

Physics and Astronomy Department - Business Justification Tips

Detailed purpose of meetings and conferences must be provided on all expense reports. It must include applicable information: description of how it relates to research or project or grant, event name, dates, participants names, your role (attendee, speaker, etc.).

Each traveler needs to ensure that the justification is clear and pertains to the current travel for each travel reimbursement request.

Everyone needs to use or answer the 5 W's: (Who, What, Where, When, and Why(How)) when completing the justification section for the reimbursement.

The guideline to use when considering the information that should be provided to support an expense when using the 5 W's are:

1. Who was involved in the expense?
2. What does the expense represent?
3. Where did the expense occur?
4. When did the expense occur (if other than the date on the receipt)?
5. Why or How does the expense relate to university business?

Very Important: While all these questions (the 5 W's) may not apply to every transaction/situation, information should be included whenever possible.

Some examples are as follows and change the wording for what pertains to the traveler's trip:

Travel to any location:

Jane Doe (Ph.D. student) traveled to San Francisco, CA (Example only), from 10/15-10/20/21 to attend the 2021 NACUBO conference to learn about Higher Ed practices and network with professionals from peer institutions.

Membership Dues:

American Academy of Arts & Sciences Membership Dues for Professor Jane Doe for the 2023 fiscal year (July 1, 2022 - June 30, 2023). Membership of Rutgers faculty in the AAAS brings prestige to the university and helps raise its status

Conference Program:

The conference Program needs to be attached when someone attends a conference.

Meeting to give a talk:

Should attach correspondence inviting you to attend the meeting

Travel to Meet with a colleague to review research, etc.

Should attach correspondences referencing plans to attend the meeting

Meeting to discuss research:

Travel expenses associated with a trip to ABC university Dallas, Texas, (Example location only) from Sept 15-20, 2021, to meet with professors to discuss results of research (explain research)

Meals:

Dinner at Restaurant ABC for graduate students Jane and John Doe while traveling to Boston to attend the XYZ Conference on 6/16/21-6/19/21

Lunch/Dinner with seminar speaker on 6/20/21 to facilitate further discussions on seminar topic or research related to the seminar topic. Attendees are: list the people attending the dinner

Shuttle Transportation:

Fare for the shuttle between Hilton hotel and convention center (list location) for Professor Doe and Professor Jones, 05/31/21, during Physics conference where the Professors were presenting research results on (explain the research)