

## **BLOUSTEIN SCHOOL POLICY**

Policy Name: TABERS

Originally Issued: July 1, 2008

### ***School Policy:***

The Dean will approve and sign all TABERS submitted by Center Directors and Faculty.

Prior to submission to Dean's office:

- All TABERS should have fund approval sign-off.
- All TABERS should be typed and/or entered in FACS.
- In cases when there are a large number of expenses, attaching a spreadsheet showing all of the details is helpful. The actual TABER can say, "see attached explanation/details" when you attach a spreadsheet.
- Original itemized receipts are required for all expenses.
- Completed checklist (see below) should be signed & submitted with TABER.

### ***Highlights of University Policy:***

- Travelers need to submit their TABERS within 60 days after their return to the work site. Both the approver and next higher-level approver must approve the TABERS submitted beyond the 60-day time period. A letter of explanation must be attached to the TABER and signed by the employee's supervisor.
- Travel miles should be calculated from Civic Square unless the employee's home is closer to the destination.
- Conference Registration Fees - A receipted bill or registration confirmation with fee noted and a copy of the fee sheet detailing the conference itinerary (or brochure) are required to substantiate the business purpose, the time period of the trip, and the amenities provided by the conference or meeting.
- Meal Expenses - Employees must submit itemized original receipts with proof of payment for all meals to be reimbursed up to \$60 per day unless the per diem option is chosen. No reimbursements will be given for meals while on official business in New Jersey, New York City or Philadelphia unless the cost of the meals is inseparable from the charge for a meeting, convention, or other event. In general, meals are not reimbursable unless the employee is in travel status, (travel for a period of at least 12 hours). When employees are not in travel status, meals are considered to be a personal expense and not reimbursable.

# TABER Submission Checklist

The university will reimburse reasonable, necessary, appropriate and approved travel and business expenses incurred in the performance of university business. All TABERS must include a **full explanation** of the rationale for charging the expenses (i.e. "to attend conference" or "to present findings" is NOT sufficient). TABERS must be submitted within 60 days of incurring the expense or after the return to the work site. Please refer to **University Policy 40.4.1, Travel and Business Meal Expense Policies & Procedures**.

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## Commercial Air

- Airline ticket receipt, e-ticket receipt, or detailed invoice/itinerary showing all times of departure, flight numbers, class of service, fare basis, ticket or confirmation number and proof of payment.
  - Passenger copy of the air ticket (boarding pass) should be attached whenever possible.
  - Proof of payment (i.e., credit card being charged)
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## Commercial Bus/Rail Fares

- Ticket stub or detailed receipt showing the fare.
  - Reasonable, actual cost. Business/First travel requires a business purpose to support additional cost.
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## Lodging

- Original receipted hotel or motel bill specifying rate, date(s) of stay, and evidence of payment.
  - Express checkout itemized receipt with the credit card being charged (conceal credit card number).
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## Car Rental

- Rental is limited to intermediate size vehicle.
  - Business justification required.
  - Rental contract AND original receipt.
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## Privately Owned Vehicle Mileage

- Starting/ending locations and dates.
  - Purpose of travel (note: "to attend meeting" is NOT sufficient).
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## Meal Expenses

- No reimbursement for meals provided by any other source.
  - Per diem option using University or IRS rate table (no receipts required).
  - Actual meal expense option when supported by original receipt with proof of payment.
  - \$60 daily maximum for actual meals supported by receipts.
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## Business Meeting Meal Expenses

- Itemized original receipts with proof of payment.
  - A full explanation of the business purpose for the meal, including topic of discussion.
  - List of participants (full names) with affiliation.
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## Registration Fees

- An explanation of the purpose for attending the conference/meeting.
  - A receipted bill or registration confirmation with the fee noted and proof of payment.
  - A copy of the fee sheet detailing the conference itinerary (or brochure) to substantiate the business purpose, the time period of the trip and the amenities provided by the conference or meeting.
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## Incidentals, Supplies, Misc. Expenses

- Goods or services personal funds purchases limited to \$500.
  - Business purpose of the expenditure.
  - Dated original receipts or invoices with proof of payment.
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## Currency conversion

- Currency exchange receipts, bank or credit card statement to validate the conversion process.
  - Oanda currency converter if exchange documentation is not available.
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## Translation

- Provide an English translation/explanation for all foreign language receipts.
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Signature of Reviewer

Date