

## EXPENSE REIMBURSEMENT FORM INSTRUCTIONS

### Purpose:

Use the Expense Reimbursement Form to request reimbursement for any out of pocket travel, business or entertainment related expenses pertaining to Loyola University of Chicago (LUC) activity.

Individuals may charge against appropriate University accounts normal and reasonable travel, business and entertainment related expenses incurred for a University business purpose as it pertains to local transportation and out-of-town travel. These funds should be incurred to further the educational, research and public service mission of the University.

For clarification relating to policy and procedure, please refer to the LUC Policy governing travel and business expenses. Before making any commitments, an employee should be aware of his/her department's and/or sponsor's policies, as they may be more restrictive than those contained in the LUC policy. Appropriate departmental approval for all expenses should be obtained. No one may authorize an exception to these policies and procedures for his/her own expense.

### Preparation and Submission:

The Employee Expense Reimbursement Form is broken into multiple sections. If completed electronically (recommended), the form will guide you section by section.

1. **Personal Information:** Provide your full name, department, department address and telephone extension.
2. **Type:** Select the Individuals status as an LUC/SSOM Employee or a Non-Employee
3. **Time Period:** Provide the time period for which you are requesting reimbursement.
4. **Travel and Business:** If your time period is greater than 2 weeks, you will need to prepare multiple requests.
  - **Transportation:** Provide the amount of any transportation and select the type.
  - **Personal Auto:** For the use of a personal automobile for Loyola Business, enter the number of miles driven. The total dollars will automatically populate. Please note that the allowable mileage rate includes an allowance for gasoline, insurance and general wear and tear. No other amounts will be reimbursed for a personal auto use.
  - **Lodging:** Provide the lodging expenses, per day; including only room related charges (do not include room service or other non-room fees).
  - **Meals:** Enter your request relating to all meals. Please note that meals are reimbursed at actual cost and not on a per-diem basis. The form will not allow you to request an amount in excess of established allowance amounts. In addition, report in this section, only amounts related to personal meals. Reimbursement for entertaining guests should be reported in the Entertainment section of the request.
  - **Miscellaneous:** Enter any other miscellaneous travel or business expenses.
5. **Entertainment:** Enter any entertainment related expenses in this section making sure to include the date, the establishment, and the nature of business, a guest list, and the business affiliation of the guests.
6. **Expense Summary and Distribution of Expenses:** All expenses will be automatically totaled for this section. You will need to provide any issued advances in this section that will offset with the expenses incurred. In the event there is additional reimbursement due to you, provide the accounting unit and account. If the advanced funds were not spent in entirety, you must re-pay those funds to the University. Please select the re-payment method by attaching a personal check or requesting a Payroll deduction.
7. **Approvals:** Please print/type and sign your name and include the date of your request. The completed form including all supporting documentation (see policy) should be forwarded to your supervisor and budget administrator for review and approval.
  - **Supervisor/Budget Administrator Approval:** All requests should include appropriate supervisor and budget administrator approval and telephone extension.
8. **Comments/Remarks:** All requests should include detailed comments and remarks to clarify the nature of business for the requested reimbursement (i.e., name of conference or event, purpose of travel, etc.) or to indicate any special instructions. This information is critical for the support and validity of the request.
9. **Submission:** Complete forms, including all required supporting documentation, or questions should be directed to:  
Accounts Payable Department  
820 North Michigan Avenue  
WTC, Lewis Tower-Room 719  
(312)915-8748  
Accounts-Payables@luc.edu