Reimbursable Expenses Related to All Travel

All expenses posted to an account must stay within the purpose and intent of the funding source. Business purposes for those expenses should specifically state why the expense was charged to the fund source and the benefit of the travel to the funding source. All costs must be reasonable, allowable, appropriate, and properly documented to be reimbursed to the traveler. **It is the responsibility of the traveler to document the benefit, not the staff person processing the travel.**

Documentation of Sponsored Programs Travel

Taking direction from the ISU Allowability and Appropriateness Guide, travel costs incurred [on sponsored funds] must provide benefit to the sponsored program to which they were charged. The benefit must be documented for employee travel reimbursements and conference registration fees. Travel or conference expenditures may be deemed unallowable if unable to establish a specific project related business purpose for the sponsored travel on that specific award.

How to document the benefit to the sponsored program:

- The traveler or PI should provide to the verifier the WHY of the expense, which should include the benefit to the sponsored program.
- The purpose and benefit should be noted in the Justification/Description section of the Employee Reimbursement system or the Business Purpose section of the p-card system.
- The Purpose selected from the drop-down menu on the Travel Dates/Purpose section of the Employee Reimbursement system should directly correlate to the activity type and scope of work of the sponsored funding. (i.e. Research/Scholarship, Public Service/Outreach).
- The traveler should confirm their reimbursement in the Employee Reimbursement system, which states “If you select Confirm, you are certifying that the expenses you are submitting are true and accurate, and that no other organization is paying for the expenses.”
- **Key words or phrases that clearly indicate WHY the expense was necessary and HOW it benefits the sponsored program should be used.** These may include, for example:
  - Disseminate research results
  - Collaborate with researchers
  - Attend required project meetings
  - Share new research developments
  - Expand knowledge in field of expertise

**Examples of Business Purposes Indicating Benefit to Sponsored Program**

<table>
<thead>
<tr>
<th>Strong Business Purposes</th>
<th>Poor Business Purposes</th>
</tr>
</thead>
<tbody>
<tr>
<td>“to disseminate results of the research on NSF Android Malware project”</td>
<td>“2015 Software Conference” – missing the WHY and HOW it benefits the project</td>
</tr>
<tr>
<td>“to learn best practices for management of the grant as key personnel per operating plan”</td>
<td>“professional development” – missing the HOW it benefits the project</td>
</tr>
<tr>
<td>“required PI meeting with sponsor per program guidelines and project budget narrative”</td>
<td>“to meet with sponsor” – missing the WHY and HOW it benefits the project</td>
</tr>
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</table>