



Method II (Receipted Lodging)

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Purpose

This document describes the Research Foundation (RF) method of maximum *reimbursement for lodging and meals by requiring lodging receipts*.

Eligibility Requirements

To be eligible for Method II rates, these two criteria must be met:

- the traveler must be in [overnight status](#), and
- the traveler must save and *submit valid receipts for lodging expenses*.

Documentation Requirements

Original Receipts

Use of receipts to document lodging expenses is required. When a traveler is in overnight [travel status](#), lodging will be reimbursed at the actual cost, up to the maximum federal allowance ([see the GSA Web site](#)). Meal receipts are not required for meal reimbursements. All meals associated with overnight travel will be reimbursed at the federal per diem rate for the area of assignment.

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 located in the Forms resource section of EPSS. Locations should not use SUNY travel forms. Location-specific forms must contain the same information as the Travel Payment Request Form.

Tax Exemption Forms and Certificates

See the [Travel Within New York State](#) (NYS) section below.

Full Meal Allowance

To be allowed a *full* meal per diem, these two criteria must be met:

- the traveler must be eligible for both a breakfast and dinner as described in [Meal Eligibility](#), and
- the traveler must be in [overnight status](#).

When the traveler is in overnight travel status but is not entitled to the full meal per diem because of the meal eligibility requirements, the traveler will receive the amount for the meal that is not part of the per diem (i.e., breakfast or dinner). These rates are provided in [Schedule 2](#), in the section "Method II (Receipted Lodging) or Nonovernight Receipted Meal Expenses." Also, see [examples](#) in the example section.

Federal Per Diem Rates

The Research Foundation uses the U.S. General Services Administration (GSA) per diem rates to establish maximum reimbursement. These rates

- differ from state to state and city to city (destination determines a traveler's reimbursement rate).
- include all applicable taxes and [incidental expenses](#), such as tips to hotel maids and bellhops.
- are updated and [provided online by GSA](#).

Any amounts over the federal per diem rates must be approved by the operations manager or designee and must be documented as to why the rate is over the maximum. See [Example 1](#) below.

Rates for Alaska, Hawaii and Puerto Rico are established by the Department of Defense. [Official DoD Per Diem Rates](#) are available online from the Defense Technical Information Center but can also be accessed from the [GSA web site](#) related to Travel and Transportation Management Policy. These rates are subject to change monthly.

Travel Within New York State

The Research Foundation is exempt from NYS and New York City (NYC) sales and use taxes.

For travel within NYS, travelers should use the RF tax exempt certificate, "Exempt Organization Certification" ([ST-119.1](#)), to get exemption for all applicable taxes, including the NYC Hotel Room Occupancy Tax.

Note: A separate tax exempt certificate and letter are no longer required for NYC. Use the "Exempt Organization Certification" ([ST-119.1](#)) to claim all tax exemptions.

Although it is RF policy not to reimburse travelers for New York taxes, operating locations may use their discretion as to whether or not taxes will be reimbursed. Operations managers or designees must document the reason for this reimbursement. For RF policy on tax exemption, see [Tax-Exempt Status](#) in the Purchasing/Payment Manual.

Method II Examples

Example 1

A traveler goes to a conference in Boston. The conference is being held in a hotel with a rate of \$134 a night. The maximum lodging per diem for Boston is \$165. The over-the-maximum can be justified, because the traveler, staying at a different hotel, would have incurred additional transportation expenses to and from the conference.

(Note: This example uses 2006 GSA rates.)

Example 2

A traveler leaves Binghamton on Sunday at 4:00 p.m. and travels to NYC. The traveler returns to Binghamton at 9:00 p.m. on Wednesday.

Lodging: Beginning in 1999, the GSA separates allowances for the different boroughs of NYC, so you must be more specific than "NYC." In this case, the traveler stayed in Manhattan where the maximum lodging amount is \$212 per night.

Meal Allowances: The traveler is entitled to 3 full meal per diems and a dinner on Wednesday night (returned home after 7:00 p.m.). Manhattan is a \$64 per diem location.

(Note: This example uses 2006 GSA rates.)

For this example, the traveler will be reimbursed the following:

Three nights lodging @ \$212	\$636.00
Three full per diems @ \$64	\$192.00
Plus dinner on Wednesday	<u>\$ 52.00</u>

\$880.00

Date	History of Change
July 6, 2006	Updated dates and rates in the "Method II Examples" section.
October 25, 2004	Updated links to GSA travel website, and reformatted document.

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