

Post-Travel Reimbursement Team Checklist

Updated: Sept. 2024

Travelers must submit an application for reimbursement as a team. Each traveler must contribute the required individual materials and ensure the group application is complete. Include this completed checklist with all application materials in your team's Dropbox or Google Drive Folder.

	Name	Grad Yr
Team Leader, Traveler 1: (Select a point person for the application.)		
Traveler 2: (Only list those requesting reimbursement.)		
Traveler 3:		
Traveler 4:		

- _____ Each Traveler has checked that their banking information in SSOL is accurate and that their account includes an accurate US mailing address.
- _____ The Team has a single Google drive or Dropbox folder with all required files. Missing information from one person's paperwork will delay payments for the group.
- _____ The Team must complete this post-travel checklist and short project description.
 Client: _____ Destination: _____
 Dates On-Site: _____
 _____ Proof of Dates On-Site: Attach client communication confirming visit dates.
 _____ 3-4 Sentence Project Description: Who was the client, what were the project goals, and what work and methods did the team use? (Approx. 3 sentences or 75 words)
- _____ Each Traveler must provide a single aggregated PDF file showing airfare expenses in chronological order. (Use checklist on pg. 2)
- _____ The Team must complete a full Project Summary (1-page) with description of the organization, outline of project scope and objectives, and the outcome and experience for both the client as well as the student(s). Here is an [example project summary](#).
- _____ The Team should share project photos for school publications and donor reporting. Photos should be of the team, client, or project location and illustrate the project subject matter.
- _____ The Team must provide an electronic copy of the final report, presentation, or other deliverables provided to the client. Students should contact the Tamer Institute for Social Enterprise and Climate Change if deliverables contain sensitive or confidential information to discuss what information should be submitted.

Post-Travel Reimbursement Individual Checklist Updated: Sept. 2024

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	Name	Grad Yr
Team Leader, Traveler 1: (Select a point person for the application.)		

1. _____ Check that your banking information in SSOL is up to date and that your account includes an accurate US mailing address matching the one included below:

Full *Legal Name: _____ UNI: _____
**Nicknames may lead to delayed or inaccurate payments, even if used regularly at CBS*

US Mailing Address: _____

City / State / Zip Code: _____

4. _____ Provide a single aggregated PDF file showing airfare expenses in chronological order. Be sure to collect and include all items below:

_____ Payment receipts: documentation must include company name (i.e. Delta), date of purchase, the name of the paying party, flight charges, and payment method used (i.e. last 4 digits of CC). Airfare without receipts will not be reimbursed.

- ✓ To note: Only the person who actually paid for the airline ticket can be reimbursed. If a traveler pays for another team member's ticket, the traveler who paid will receive the reimbursements both tickets.
- ✓ Conversion: If flights were purchased in a foreign currency, provide a pdf showing the conversion from the currency used to USD on the date of purchase using the Oanda currency converter: www.oanda.com/currency-converter/en/.

_____ Airline travel itinerary: documentation must include traveler name, all destinations and dates; screenshot(s) or photo(s) of tickets from the trip.

- ✓ Destinations: All cities shown on the itinerary should be directly related to the project. Exceptions may be permitted case-by-case for stopovers or destinations not related to the project (e.g., your home city). Itineraries including non-related locations must be accompanied by a comparable flight documentation from and back to New York.

_____ Credit card statement: documentation must show the purchaser's name, the last 4 CC digits, and the relevant charges for the travel

Name your Single PDF of materials as "[Student Name] – [Client Name]" and add it to your team's application folder.

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	Name	Grad Yr
Traveler 2:		

1. _____ Check that your banking information in SSOL is up to date and that your account includes an accurate US mailing address matching the one included below:

Full *Legal Name: _____ UNI: _____
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