

Team Documentation: Post-Travel Checklist

Updated: Sept. 2025

After completion of travel, and in order to receive funds from the Tamer Institute, the following is required within 3 weeks post-travel or by June 1, whichever date comes first.

(No reimbursements for projects in the prior academic year will be processed after the June 1 deadline.)

01. _____ Each team member must check that their **banking information** in SSOL is accurate and that their account includes an accurate US mailing address.

02. _____ **Create a single Google drive or Dropbox folder** with all files described below for your team. Missing information from one person's paperwork will delay payments for the group.

03. _____ The Team must complete this **checklist** and provide a **short project description**:

Client: _____ Destination: _____

Dates On-Site with Client: _____

List All Team Member Names:

_____ Attach Proof of Dates On-Site, i.e. 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)

04. _____ **Each team member** must provide a single PDF file OR single drive sub-folder showing airfare expenses in chronological order. (Use checklists on pg. 2-5)

05. _____ **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](#). Also complete a Project Survey if this was requested for your team.

06. _____ **Any project photos** for School publications and donor reporting. Photos should be of the team, client, or project location and illustrate the subject matter of the project.

07. _____ **An electronic copy of the final report, presentation, or other deliverables** provided to the client. Students should contact the Tamer Institute if deliverables contain sensitive or confidential information to discuss what information should be submitted.

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Team Member 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: _____

Expenses

- **Expenses without receipts** will not be reimbursed.
- **Only the person who actually paid for the airline ticket can be reimbursed.** If you pay for yourself and another team member, only you can be reimbursed for both tickets. Please indicate charges clearly on your credit/debit card statement and itinerary.
- **Expenses in a foreign currency** not paid by credit card should be converted into USD using the currency rate on the date of purchase using the Oanda currency converter www.oanda.com/currency-converter/en/.
- **Travelers should book an economy flight.** If a traveler prefers to book business or first class, they must provide comparable flight documentation showing the equivalent itinerary cost on an economy ticket.

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 documentation of a comparable flight** from and back to New York without your stopover or alternative destination.

_____ Provide a single aggregated PDF file OR single sub-folder within the team's drive showing airfare expenses in chronological order. ALL of the following items are required:

_____ Payment receipts: documentation must include company name (i.e. Delta), purchase date, the name of the paying party, the name of the traveler, flight charges, and payment method used (i.e. last 4 digits of CC).

_____ Copy of the airline travel itinerary:

- Include the email booking confirmation with dates, times, and price paid
- Include a photo/screenshot of boarding passes

_____ Credit card statement: documentation must include the purchaser's name, the last 4 credit card digits, and relevant charges for the travel; **highlight relevant charges**

_____ Ensure that all team members have fully assembled documentation in order to receive your reimbursement. Missing information from one person's paperwork will delay payments for all.

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Team Member 2:

_____ 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: _____

Expenses

- **Expenses without receipts** will not be reimbursed.
- **Only the person who actually paid for the airline ticket can be reimbursed.** If you pay for yourself and another team member, only you can be reimbursed for both tickets. Please indicate charges clearly on your credit/debit card statement and itinerary.
- **Expenses in a foreign currency** not paid by credit card should be converted into USD using the currency rate on the date of purchase using the Oanda currency converter www.oanda.com/currency-converter/en/.
- **Travelers should book an economy flight.** If a traveler prefers to book business or first class, they must provide comparable flight documentation showing the equivalent itinerary cost on an economy ticket.

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 documentation of a comparable flight** from and back to New York without your stopover or alternative destination.

_____ Provide a single aggregated PDF file OR single sub-folder within the team's drive showing airfare expenses in chronological order. ALL of the following items are required:

_____ Payment receipts: documentation must include company name (i.e. Delta), purchase date, the name of the paying party, the name of the traveler, flight charges, and payment method used (i.e. last 4 digits of CC).

_____ Copy of the airline travel itinerary:

- Include the email booking confirmation with dates, times, and price paid
- Include a photo/screenshot of boarding passes

_____ Credit card statement: documentation must include the purchaser's name, the last 4 credit card digits, and relevant charges for the travel; **highlight relevant charges**

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Team Member 3:

_____ 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: _____

Expenses

- **Expenses without receipts** will not be reimbursed.
- **Only the person who actually paid for the airline ticket can be reimbursed.** If you pay for yourself and another team member, only you can be reimbursed for both tickets. Please indicate charges clearly on your credit/debit card statement and itinerary.
- **Expenses in a foreign currency** not paid by credit card should be converted into USD using the currency rate on the date of purchase using the Oanda currency converter www.oanda.com/currency-converter/en/.
- **Travelers should book an economy flight.** If a traveler prefers to book business or first class, they must provide comparable flight documentation showing the equivalent itinerary cost on an economy ticket.

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 documentation of a comparable flight** from and back to New York without your stopover or alternative destination.

_____ Provide a single aggregated PDF file OR single sub-folder within the team's drive showing airfare expenses in chronological order. ALL of the following items are required:

_____ Payment receipts: documentation must include company name (i.e. Delta), purchase date, the name of the paying party, the name of the traveler, flight charges, and payment method used (i.e. last 4 digits of CC).

_____ Copy of the airline travel itinerary:

- Include the email booking confirmation with dates, times, and price paid
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Team Member 4:

_____ 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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US Mailing Address: _____

City / State / Zip Code: _____

Expenses

- **Expenses without receipts** will not be reimbursed.
- **Only the person who actually paid for the airline ticket can be reimbursed.** If you pay for yourself and another team member, only you can be reimbursed for both tickets. Please indicate charges clearly on your credit/debit card statement and itinerary.
- **Expenses in a foreign currency** not paid by credit card should be converted into USD using the currency rate on the date of purchase using the Oanda currency converter www.oanda.com/currency-converter/en/.
- **Travelers should book an economy flight.** If a traveler prefers to book business or first class, they must provide comparable flight documentation showing the equivalent itinerary cost on an economy ticket.

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 documentation of a comparable flight** from and back to New York without your stopover or alternative destination.

_____ Provide a single aggregated PDF file OR single sub-folder within the team's drive showing airfare expenses in chronological order. ALL of the following items are required:

_____ Payment receipts: documentation must include company name (i.e. Delta), purchase date, the name of the paying party, the name of the traveler, flight charges, and payment method used (i.e. last 4 digits of CC).

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