



TRAVEL AND EXPENSE MANAGEMENT

UCM Reimbursement Guidance – Using the 5W Method

This document provides guidance for writing clear, complete reimbursement justifications using the Who, What, When, Where, Why (5W) framework. This approach supports audit readiness, ensures policy compliance, and helps processors and approvers quickly understand the business purpose of submitted expenses.

Who:

Jane Doe, Assistant Professor, Department of History

What:

Expenses examples include the following:

- **Airfare:** Roundtrip ticket from Sacramento, CA to Washington, D.C.
- **Hotel:** 4 nights at the Georgetown Inn, located near the research archive
- **Meals and Incidentals:** Per diem claimed for 5 days
- **Ground Transportation:**
 - Rideshare from: Home to Sacramento Airport (April 2, 2025)
 - Rideshare to Library of Congress from hotel (April 3–6, 2025)
 - Rideshare to D.C. Airport for return flight (April 6, 2025)
 - Purpose: Research-related site travel and airport transfers

Total reimbursement requested: \$1,983.62

All receipts and itemized documentation are attached.

When:

- Expense dates: April 2–6, 2025
- Reimbursement submitted: April 10, 2025

Where:

- Travel from: Merced, CA
- Travel to: Washington, D.C.
- Research conducted at: Library of Congress Manuscript Division
- Lodging at: Georgetown Inn, 1310 Wisconsin Ave NW, Washington, D.C.

Why:

Travel was pre-approved by the department chair as part of a funded faculty research project titled *"Documenting Federal Housing Policy in Post-War America."* The Library of Congress houses exclusive primary source materials essential to this project, including congressional transcripts and original HUD documents. This archival work supports the preparation of a peer-reviewed journal article and aligns with my faculty research plan submitted in Fall 2024. The trip is also referenced in my approved research grant budget under "archival travel." This expense directly contributes to scholarly output, supports grant objectives, and fulfills university research mission goals.