

# Travel Expense & Reimbursements Information for Prospective Doctoral Students

## Stevens Institute of Technology Doctoral Recruitment Event 2024

### CERTIFICATION OF UNDERSTANDING

To be considered for potential reimbursement of travel expenses, you must read, sign, and return a copy of this agreement to Ryan Malenczak ([Rmalencz@stevens.edu](mailto:Rmalencz@stevens.edu)) before you book any travel and no later than February 16, 2024. **Failure to submit a signed copy of this agreement by the deadline will result in denial of reimbursement requests.**

### HOTEL ACCOMMODATIONS

Stevens has reserved rooms at the Sheraton Lincoln Harbor hotel for the nights of Thursday, March 21, Friday, March 22, and Saturday, March 23. Stevens will pay the hotel directly for the cost of your room on the nights indicated. At check-in, you will be required to provide the hotel with a credit card to cover the cost of any additional charges incurred during your stay, including incidental purchases and damage to the room. You are responsible for paying all additional charges incurred during your stay. Please Note: Participants who wish to arrive early or stay late do so at their own expense and must make their own separate reservations directly with the Sheraton.

### TRAVEL EXPENSE REIMBURSEMENT

In addition to covering the cost of your hotel room (see above), you may be eligible to have select travel-related expenses reimbursed by Stevens. Please read on for additional information about requirements, eligible expenses, and the reimbursement process.

### REIMBURSEMENT LIMITS

Stevens will reimburse up to a maximum of \$750 for participants traveling from within the United States and Canada and up to a maximum of \$1,500 for participants traveling from any other region.

### TRIP TIMING

Only expenses incurred for travel taking place between March 20-24, 2024 are eligible for reimbursement. If you wish to travel outside of the approved dates, you must request approval in advance from Ryan Malenczak and prove that traveling on alternate dates will result in an overall cost-savings. If traveling on alternate dates will not result in a cost-savings, then your request will be denied, and you will not be eligible for reimbursement for travel that falls outside of the specified dates.

### PERSONAL TRAVEL

Costs incurred for personal travel completed before, during, or after the campus visit will not be reimbursed under any circumstances.

## ALLOWABLE EXPENSES AND REIMBURSEMENT ELIGIBILITY

### Individual Expenses

You will only be reimbursed for purchases made by you and for your own individual expenses. You will not be reimbursed for purchases made for others. When possible, you should make a separate purchase that includes only your individual expenses. If it is not possible to make a separate purchase, you must highlight your portion of a shared purchase on an itemized receipt.

### Flight/Train/Bus Fare

Stevens can only reimburse for air, train, or bus fare in the lowest-priced class (i.e. Economy, Coach). Stevens will not reimburse for upgrades or travel insurance. Non-monetary payment methods (i.e. airline miles, credit card points) will not be reimbursed. Participants can be reimbursed for either air/train/bus fare or a rental car, but not both.

When booking your travel, you may want to keep in mind the nearby airports, train stations, and bus stations below:

### Airports:

- Newark Liberty International Airport (EWR) - 11 miles from campus (20-30 minutes by car)

- John F. Kennedy Airport (JFK) - 20 miles from campus (1+ hours by car)
- LaGuardia Airport (LGA) - 12 miles from campus (1+ hours by car)

**Amtrak Train Stations:** Newark Penn Station (NWK) and New York Penn Station (NYP)

**NJ Transit Bus and Train Stations:** Hoboken Terminal, Secaucus Junction, Port Authority Bus Terminal

### **Personal Vehicles**

Participants who choose to use a personal vehicle to travel the Doctoral Recruitment Weekend can be reimbursed for eligible miles traveled, tolls paid, and parking fees only. Gas cannot be reimbursed when using a personal vehicle. Only miles, tolls, and parking fees incurred for the purpose of this campus visit are eligible for reimbursement. Additional or unnecessary miles, tolls, and/or parking fees will not be reimbursed. Costs incurred for personal travel before, during, or after the campus visit will not be reimbursed. Eligible miles traveled will be reimbursed at a rate of [67 cents per mile](#). Proper documentation is required for reimbursement of miles traveled, tolls paid, and parking fees.

### **Rental Vehicles**

Participants who choose to use a rental vehicle to travel to the Doctoral Recruitment Weekend can be reimbursed for the cost of an Economy-class rental vehicle, tolls paid, parking fees, and the cost of regular gas only. Miles traveled in rental vehicles will not be reimbursed separately. Only tolls, parking fees, and gas incurred for the purpose of this campus visit are eligible for reimbursement. Additional or unnecessary tolls, parking fees, and/or gas will not be reimbursed. Costs incurred for personal travel before, during, or after the campus visit will not be reimbursed. Proper documentation is required for reimbursement of tolls, parking fees, and gas. Participants can be reimbursed for either a rental vehicle or air/train/bus fare, but not both.

### **Taxi/Rideshare**

Stevens can reimburse the cost of taxi/rideshare services (i.e. Uber, Lyft) to/from regional transportation hubs and the Sheraton Lincoln Harbor Hotel. The cost of tax/rideshare services to/from other destinations will not be reimbursed.

### **Parking**

Stevens can reimburse the cost of long-term parking at airports, train stations, and other transportation hubs. Stevens will not reimburse for parking near campus or the Sheraton Lincoln Harbor Hotel, because parking is available in both locations at no cost to registered attendees. If you will need to park at the hotel or on campus, please inform Ryan Malenczak of that as soon as possible and no later than February 25, 2024.

### **Meals**

Stevens can reimburse for the cost of meals incurred during the time participants are traveling to/from the Doctoral Recruitment Event during the approved travel period (March 20-24, 2024). Stevens cannot reimburse purchases of alcohol under any circumstances. Participants should only incur costs for meals that are not provided as part of the Doctoral Recruitment Event. The Doctoral Recruitment Event provides participants with dinner Thursday; breakfast and lunch on Friday; and breakfast on Saturday, so meals incurred during those periods cannot be reimbursed.

### **Other Expenses**

If you need to make a necessary purchase that doesn't fall under the guidelines below, please contact us with relevant documentation to request permission before making the purchase. If permission is not obtained, you will not be reimbursed for the purchase. Stevens cannot reimburse you for any purchases made with points.

## **DOCUMENTS REQUIRED FOR REIMBURSEMENT**

Reimbursements will be processed after you attend the Doctoral Recruitment Event. Participants must submit the following documents to be considered for reimbursement. Reimbursements will not be processed until a given participant has submitted all requested documentation. Reimbursements typically take 2-3 weeks to be processed after all requested documentation has been submitted.

**W-8 BEN Form (International Participants) or W-9 Form (Domestic Participants)**

U.S. Citizens, Green Card Holders, and Resident Aliens should submit a [W-9 Form](#). Note that the W-9 Form requires a Social Security Number. Non-Resident Aliens, including students who are in the U.S. on an F-1 and J-1 visa, should submit a [W-8 BEN Form](#). Note that the W-8 Form requires both your permanent address (in your home country) and your local mailing address (in the U.S.) for those who currently live in the United States. If you do not have a Social Security Number (SSN), you are required to enter your foreign tax identification number in section 6a. Instructions regarding the W-8BEN form can be [found here](#). Your reimbursement will be mailed via check using the address listed on your W-9 and the mailing address listed on your W-8BEN forms for those who reside within the United States.

### **Wire Transfer or Automated Clearing House (ACH) Form**

Attendees who live outside of the U.S. are required to have their reimbursement disbursed via wire transfer. Attendees who live within the U.S. have the option to receive their reimbursement as a direct deposit instead of a check in the mail. If you are interested in this option, please complete an Automated Clearing House (ACH) form.

### **Student Travel Information Form** (separate attachment)

The [Student Travel Information Form](#) is used to help the Finance Department determine if the travel reimbursement that we are providing is considered taxable income by the IRS. As you will see, we have pre-filled in some pieces of information for you. You will need to fill in your name, indicate your immigration status, and print and sign your name at the bottom.

### **Stevens [TABER Form](#)**

This form is used for reimbursements of approved travel expenses. Please enter exact amounts on this form. If you are travelling internationally, please use [this website](#) for U.S. currency conversion based on the date of purchase. When filling out the TABER Form, include the following information in each relevant section:

- **Payee's Full Name:** *Your full legal name*
- **School/Department:** *"Graduate Admissions"*
- **Account Number:** *Leave this line blank*
- **Telephone Number:** *Your cell phone number*
- **Departure Date:** *The date on which your travel began.*
- **Return Date:** *The date on which your travel ended.*
- **Business Purpose of Travel:** *"Doctoral Recruitment Event 2024"*
- **Transportation/Lodging/Communications:** *Provide details of the transportation and lodging expenses that you incurred.*
- **Mileage:** *Complete this section only if you used a personal vehicle and are seeking to be reimbursed for miles driven.*
- **Meals During Travel and Other Business Expenses:** *Provide details of the meals and other expenses that you incurred.*
- **Employee's Name and Employee's Signature:** *Print and sign your name*
- **Supervisor's Name and Signature:** *Leave this line blank*
- **Department Head Name and Signature:** *Leave this line blank*

### **Itemized Receipts with Proof of Purchase**

Participants are required to submit itemized receipts for all expenses. Itemized receipts list each of the items that were purchased, taxes & fees, tip (if applicable) and the total amount spent. Expenses without itemized receipts cannot be reimbursed. Your receipts are also required to show proof of purchase, stating if the expense was paid with cash or credit/debit card. For some purchases, this may mean multiple receipts for one transaction. When travelling internationally, please request English receipts whenever possible.

### **All reimbursement-related documents must be received **no later than April 18, 2024.****

It is strongly recommended that participants submit their Student Travel Information Form alongside the W-8 Form, W-9 Form, and ACH Form *in advance of the event*, to expedite reimbursement. Participants should submit the TABER Form and itemized receipts *after the event*.

### **U.S. Tax Treaties**

If you are from a country that the United States does not have a tax treaty with, you are eligible to have taxes taken out of your final reimbursement. The list of countries who has a tax treaty with the U.S. can be [found here](#).

**Printed Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_