

UNIVERSITY GUIDELINES FOR MEDICAL STUDENT TRAVEL REIMBURSEMENT

The purpose of the reimbursement must be to present your research at a national meeting. Students must submit the [Travel Reimbursement Request Form](#) with required supporting documentation within 10 business days of travel.

Receipts submitted more than 10 days after travel will not be reimbursed. If your name is not on the receipt and/or credit card statement, it cannot be reimbursed.

Note, sales tax is not a reimbursable expense.

Supporting documentation includes:

- OSR travel award letter approving the travel
- A completed and signed Travel Expense Report Form
- Receipts
- Proof of payment
- A conference brochure, itinerary or letter of invite, listing the date(s), location, and purpose of the event. A PDF copy of all original, itemized receipts*, via the Qualtrics [Travel Reimbursement Request Form](#).

*Please Note: A copy of original, itemized, and dated receipts must be submitted with request for reimbursement or **claim will be denied**. If any receipt provided does not include both the student's name, and vendor's name, a corresponding credit card statement showing the student's name, address, and corresponding charges **must be** provided. Any information on the credit card statement not related to the reimbursement request can be redacted.

Third-party expenses cannot be reimbursed. This means that all reservations must be made in your name and paid for using a credit card in your name. OSR is unable to provide reimbursement for expenses related to conference travel paid by your parents, family members, friends, mentor, or any other third party. Additionally, payments made through Venmo, PayPal, Zelle, or similar methods to these third parties, cannot be reimbursed by OSR.

If you are sharing an expense (lodging, meals, etc.), you must provide a receipt for only your portion of the expense for reimbursement. For example, if you shared lodging costs, the hotel should be able to print a receipt for your portion of the expense.

Air Travel

Students are expected to select air travel within the basic least expensive unrestricted accommodations class offered by commercial airlines, consistent with business requirements. The University acknowledges that commercial airlines vary in their ticketing structures and do not necessarily offer consistent services in single fares. Therefore, Yale considers "air travel within the basic least expensive unrestricted accommodations class offered by commercial airlines, consistent with business requirements" to mean airfare within the basic cabin class (i.e., equivalent of "economy" or "coach," regardless of the specific airline's name for this class) that is consistent with business requirements.

[Procedure 3301 PR.03](#), Air Travel on University Business, expands upon this expectation and details the specific rules, guidelines, and processes applicable to air travel on university business (including additional requirements for air travel funded by sponsored awards). Direct flights are often significantly more expensive than flights with connecting service and students are encouraged to consider this aspect when making their plans.

Ground Transportation

A. General Principles of Ground Transportation for University Business

Students are expected to select ground transportation that is reasonably priced, consistent with business requirements. For example, when complementary shuttle services (e.g., from a hotel) are available and practical, students are strongly encouraged to use such services.

Yale does not cover the cost of any purchased roadside assistance package or personal property insurance coverage. Such expenses, if purchased, are personal to the traveler.

B. Use of Personal Automobiles

Students may use their personal vehicles for business purposes. The use of a personal vehicle for University business will only be reimbursed at the federal mileage allowance rate for business travel, published in the Controller's Office Fact Sheet. This rate covers the cost of vehicle usage, including gasoline; the student will not be reimbursed separately for gas expenses. Students will, however, be reimbursed for tolls and reasonable parking fees.

If students use their personal vehicle for business travel, documentation of business miles must include the business purpose for the travel and the number of miles driven. **Note:** personal vehicle reimbursement is limited to no more than the cost of a comparable trip's air travel within the basic least expensive unrestricted accommodations class offered by commercial airlines, consistent with business requirements.

If a personal vehicle is used for business purposes primarily for the traveler's convenience and results in a higher cost than other modes of transportation, reimbursement will be limited to the lower of the following:

- cost of the air travel within the basic least expensive unrestricted accommodations class offered by commercial airlines, consistent with business requirements, between the nearest commercial airport serving the origin and destination cities; or
- cost of train fare within the main cabin class (e.g., economy, coach) that is reasonably priced, consistent with business requirements, between the nearest passenger station serving the origin and destination cities.

The University assumes no liability for any loss or damage to the employee's vehicle. If an accident occurs when a traveler is using a personal vehicle for business travel, the employee's personal automobile liability and physical damage insurance is primary.

C. Rental Cars*

When renting a vehicle for University travel, students are expected to rent a reasonably priced vehicle (e.g., compact or midsize passenger car), consistent with business requirements. [Read more about Yale's car rental policy](#) to find a list of Yale's preferred car rental vendors, as well as domestic and international car rental insurance.

*Car rental requires pre-approval by OSR. Any student considering renting a car for conference travel must contact osr.med@yale.edu in advance. Any student that does not contact OSR and obtain preapproval may have their reimbursement denied.

Train Travel

Students using train service should book train fare within the main cabin class (e.g., economy, coach) that is reasonably priced, consistent with business requirements. Students should book train service on Metro-North, or Amtrak, consistent with their business needs.

Lodging

Lodging is an appropriate business expense for multi-day travel beyond 50 miles from a regular work location. The University does not pay for lodging related to single-day travel within 50 miles of a regular work location.

Students are expected to select a reasonably priced hotel room with a single occupancy rate. Students are permitted to use Airbnb for lodging. When using Airbnb, students are expected to select an option that is comparable in cost to a reasonably priced hotel room with a single occupancy rate in the same locale.

Individual Meals

Students may be reimbursed for the cost of their reasonable meal expenses while traveling on University business. All meal expense receipts must be itemized, or the claim will be denied by the Office of Student Research.

Documentation

Original itemized receipts (**not confirmation of reservation**) in the name of the student* being reimbursed are required for all reimbursements processed through Accounts Payable. Receipts may be scanned and emailed as a single, combined, PDF file as stated in the Travel Reimbursement Request Form. For travel expenses, the reimbursement request must establish the following elements of each expense:

- Date
- Place
- Amount and essential character of the expenditure

*If any receipt provided does not include the student's name, a corresponding credit card statement showing the student's name, address, and corresponding charges **must be** provided. Any information on the credit card statement not related to the reimbursement request can be redacted.

Copies of original itemized receipts must be submitted for the following travel expenses:

- **Major mode of transportation:** For air travel, the passenger receipt must include the traveler's name, the airline carrier, the date of purchase, and the last 4 digits on the student's credit card.
- **Lodging:** The original itemized hotel receipt. Note that if the student is sharing the room, an itemized receipt showing only the student's portion of the hotel room payment should be submitted.
- **Personal meals:** Students must present itemized receipts for meal expenses.

Non-reimbursable expenses

Non-reimbursable expenses include, but are not limited to: car rental (unless preapproved by the Office of Student Research), child care, pet care, in-room alcoholic beverages, gym and recreational fees, laundry or valet service, personal grooming services, car rental insurance, dues, lost baggage, lost or theft of cash advance money, personal funds or property, parking tickets or traffic violations, meals for spouses/guests, or travel-related expenses for spouses/guests.

NOTE:

Expenses that are reimbursed based on the conditions set forth above are not treated as income to the individual and generally will not be subject to tax withholding or reporting. If an expense does not satisfy the conditions set forth above, but is reimbursed, the amount may be reported as taxable income and subject to tax withholding and/or reporting.