a2 National Symposium: Empowering Innovation in AI/Tech + Aging
March 19-20, 2024 | Smilow Center for Translational Research
University of Pennsylvania | Philadelphia, PA

<u>Travel Reimbursement Guidelines for Attending NIA RCCN Sponsored Meetings</u>

It is our intent to allow for adequate, comfortable accommodations for those traveling and seeking reimbursement through the RCCN. *Please review these guidelines carefully.* The RCCN is funded through federal funds and we must ensure that all reimbursement requests follow the guidelines below.

All receipts and forms for reimbursement must be submitted within 30 days of the end date of travel. Once the correct forms have been submitted, please allow *a minimum* of one month to receive reimbursement, it may take longer if the request is not submitted correctly. Note that <u>reimbursement payments will be issued by Wake Forest School of Medicine</u>.

It is expected that you will use discretion and good judgment in spending grant funds. Use of first/business class sections of airplanes/trains/buses, resort hotels, luxury restaurants, and items of like nature are considered to be a luxury, lavish or extravagant by the IRS. As a result, we do not allow or reimburse for such expenses.

The lowest-cost, reasonable, economy-class, commercial, domestic air/train/bus fare must be used. If the event is cancelled by the organizers, non-refundable travel costs will be reimbursed.

Reimbursement for use of personal auto cannot exceed economy airfare. Please seek approval from RLA for any economy-class airfare costing more than $750. Please contact Amanda Curran (amanda.curran@roseliassociates.com) to get approval in advance for the following situations:

- The best airfare you can find is over $750
- You want to book an itinerary that does not originate and return to your home city
- You want to fly into a different airport than the one closest to the meeting (PHL)
- You want to book upgrades to business or first class
- You want to drive instead of fly and need to know the allowable, reimbursable amount for mileage

Examples of Non-Reimbursable Expenditures: charges for traveler's checks, valet, personal entertainment and recreation, snacks and any type of rental car insurance. Please note that we cannot reimburse payments made with airline miles, gift cards or other in-kind transactions.

After your travel, please complete and return the following documents:

- A completed W9 (Rev. Oct. 2018) that includes your legal name, address where your check should be mailed, social security number, signature and date.
- A New Supplier Form with the Supplier/Individual Information completed. If you would like to receive your reimbursement via direct deposit, fill out the second page and include a voided check. Otherwise, you will receive your reimbursement via check.
- A completed Expense Reimbursement Form along with accompanying receipts.

Receipts: Tape Original Receipts on 8½ x 11" paper and scan them and email them along with your completed expense form and W9 to Amanda at amanda.curran@roseliassociates.com. Receipts submitted should include (but not be limited to) the following:

(a) Travel Cost – Plane, Train, Bus, Taxi/Uber/Lyft (Please note: Tips for ground transportation cannot

exceed 15% of total)

(b) Local Transportation Cost – Parking, Rented Automobile

(c) Hotel (up to three nights)

(d) Miscellaneous Items (baggage fees)

Please note, for air/train/bus travel costs, we must receive a receipt for the purchase of the tickets that includes record of payment. We cannot accept an itinerary for the trip as a receipt.

Mileage: List the number of miles driven each day when personal vehicle is used. Reimbursement rate can be calculated by multiplying the number of miles driven by the current federal rate ($.67/mile). Please provide the start point and destination addresses when submitting a mileage reimbursement request.

Registration Fee (up to $250): Submit a copy of your paid registration confirmation with your completed reimbursement form.