

Travel Reimbursement Guidelines for Attending NIA RCCN Meetings

It is our intent to allow for adequate, comfortable accommodations for those traveling and seeking reimbursement through the RCCN. Please review these guidelines carefully. The RCCN is funded through federal funds and we need to ensure that all the reimbursement requests follow the guidelines below.

All receipts and forms for reimbursement must be submitted by June 27, 2025.

Once the correct forms have been submitted, please allow a minimum of one month to receive reimbursement, but it may take longer if the request is not submitted correctly. Note that reimbursement will be sent from Wake Forest School of Medicine, not AFAR. It is expected that you will use discretion and good judgment in spending grant funds. Use of First/Business Class sections of airplanes, resort hotels, luxury restaurants, and items of like nature are considered to be a luxury, lavish or extravagant by the IRS. As a result, we do not allow or reimburse for such expenses.

The lowest reasonable commercial airfare must be used. If we have to cancel the in-person meeting because of COVID-19, we will reimburse non-refundable travel costs.

Reimbursement for use of personal auto cannot exceed coach airfare. Please contact Kathy Berry (kathy.berry@roseliassociates.com) to get approval in advance for the following situations:

- the best airfare you can find is over \$750
- you want to book an itinerary that does not originate and return to your home city
- you want to fly into a different airport than the one closest to the meeting
- you want to book upgrades to business or first class

Examples of Non-Reimbursable Expenditures: Charges for Traveler's Cheques, Valet, Personal Entertainment and Recreation, Snacks and any type of rental car insurance. Please note that we cannot reimburse payments made with airline miles, gift cards or other in-kind transactions.

After your travel please complete and return the following documents to Colette Li (colette.li@roseliassociates.com):

- A [completed W9 \(Rev. Oct. 2018\)](#) that includes your legal name, address where your check should be mailed, social security number, and signature and date.
- A [New Supplier Form](#) with the Supplier/Individual Information completed. If you would like to receive your reimbursement via direct deposit, fill out the second

page and include a voided check. Otherwise, you will receive your reimbursement via check.

- A completed [Expense Reimbursement Form](#) along with accompanying receipts.

Receipts: Tape Original Receipts on 8 1/2 x 11" paper and scan them and email them along with your completed expense form and W9 to Kathy Berry (kathy.berry@roseliassociates.com). Receipts submitted should include (but not be limited to) the following:

- a) Travel Cost – Plane, Train, Bus, Taxi/Uber/Lyft (Please note: Tips for ground transportation cannot exceed 15% of total)
- b) Local Transportation Cost – Rented Automobile
- c) Hotel (up to two nights)
- d) Miscellaneous Items

Please note, for air travel cost, we must receive a receipt for the purchase of the tickets that includes record of payment. We cannot accept an itinerary for the trip as a receipt.

Meals & Incidentals: Show each meal separately, including tips in cost of the meals and individuals attending. Tips for meals cannot exceed 20% of pre-tax total. You must submit itemized receipts if you are claiming reimbursement for any amount and this should be used instead of the per diem. If alcohol is on a receipt, it must be subtracted from the total with a line through the charge. The tax on alcohol must also be subtracted. While there is no cap on this allowance, we ask that you use your judgement when selecting restaurants and meal options.

Mileage: List number of miles driven each day when personal vehicle is used. Reimbursement rate can be calculated by multiplying the number of miles driven by the current federal rate. Please provide the start point and destination addresses when submitting a mileage reimbursement request.