

Pre-Travel Checklist

This form is intended to help you organize your travel documentation for compliance with sponsor requirements and federal regulations.

If you have any questions, please contact ORSP at 315-312-2888 or orsp@oswego.edu

You may also refer to the Research Foundation Travel Handbook:

https://portal.rfsuny.org/portal/page/portal/policies/travel_handbook.pdf

- ☐ Has ORSP been notified of your travels? A two-week advance notice on sponsored programs-related travel is required. Please call or email ORSP.
- ☐ Does the trip meet all Sponsor guidelines? Please review your award agreement.
- ☐ Are there sufficient funds to cover the cost of the trip? If you are unsure, contact ORSP.
- ☐ Is the trip within New York State? If so, understand RF's acceptable use policy (<http://goo.gl/nuenX8>) and obtain a "Tax Exempt Organization Certification" Form ST-119.1 from ORSP.
- ☐ Is a travel advance required? If so, contact ORSP.
- ☐ Does the traveler understand The Research Foundation as well as the campus policies regarding what expenses are reimbursable? If not, please contact ORSP.
- ☐ Does the traveler understand what documentation is required to obtain reimbursement?
 - Original receipts (Photocopies are not reimbursable)
 - Hotel Invoice/bill must reflect a zero balance and must be in the name of the traveler
 - No Meal Receipts are necessary, but obtaining the receipt of the last meal of trip may be beneficial to documentation for reimbursement
- ☐ Have you inquired on the federal per diem rates? If not, see <http://www.gsa.gov/portal/category/104711>
Hotel and meal reimbursements are based on the federal per diem. If expenses (such as hotel) exceed the per diem rate, make sure prior approvals are obtained and attach a written justification to the Travel Payment Request Form.
- ☐ Is travel to a foreign country? You should review sponsor regulations, award terms, and conditions prior to traveling out of the United States. Many sponsors have different requirements for foreign travel. Other things to consider are vehicle rental policy, additional medical insurance, and the Fly America Act.
See <http://goo.gl/owQFvR> or <http://www.gsa.gov/portal/content/103191>
Please be aware of the Federal Regulations on import and export controls. <http://goo.gl/GEI0sn>

Transportation

- ☐ Is a rental vehicle being used? If so, the vehicle(s) should be rented in the name of the Research Foundation. Please review RF's policies on rental cars, including Insurance Guidelines, in the RF Travel Handbook: https://portal.rfsuny.org/portal/page/portal/policies/travel_handbook.pdf
A written justification for the use of a rental vehicle needs to be attached to the Travel Payment Form.
- ☐ Has the most cost effective means of transportation been researched? For example, the use of a Car Rental vs. the use of your Personal Automobile. *The most cost effective means of transportation will be reimbursed.* Please attach a written justification to your Travel Form.
- ☐ Is travel on a federal grant and will the traveler be using a commercial airline?
If so, prior to booking an airline ticket, make sure the airline is a "U.S. flag air carrier" as described by the Fly America Act, see <http://goo.gl/owQFvR> or <http://www.gsa.gov/portal/content/103191>