The HTIC expense guidelines were designed to help you document all your expenses in accordance with Internal Revenue Service regulations. The expense guidelines will help all of us to keep costs within reasonable limits and to follow consistent reimbursement procedures.

We strongly encourage you to familiarize yourselves with the guidelines and with the entire reimbursement policy HTIC has adopted, in order that you not be unpleasantly surprised upon receipt of reimbursement checks.

Reimbursement requests relating to participation in HTIC events or related activities must be submitted on an Expense Statement (T-5 form), without exception, to the Assistant Director, Angela Schoepf. If you are unable to download or print this form, please contact the HTIC office so that we can fax you the form.

Original itemized receipts must be submitted to support all expenses other than tips and personal auto mileage. No expenses will be reimbursed unless they are properly documented.

Please note that expenses for spouses or guests are not covered by HTIC. We strongly recommend that you make photocopies of the T-5 form and all receipts that you forward to HTIC via U.S. mail, since the documents can be lost.

All requests must be submitted within 15 days from the last date expenses were incurred for the specific meeting or event. HTIC reserves the right to disallow any claims not submitted in a timely manner. Also, the mailing address noted on the form must be your home address, not that of your school/institution.

Please provide sufficient detail to clearly establish the business purpose for each expenditure submitted for reimbursement. This includes:

- The business transacted or discussed
- The participants and their business affiliations
- Where the expense was incurred
- The dates involved

When submitting expenses incurred in foreign currency, the rates should be those in effect at the time of the transaction, not those in effect at the time the T-5 form is completed. The person submitting the expenses is responsible for converting foreign currency to United States funds on the T-5 form. The website to be used for making these conversions is www.oanda.com/convert/classic.

Lodging

Reimbursement is limited to the rate for single occupancy accommodations at moderate rate hotels or (for convenience) at hotels hosting the conference or seminar attended. These are some suggested moderate rate hotels:
• Comfort Inn
• Courtyard by Marriott
• Fairfield Inn
• Hampton Inn
• Red Roof Inn
• Wingate Inn

Try to find the most economical rate per night. The maximum rate we will cover is $150, including taxes, however, if you can find a more economical rate we would appreciate these efforts.

Hotel charges for nights preceding or following the meeting or conference dates are not reimbursable except when early arrival or late departure is made necessary because of flight schedules or when a longer stay results in a reduction of airfare which is greater than the cost of the additional lodging and meals.

HTIC will not cover alcohol, snacks, health clubs, mini-bars, room service (unless it is needed due to illness or late arrival at the destination, and itemized receipt is required for reimbursement), telephone use, or in-room movies. When using the service of a bellhop, the tip per piece of luggage should not exceed one dollar. Also, regarding the hotel housekeeper, a tip of one dollar per day may be left for each person in the room.

When requesting reimbursement, the original itemized hotel bill and the original receipt showing proof of payment must be attached to the T-5 form. Credit card receipts, on-line reservations, or other statements showing only the total cost of lodging do not provide adequate documentation for all hotel charges. IRS regulations require that lodging receipts indicate all of the following:

• Name and location of the hotel
• Date(s) of stay
• Separate amounts for expenses such as lodging, meals, telephone calls and other charges.

Please keep in mind that personal toiletry needs, medicine, newspapers and other incidentals are not reimbursable.

**Meals**

HTIC will only cover meal expenses at the airport or at a hotel if your arrival or departure times are delayed. The amounts allowed are $8 for breakfast, $12 for lunch, and $25 for dinner, and as mentioned above, HTIC will not reimburse for coffee or water unless they are part of a meal, snacks unless they are in lieu of a meal, or alcohol. The original receipts you submit are to contain a breakdown of the meal (not just credit card vouchers), and the tips cannot exceed 15% of the total bill. For hotel meals where an 18% gratuity is automatically added to the check, additional tips should not be made, as these expenses will not be reimbursed.

When meal expenses include charges for individuals other than the traveler, the receipt must state the name(s), the business purpose(s), and the date of the meal.
Meals will not be reimbursed when meal service, including Continental breakfast, is provided as part of the meeting agenda. Conference packages, which include meal costs, must be fully disclosed on expense reports. Any overlapping meal costs incurred over the same period of time are not reimbursable unless necessitated by illness or late arrival at the destination.

Transportation

Please note that for HTIC sponsored events, our commitment is to reimburse your for transportation costs to/from the event, with your point of origin being your place of residence. If you will be traveling to an HTIC event arriving from someplace other than your place of residence, or if you will be traveling to another destination after the HTIC sponsored event, HTIC will cover the cost of transportation from/to your place of residence, and you will be required to cover the difference. If, however, the cost of transportation expenses for departing from or traveling to a city other than your place of residence is less, HTIC will reimburse you for the lesser amount.

Air Travel

For trips of significant distance, air travel should be utilized whenever possible via the most direct and/or economic route available to the major airport nearest the final business destination. All reservations should be secured at least one month prior to the trip, via our travel agent, Graycar Travel. Please contact Sue Flaherty at 609-587-0306 or 1800-755-5514, providing her with your preferred travel dates/times. She will forward to us an itinerary that we will authorize, usually within 24 hours of receiving the itinerary, for purchase with our credit card. Fares over $500 will receive special attention, and may require more time to authorize.

When parking at airports, reimbursement for daily parking fees will be limited to the cost of economy long-term parking. “Short-term” parking should only be used when an airport stay does not exceed four hours

Surface Transportation

Whenever possible, complimentary/courtesy shuttles typically provided by hotels should be used.

When arranging transportation from and to the airport for a group, please check if the renting of a charter bus is less expensive than individual reservations. When expenses for cab fares or car mileage are submitted, these must be accompanied by a Mapquest search. Travel by private automobile will be reimbursed at the IRS per-mile rate (currently @ $0.54 U.S. per mile). This per-mile rate includes the overall cost of operating an automobile for local travel or transportation away from home, including such items as gasoline, oil, maintenance, repairs, etc. Properly documented parking fees and tolls will also be reimbursed. Use of electronic toll collection systems should be documented by submitting a copy of the monthly statement (generally available on the Internet).

When traveling by car, please ascertain that the reimbursement to be collected for mileage will be less than that of air travel. If, for some reason, you find that you still prefer to travel by car, please note that we can reimburse you only for the amount that would be paid for traveling by air. In order for you to determine this, and for us to establish the amount we will reimburse, please search the Internet for flight reservations for the corresponding dates, and attach a copy of the lowest rate/itinerary found.
The cost of traffic violations, parking tickets, towing charges or associated court costs will not be reimbursed.

Please note that the maximum amount for cab tipping is 10% of the fare total. When traveling by train between New York City and Princeton, please buy tickets for NJ Transit instead of Amtrak, as the latter is approximately $60 more expensive, and make sure that you get a printed receipt. For transportation from your home to local airports, we ask that if possible, you take public transportation. If this is not feasible, we ask you to compare the price of a cab ride and the price of mileage and parking for leaving your car overnight at the airport, choosing the less expensive of these two options. The total expense reported for transportation by a personal vehicle may not exceed the equivalent allowable economy airfare travel.

Cars should be rented based upon a demonstrated need (i.e., no public transportation is available, visiting several locations is required, etc.) and rental must be pre-authorized by appropriate HTIC staff to be considered reimbursable. Collision Damage Waiver (CDW) may be taken, but all other insurance coverage is declined. Reimbursement for auto rental related expenses must be submitted with the T-5 form, attaching the original receipt and/or contract, which reflects that payment was made, or a copy of the credit card statement showing the expense incurred for this purpose. The cost of gasoline is reimbursable (receipts required) when renting. A rental vehicle must be returned with a full gas tank to avoid the typical excessive (and non-reimbursable) fuel costs charged by rental agencies.

Rail travel will be reimbursed at the cost of standard coach/economy accommodations. Reimbursement will generally be limited to the lesser of the cost of the rail ticket or the cost of a fully discounted airfare to the same destination, although exceptions can be made in the event that rail travel saves considerable time and/or other ground transportation costs.

*Effective date January 1, 2016 until further notice.*