



Lodging and Meal Expenses

Purpose

This series of documents sets forth the Research Foundation (RF) policies and methods for reimbursement of lodging and meal expenses related to domestic travel.

Applicability

In order to be reimbursed for both meals and lodging, a traveler must be in official travel status, i.e., at a distance greater than 35 miles from both the traveler's official station and place of residence. Travelers may be reimbursed for lodging and meals on weekends and holidays while in travel status.

Documentation Requirements

Travel Payment Request Form

Travel expenses must be documented on the [Travel Payment Request Form](#) or an equivalent form developed by the operating location. This form is available from the Forms resource area in EPSS. Locations should not use SUNY travel forms. Location-specific forms must contain the same information as is in the Travel Payment Request Form.

Nonovernight Travel

When claiming a meal allowance payment or reimbursement for nonovernight travel, use the "Taxable Meal Payment Request and Authorization Form" (available in both [Word](#) and [PDF](#)) or an equivalent form developed by the operating location. This form is available from the Forms resource area in EPSS. Locations should not use SUNY travel forms. Location-specific forms must contain the same information as is in the "Taxable Meal Payment Request and Authorization Form."

Original Receipts

Use of receipts to document lodging expenses is dependent on the method of reimbursement used. Use of receipts to document meal expenses is not required.

At the discretion of the operations manager or designee, reasonable expenses may be reimbursed without receipts (e.g., in situations when a receipt could not be obtained or a receipt was lost). In such cases the traveler must provide a signed, written explanation that includes the amount requested for reimbursement, the type of expense, the date, and the reason why a receipt is not being presented.

[Meal Eligibility](#)

Eligibility for an allowance or reimbursement for breakfast and/or dinner is determined by the time of departure from the traveler's official station or home and the time of return to the traveler's official station or home, according to the following table:

On the day of departure, the traveler is eligible for...	if travel begins before...
breakfast	7:00 a.m.
dinner	6:00 p.m.
On the day of return, the traveler is eligible for...	if the trip ends after...
breakfast	8:00 a.m.
dinner	7:00 p.m.

Allowance and reimbursement rates are determined by the city to which the traveler travels in order to accomplish the purpose of the trip. No reimbursement will be made for lunch. *One meal allowance* is a combination of one breakfast and one dinner (or vice versa).

Example

Since meal eligibility is defined according to the times of departure and return, a traveler leaving for an overnight trip after 7:00 a.m. but before 6:00 p.m. and returning after 8:00 a.m. the next day will receive one full meal allowance consisting of one dinner and one breakfast. In this instance, if the traveler returns after 7:00 p.m., the traveler will be allowed one full meal allowance and reimbursement for dinner.

[Nonovernight Meal Payments](#)

When the traveler is in travel status for less than a full day and incurs no lodging expenses, reimbursement for breakfast and dinner will be made in accordance with the eligibility for meal requirements described in [Meal Eligibility](#), using the rates as listed in [Schedule 2](#).

However, under most circumstances, this reimbursement is considered *taxable income* by the Internal Revenue Service. See section on [Nonovernight Meal Payments](#) for more information.

[Methods of Reimbursement](#)

There are two methods to reimburse travelers for the cost of overnight meals and lodging.

- [Method 1](#), a per diem allowance, which reimburses lodging, meals, and incidental expenses without use of receipts

- [Method II](#), a modified per diem allowance, which requires receipts for lodging reimbursements. Receipts are not required for meals and incidental expenses (M & IE).

Travelers should choose one of these two methods. In some instances it is necessary to use both methods. In both methods, lunch is not reimbursable. The per diems include expenses such as tips to bellmen, hotel maids, etc.

Individual documents, [Method I \(Unreceipted Lodging\)](#) and [Method II \(Receipted Lodging\)](#), more fully describe each method, including examples of how each method is used.

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March 19, 2001	Updated links to forms and documents. Content of procedure NOT updated.

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