/financial-service-centers/forms/>. Other forms, such as the PSU Non-Travel Reimbursement form and the PSU Non-Employee Reimbursement form, should no longer be used.
- Please use the version of the reimbursement form available on the FSC forms page, as versions saved in other locations may not be current.
- **We recommend that individuals planning to travel on university business review the USNH travel policies located at <https://www.usnh.edu/usnh-financial-services-policies-and-procedures/07-travel> before making travel arrangements.**
- The business purpose of your expense must be fully documented in the field provided. For information on what constitutes an adequate description of business purpose, please see the information located at <https://www.usnh.edu/usnh-financial-services-policies-and-procedures/07-004-travel-expense-reimbursement>.

- All reimbursement forms require two levels of signature: 1) the traveler, and 2) the travel approver (the unit budget manager (for academic programs, this is the academic unit budget manager)). If grant funding is used, the grant administrator in OSP should also sign under “Sponsored Programs (If Applicable)”. Since federal grants may be subject to federal travel policies, it is best to consult with the grant administrator in the Office of Sponsored Programs before initiating grant-funded travel. If the traveler is also the budget manager, the person they report to should sign under “Travel Expense Approver.”
- Fully completed and signed reimbursement forms, together with documentation, should be submitted to the appropriate FSC.
- The FSC **no longer requires original copies of receipts** – you may scan and e-mail your submission to your FSC e-mail address.
- USNH policy requires that you keep a copy of your fully signed form and the accompanying documentation (including original receipts) and retain it until you have received your reimbursement.
- Receipts are only required for employee-paid expenses greater than \$25.00. Make sure you save your receipts for purchases of \$25.01 or more. We are unable to reimburse you for purchases over \$25.00 without a receipt.
- We strongly encourage travelers to use the per diem reimbursement method for meals. Links to US and international per diem rate charts are available on the FSC Resource web page located at <https://campus.plymouth.edu/financial-services/financial-service-centers/travel/>. Please make sure you are looking at the meals and incidentals rate located in the far-right-hand column of the chart – not the max lodging rate (which is much higher).
- You may not “mix and match” actual expenses and per diem reimbursement on any given trip. You must choose one reimbursement method for the entire trip.
- If you are requesting reimbursement for a business meal with yourself and one or more others, please use the “Business Expenses” section of the form and include detailed information, including date, restaurant name and location, names of those who attended, and business purpose of meal. Make sure you obtain an itemized receipt showing what was ordered and documenting that no alcohol was purchased.
- If you are traveling to a conference, please submit a copy of the conference schedule or program (**we don’t need the entire program**, just the portion showing the overall conference schedule). If meals are included as part of the conference registration fee, USNH does not allow us to reimburse you for the cost of an alternative meal if you decline to participate in the conference-provided meal.

- If you are requesting reimbursement for mileage, please use the mileage charts available on the FSC Resource web page located at <https://campus.plymouth.edu/financial-services/financial-service-centers/travel/>. If your route is not covered by these standard mileage charts, please use MapQuest or another application to document the distance traveled.
- If you are receiving mileage reimbursement for use of your personal auto, auto-related expenses such as fuel or roadside assistance are not reimbursable (although tolls are).

Step-by-step instructions for completing the personal reimbursement form are available at <https://www.usnh.edu/usnh-financial-services-policies-and-procedures/07-120-instructions-completing-travel-reimbursement>. Some general advice:

1. Make sure you click on “enable content” before attempting to complete the form.
2. Please leave the INV# field blank. The FSC will add an invoice number when we process your reimbursement.
3. Use the “tab” function on your keyboard to move through the form.
4. You must check the “PSU” box at the top of the form for the current mileage rate to appear.
5. Enter one date for departure and one date for return – this will auto-populate the dates in the “Employee Paid Expenses” section.
6. If you are documenting multiple trips for the purpose of mileage reimbursement, enter the first date of travel as departure and the last date of travel as return. Document each date on which you incurred mileage in the mileage section.
7. You don’t need to break out expenses such as lodging or auto rental to arrive at a per-day amount. Simply enter the total on the day you paid the expense.
8. Use the “Add Mileage Lines” and “Add Bus. Exp. Lines” buttons if you need additional lines to document expenses.