



The University of Connecticut Travel and Entertainment Policies and Procedures



University of Connecticut

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PURPOSE

The University of Connecticut (University), here defined as all campuses and programs except the Health Center, recognizes and supports the need for faculty, staff, and students (undergraduate and graduate) to travel for conferences, events, and other purposes that further the reputation of the University and enhance the productivity of the University community. Likewise, the University may also find it important to entertain guests.

University business includes travel and entertainment related to activities such as program accreditation, student assessment, academic programming, clinical placements, presentations at or participation in conferences, professional development, fundraising, continuing education, travel related to an employee's official duties, and many other important activities that support the intellectual and operational endeavors of the University.

At the same time, as a State agency, we must respect and safeguard our travel privileges and funds. We must practice fiscal, ethical, and public responsibility. This policy sets forth rules and procedures that balance the University's legitimate travel and entertainment needs with sound stewardship of public resources.

This policy addresses the most common aspects of University business travel and entertainment. It cannot contemplate every situation that might arise, however. Travelers and administrators with questions should contact their supervisor or the Office of Travel Services for guidance before they arrange their travel.

This policy applies to all University employees, students, and guests, including but not limited to recruits and job candidates. The policy shall also apply to the travel and entertainment expenses of contractors, unless the applicable contract provides terms inconsistent with this policy. Where the policy is intended to apply differently to any of the above University business travelers it will be so stated in the appropriate section of the policy. This policy covers all types of University travel for individuals, groups, and team travel.

GENERAL GUIDELINES

Employees can be reimbursed for travel and entertainment expenses related to legitimate University business. To be reimbursed, expenses must be reasonable and appropriate to the circumstances.

Students should follow the same policies for University employees, with the exception of those provisions in Collective Bargaining Agreements that apply to particular employees. Students are reimbursed at the same rate as unclassified employees.

ELIGIBLE FOR REIMBURSEMENT

With appropriate justification and documentation, travelers can be reimbursed for coach airfare, standard railroad tickets, conference registrations, mileage, tolls, lodging, meals, car rental, parking (elsewhere than Bradley International Airport), and other relevant business expenses. For domestic out-of-state travel, travelers may receive reimbursement for expenses for one travel day preceding a conference and for one travel day following a conference.

This policy explains in more detail what may be reimbursed and how, and also sets forth exceptions and restrictions that may apply. Travelers and administrators should contact the Office of Travel Services if they have any questions about what may be reimbursed.

A primary goal of these policies is to generate cost savings for the University to the greatest extent possible, while simultaneously maintaining the convenience and practicality of the traveler. If a traveler can document a cost saving measure, which would otherwise be in violation of these policies, the Office of Travel Services will review the expenditure and, most often, support and reimburse the cost saving measure.

In situations where individuals may share expenses related to travel or entertainment, it is the policy of the University to reimburse the individual who can document having paid the shared expense. The University is not a party to agreements between individuals to loan or share expenses, and individuals who enter such agreements are responsible for settlement between themselves.

In special circumstances, exceptions to these policies may be warranted. The President or Provost, or their authorized designees, may review and grant exceptions, as may the Executive Vice President for Administration and Chief Financial Officer, or the Athletic Director. All exceptions must be documented on a completed and signed Exception to Policy form. Additionally, individuals who require accommodations for reasons of health or disability may seek reasonable exceptions to this policy. Individuals who seek such accommodations may seek the assistance of the University's Office of Diversity and Equity.

The University reimburses travel and entertainment expenses pursuant to the rules applicable to accountable plans under Section 1.62-2(c)(1) of the Treasury Regulations and, for certain independent contractors, the rules applicable to working condition fringe benefits under Section 132(a)(3) of the Internal Revenue Code and the Treasury Regulations corresponding thereto. Accordingly, all reimbursable expenditures must have a business purpose and must be supported by documentation. Whenever this policy is silent or ambiguous about the sufficiency of documentation of expenses, the terms of the tax authorities cited above shall control. For further guidance, travelers may consult IRS Publication 463.

NOT ELIGIBLE FOR REIMBURSEMENT

Employees are responsible for getting to and from work each workday. Employees will not be reimbursed for mileage associated with their normal commutes, regardless of the location of their home in relation to their official

duty station at the University. Moreover, when an employee travels from their home to an off-site business destination (including an airport or a rail station), only the difference between the mileage to the off-site destination and the mileage of the employee's normal commute is eligible for reimbursement. In other words, employees must deduct the mileage of their normal commute when they claim mileage for travel from their homes to business destinations.

Travelers will not be reimbursed for personal items, including but not limited to newspapers, magazines, toiletries, laundry services, childcare costs, pet boarding fees, credit card interest or late fees, hotel and airline membership fees, airline upgrades, pillows, blankets, headsets, or parking for personal travel.

Travelers will not be reimbursed for parking fines, traffic violation tickets, towing charges, or other vehicular fines.

Travelers will not be reimbursed for trip cancellation or other private insurance. For this reason, as well as administrative considerations, travelers are strongly encouraged to book their flights through the University's contracted and preferred agency (currently, Sanditz). For international travel only, medical insurance is provided by the University.

Travelers are required to use rebates and vouchers earned during University business travel for future University business travel. Expenses paid with rebates and vouchers are not eligible for reimbursement regardless of how the vouchers were earned.

In addition, travelers will not receive travel reimbursement for participation in events that are not related to their University work or activities.

REIMBURSEMENT APPROVAL

To avoid actual or apparent conflicts of interest, and to ensure proper separation of duties, employees may not approve payment or reimbursement for their own expenses, expenses of a close relative, expenses related to an event in which they participated, or expenses of an individual to whom they directly or indirectly report. Employees' travel and reimbursement requests are subject to approval by supervisors, the Fiscal Officer of the account(s) from which the expenses are paid, and the University Office of Travel Services. All three of these constituencies share responsibility in enforcing this policy and confirming that all reimbursements are supported with a business purpose and clear documentation. Additionally, travel expenses funded by sponsored awards administered by the University may be subject to review by Sponsored Program Services. By way of illustration, Deans approve expense reports and reimbursements for Department Heads and other direct reports. The Provost and President approve expense reports and reimbursements for Deans, Vice Provosts, Vice Presidents, and other direct reports. The Board of Trustees or their designee approves the President's expense reports and reimbursements.

To be reimbursed, all travelers must submit receipts. Specific requirements for airfare, rental car, meal, lodging, and entertainment reimbursement are provided in the applicable Policies and Procedures section. The reimbursement approval for non-employees, students, and student athletes follows the same reporting line approval of the funding source.

Procedure

To be reimbursed, Travelers are requested to submit a Travel WebForm, along with all supporting documentation to the Office of Travel Services within fifteen days of returning from a trip. The University is committed to the timely processing of financial transactions as an integral part of operations, and is also observant of the tax rules applicable to employee reimbursements. Therefore, reimbursements submitted later than 60 days after travel is complete will be paid only at the discretion of the appropriate Department Head, Director, or Dean.

Upon returning from travel, travelers or their designated departmental administrators seeking reimbursement of travel expenses must:

1. *Complete the Travel WebForm available at <http://travel.uconn.edu>.* When the Travel WebForm has been completed, the traveler's supervisor will be notified and will be asked to approve the reimbursement. When the supervisor has approved the reimbursement, the traveler and KFS initiator will be notified and directed to the completed form.
2. *Produce documentation of the expenses, including bills, receipts and/or credit card statements.* Consistent with the practice of other Connecticut state agencies, such documentation is not necessary for expenditures of \$25.00 or less.
3. *Have a Disbursement Voucher ("DV") prepared in the KFS System, attaching the completed Travel WebForm and expense documentation.* Note that travelers must have another member of their office or department, such as a departmental administrator, prepare the DV for them.

To limit processing multiple claims for mileage reimbursements for very small amounts, travelers should combine mileage from multiple trips in one claim so that the total reimbursement due is at least \$25.00.

PART 1: PLANNING BUSINESS TRAVEL

1a. AUTHORIZATION TO TRAVEL

While the University Office of Travel Services does not require written preapproval for travel, University travelers are strongly encouraged to obtain written departmental approval before incurring any travel-related expenses. Individuals who incur travel expenses without the approval of their departments bear the risk that their expenses will not be reimbursed upon return. Similarly, individuals who book travel through Sanditz without prior approval may be personally responsible for repayment of such charges. The decision to reimburse a traveler in connection with travel that had not been preapproved, or to seek repayment from a traveler who incurs unauthorized expenses, will be discretion of the traveler's supervisor, Department Head, Director or Dean.

For any trip that requires (i) use of the State Employee Bradley Airport parking pass; (ii) travel advances; and (iii) all employee international travel, travelers must complete the Travel WebForm in advance of their trip. Even where travelers are not required to complete the Travel WebForm in advance, travelers are still encouraged to do so to assist their respective departments with planning, tracking and budgeting.

Procedure

The Travel WebForm is available at <http://travel.uconn.edu>.

1b. TRAVEL ADVANCES

Travel advances are available for out-of-state and international trips that cost more than \$300. To obtain an advance, employees must sign a travel advance agreement that permits the University to recover, through a payroll deduction, any amount of an advance that exceeds the final reimbursement to which the employee is entitled. However, this deduction from payroll is only used when the payment is not received from the employee in a timely manner. Students may also obtain travel advances, but student advances are the responsibility of the sponsoring department. In all cases, in the event that University Office of Travel Services is ultimately unable to recover a travel advance, the unrecovered balance will be charged to the traveler's department.

Travel advances are limited to 75% of estimated costs, excluding those costs that are eligible to be paid directly by the University (such as air tickets, conference registration fees, hotel, or rental car). Advances will not be issued more than 10 days prior to the departure date.

Failure to submit a reimbursement claim or to repay the balance of an advance that exceeds the allowable reimbursement for a trip in a timely manner may jeopardize an employee's ability to obtain future advances. Advances will not be issued when an employee has an outstanding advance balance for more than 15 business days or an existing cash advance for which a reimbursement request has been due for more than 15 business days. Once the outstanding balance has been paid or a reimbursement request has been filed with the Office of Travel Services, the advance request may be processed.

Procedure

To request an advance, a traveler must complete the travel advance agreement on the Travel WebForm, and the KFS initiator must submit a DV for the travel advance with the Travel WebForm attached.

Once the traveler has completed the Travel Advance Agreement portion of the Travel WebForm, the departmental employee responsible for financial transaction submissions must submit the Travel Advance request.

1c. OFFICIAL TRAVEL PARTIES

Formal groups, such as intercollegiate athletic teams, student organizations, and academic groups or classes on field experiences, may be designated as “Official Travel Parties” by a Department Head, Director or Dean.

For the purposes of this subsection, a “non-official travel party person” is any UConn employee not included on the Official Travel Party roster, who has approval to accompany the Official Travel Party on their field experience or athletic competition.

“Non-university affiliated individuals” are persons who are not on the Official Travel Party roster and do not have an employment or contractual agreement with the University. Such persons may travel on official business if they receive prior written approval from the President or Provost (or their authorized designees) or the Athletic Director. All costs associated with the non- university affiliated individual are the sole responsibility of the non-university affiliated individual.

Non-Athletics Division personnel identified as a part of an athletic team’s Official Travel Party (such as team physicians and CPIA, NCAA FAR, and University Public Safety personnel) must have a legitimate business purpose for being included and require approval by the President or his or her authorized designee.

When a student or student athlete who is on Official Travel Party roster requires travel arrangements separate from the Official Travel Party, the appropriate Department Head, Director, Dean or designee must approve the travel request and the additional costs incurred prior to the student’s or student athlete’s departure.

Procedure

Groups must submit an “Official Travel Party” roster to the relevant Department Head, Director, or Dean who will determine the Official Travel Party for each group by semester or season, as appropriate. Departments and Divisions must submit their Official Travel Party roster(s) (including PeopleSoft ID Numbers) to the Office of Travel Services at least one week prior to the first travel event of the semester or season.

Non-official travel party personnel must submit a separate Travel WebForm. These expenses should not be included with the Official Travel Party’s expenses.

Non-university affiliated individuals must receive prior written approval from the President or Provost (or their authorized designees) or the Athletic Director. The justification submitted for approval must include the reason for the individual(s) to travel, the cost incurred by the University for the individual(s) to travel, how that cost was calculated, and how the non-university affiliated individuals will reimburse the University. The repayment from a non-university affiliated individual for charter airfare expenses, incurred on their behalf by the University, will be calculated and based on the Standard Industry Fare Level (SIFL) method, as published by the IRS.

In the event that a student or student athlete requires travel arrangements that are separate from their Official Travel Party, the appropriate Department Head, Director, Dean or designee must approve the request in writing. A written request for approval should include the reason for the separate travel arrangements and comparisons of various modes of alternate transportation. The Department Head, Director, Dean or designee should approve lowest reasonable cost that meets the time constraints of the event or athletic competition. Departments or Divisions must then submit written documentation of cost comparisons and the rationale used to select the method of travel to the Office of Travel Services. The Office of Travel Services and Department or Division should maintain all documentation for subsequent review and audit.

1d. SPOUSAL/PARTNER TRAVEL AND ENTERTAINMENT PARTICIPATION

The travel or entertainment expenses of a spouse, partner, or dependent generally fall within one of three classifications. (Such expenses are not allowed on sponsored awards.)

Bona Fide Business Purpose

If the attendance of a spouse or partner serves a bona fide business purpose for the University, the University may pay the travel or entertainment expenses of the spouse or partner. To meet the high standard of a bona fide business purpose, the presence of the spouse or partner must be compelling or essential (and not just beneficial) to carry out the business interests and functions of the University.

Employment Agreement

Absent a bona fide business purpose, if an individual's University employment arrangement or contract permits his or her spouse to travel, or provides that his or her spouse may attend University events, then the cost of such travel or event, or any reimbursement therefore, will be considered compensation to the employee and will be included in the taxable wages of the employee.

Accompaniment with No Business Purpose

The travel and entertainment expenses of a spouse, partner, or dependent who has no official role for the University and is simply accompanying an individual on University-related travel are the personal responsibility of the traveler. Such individuals may, however, accompany the traveler with the permission of the appropriate Department Head, Director or Dean. If the University incurs any costs associated with such individuals, the traveler shall reimburse the University in a timely manner.

Procedure

The Office of the President will identify certain spouses or partners who are deemed to be representatives of the University with respect to essential University business such as fundraising or development. These individuals will be treated as having a bona fide business purpose for travel related to such essential University business.

The payment or reimbursement of the travel expenses for other spouses or partners having a bona fide business purpose requires the written approval of the President, Provost or their authorized designees.

1e. COMBINED BUSINESS AND PERSONAL TRAVEL

Employees may combine travel for personal and business reasons, but must be mindful of all applicable state and University ethics policies.

Travelers will not receive reimbursement for personal travel expenses. Travelers will only receive reimbursement for travel to and from the business destination.

In special cases, travelers will be able to combine their business and personal travel at a cost lower than if a single trip were only for business. In these special cases, the University will reimburse the traveler for the lower-cost business and personal trip; provided that the traveler has clearly documented the cost savings to the University.

Procedure

Travelers who wish to combine personal pursuits with University business on a single trip must indicate the dates and location of the personal time on the Travel WebForm.

In the unusual case that a combined business and personal trip is at a lower cost than a business-only trip, the traveler must provide supporting documentation and economic justification from the time of booking, including cost comparisons from Sanditz on the date of booking, attached to the Disbursement Voucher.

PART 2: AIR TRAVEL

2a. TRANSPORTATION TO AND FROM AN AIRPORT

Travelers should use the most reasonable and cost effective mode of travel to airports. Except in cases where a traveler provides a written explanation of special circumstances, travelers must use a personal vehicle to travel to and from the airport of departure. For travel to and from the destination airport, the appropriate means of travel to the airport may include a personal vehicle, a rented vehicle, a taxi, or a shuttle service. Private livery services (defined herein to mean all private vehicles for hire, except for taxi services) are not to be used by employees, students, consultants, or gratis appointments unless the traveler provides a written explanation of a special need for a private vehicle. Acceptable special needs for a private vehicle shall be evaluated by the Travel Services office and may include, but not be limited to cost saving, accommodation for a health or medical concern, the unavailability of other options, or the need to transport an important University guest. Exceptions or additional review may be granted or conducted by the appropriate Department Head, Dean, or Director.

Travelers may be reimbursed for personal vehicle mileage in accordance with this policy. However, travelers will receive reimbursement for the difference in mileage between their trip to the airport from their home or official duty station (where the employee is permanently assigned) and their normal commute to work. In other words, if a traveler lives closer to Bradley International Airport than to his or her official duty station, and if the traveler travels directly from his or her home to the airport, the University will not reimburse the traveler for the trip to the airport.

Travelers will not be reimbursed for airport hotel costs prior to the day of departure or after arrival.

Procedure

Travelers should request reimbursement for mileage on the Travel WebForm. To calculate reimbursable mileage to and from the airport, travelers should calculate the total round-trip mileage between their home and the airport, and deduct the round-trip mileage of their normal commutes.

2b. PARKING AT BRADLEY INTERNATIONAL AIRPORT

Fourteen-day parking permits are available to employees on University business for Bradley International Airport. The permits allow state employees to park in designated lots. If a traveler does not request a parking permit or fails to secure the permit from the Office of Travel Services before departure, the traveler will be responsible for his or her own parking expenses and the parking expenses will not be reimbursed.

If the business travel extends beyond the permit's fourteen-day limit, the employee is responsible for the additional fees, but may be reimbursed for the additional parking expense.

If the state-designated lot is at capacity, employees should park at the lowest-cost economy parking lot. Employees will be reimbursed for parking expenses incurred when the state-designated lot is at capacity.

Students who are on payroll are eligible to receive parking permits for Bradley International Airport provided that the business travel is related to their employment. Students who are not on payroll should park at the lowest-cost economy parking lot available, and may be reimbursed for these expenses at the discretion of their departments.

Individuals who park in Short-Term Parking across from the airport terminals in order to pick up arriving University travelers may have these expenses reimbursed.

Procedure

Prior to Travel:

To obtain a parking permit, the traveler must use the Travel WebForm. After the Travel WebForm is submitted, a parking permit will be mailed if the departure is greater than 5 business days away. Travelers that are departing sooner than 5 business days may pick up their parking permits at the front desk of the Office of Travel Services; provided the pre-trip portion of the Travel WebForm has been completed. It is the traveler's responsibility to obtain the parking pass before departure.

Travelers should review and follow the instructions and information printed on the permit prior to parking.

At the Airport:

The employee must present the parking permit to the attendant when they exit the state employee designated parking lot. If the state-designated lot is at capacity, travelers should park at the lowest-cost economy parking lot.

After travel:

To receive reimbursement if the state-designated lot was at capacity or if the traveler incurs any charge for parking for a period greater than fourteen days, the traveler must submit the paid receipt and the original parking permit with a brief explanation in the "Remarks" section of the Travel WebForm.

Those picking up arriving University travelers (including, on rare instances, graduate students) may submit paid parking receipts for reimbursement.

2c. COMMERCIAL AIR TRAVEL

Employees should generally purchase the lowest commercial airfare available, but may also make reasonable allowances for practicality and preferences such as safety, scheduling and any need for special accommodations. Travelers are strongly urged, but not required, to use the University's contracted and preferred agency (currently, Sanditz) to book airline travel.

Likewise, travelers may not insist on non-stop flights. In determining the lowest and most practical commercial fare, the traveler should consider not only non-stop flights, but also flights with one connection (both departing and/or returning). A domestic traveler's flight should depart from the airport nearest to the employee's official duty station or home, but a traveler may use a different airport if travel from that airport is documented to be less expensive, taking into consideration additional expenses such as parking, mileage, and/or overnight stays. International travelers should depart from major airport or airline hub located in reasonably close proximity to the employee's official duty station (for example, JFK, LaGuardia, Newark or Logan). Travelers should purchase non-refundable tickets unless a refundable ticket is documented to be less expensive.

First class air travel rates will not be paid for or reimbursed. The University will allow business class travel, however, on international flights with at least one flight segment exceeding eight (8) hours in duration. All business class ticketing must be booked through Sanditz.

Note that the “Fly America Act,” 49 U.S.C. 40118, requires all University travelers to use United States air carriers for all air travel and cargo transportation services supported by Federal funds. One exception to this requirement is transportation provided under a bilateral or multilateral “Open Skies” air transport agreement, to which the United States government and the government of a foreign country are parties, and which the Department of Transportation has determined meets the requirements of the Fly America Act. More information is available at <http://www.gsa.gov/portal/content/103191>.

Procedure

Travelers may make commercial air travel arrangements in one of two ways:

x Contracted (Preferred Method)

Travelers may make travel reservations and ticket purchases with Sanditz, available through the link available at <http://travel.uconn.edu> or by calling 1-877-826-6733). At the time of purchasing, the traveler will need to provide Sanditz with his or her employee number, and the KFS account number(s) to fund the airfare. When using the preferred agency for booking, the itinerary and/or boarding pass are not required when submitting the Travel WebForm for other travel expense reimbursement.

x Non-Contracted

Travelers may make travel arrangements through an agency or airline of his/her choice and pay the agency or airline directly. However, travelers will not be reimbursed for web or travel agency fees in excess of the contracted rate charged by Sanditz. Additionally, reimbursement requests for airline tickets that are not booked through the preferred agency must be accompanied by documentation or confirmation that the trip actually took place. Acceptable documentation will vary from case to case, but may include, for example, a hotel receipt, restaurant receipt, or receipts for other business expenses, demonstrating that the Traveler reached his or her destination.

Airfare that is booked outside of Sanditz is not eligible for business class travel. If a traveler chooses business class travel for a flight booked through channels other than Sanditz, the traveler will be reimbursed at the lowest reasonable coach class airfare.

Travelers using a federal grant to fund their travel must be in compliance with the Fly America Act and Open Skies Agreement. The Office of Vice President for Research, Sponsored Program Services may be contacted for more information regarding compliance with the Fly America Act and Open Skies Agreement.

To be reimbursed for special arrangements that involve extra expenses, travelers must document that the total cost to the University is lower by providing economic justification with the Disbursement Voucher and attaching supporting documentation of their calculations (e.g. copies of airfare quotations from the travel agency when the travel was booked).

By requesting payment or reimbursement for airfare expenses, each traveler certifies that he or she has made best efforts to choose the lowest commercial fare available, giving due consideration for nonmonetary factors such practicality, safety, scheduling and any need for special accommodations. Payment or reimbursement amounts may be subject to additional review by departments and administrative offices, including the Office of Travel Services.

2d. BAGGAGE FEES

If there is a charge for checked baggage, the cost for the first two bags checked will be reimbursed. Additional baggage fees will only be reimbursed if the traveler provides an appropriate written business justification for the excess baggage.

Travelers will be reimbursed for baggage handling gratuities at a rate of \$5 for day of departure and \$5 for day of return. The total of gratuities for baggage handling, maid service, bell hops and other similar gratuities will only be reimbursed in the aggregate at \$5 for day of departure and \$5 for day of return. If the per diem method for meals is selected for reimbursement, these gratuities cannot be claimed, as they are already included in the incidental expense reimbursement portion of the per diem.

Procedure

Travelers should attach receipts or documentation for baggage fees, specifically detailing the traveler's name and proof of payment, to the Disbursement Voucher.

2e. UNUSED TICKETS

The University will not reimburse a traveler for an unused ticket purchased by the traveler.

Procedure

If the traveler purchased a ticket using Sanditz, who billed the University, then the traveler's department should contact the agency to determine if the ticket is reusable. If the ticket is reusable, the department will need to track the ticket and use it for future business travel. If the ticket is refundable, the agency will apply the credit to the University's procurement-card number on file. Tickets purchased by the University remain University property, and may not be used for personal purposes.

Unused tickets may not be charged to sponsored awards unless the tickets are reused, and such reuse inures to the benefit of the same sponsored award.

2f. CHARTER AIR TRAVEL FOR OFFICIAL TRAVEL PARTIES

Under limited circumstances, University staff and students may use a charter airplane when it supports legitimate University business, if approved by the President or his or her authorized designee.

Procedure

Departments and Divisions that want to charter air travel must perform a comparative analysis with commercial air travel and obtain the President's or his or her designee's approval prior to requesting a chartered flight. The request for charter air travel must include a justification statement, the Official Travel Party roster, the number of additional people traveling, and their affiliation with the University.

If approved, the University Purchasing Department will conduct a competitive bid process. The selection of a charter airplane must reasonably align with the size of the official travel party, taking into account the travel distance, necessary cargo space or capacity, and the available aircraft for the date and location. In the event that the seating capacity of the airplane significantly exceeds the size of the travel party, the Department or Division must provide a clear explanation.

The requesting Department or Division must provide all documentation of the rationale for using this mode of travel, the approval obtained, and the procedure followed to secure the charter to the Office of Travel Services.

PART 3: GROUND TRAVEL

3a. GROUND VERSUS AIR TRAVEL

A traveler may use ground transportation (vehicle or rail) for personal reasons, even if air travel is a more time-effective mode of transportation. Under these circumstances, the cost for the ground transportation, meals and lodging, parking, mileage, tolls, taxis, and ferries may be reimbursed as long as these costs do not exceed the cost of airfare, based on the lowest reasonable commercial fare available from a standard commercial air carrier, plus transportation costs to and from the airport.

Procedure

To obtain reimbursement for ground transportation when air travel is more time-effective (taking into consideration additional time requirements of air travel such transportation to and from airports, parking, and connections), travelers must document the cost comparisons of ground travel versus air travel using itineraries from Sanditz, and include the documentation with the DV requesting reimbursement.

3b. RAIL TRAVEL

The University will pay for or reimburse rail travel in accordance with this policy, even if air travel is a more time-effective mode of transportation. Business class accommodations are available for rail journeys longer than four hours. Travelers will not receive reimbursement for first class travel rates.

Procedure

Rail tickets may be booked through Sanditz, and the University will pay the agency directly. Alternatively, Travelers may book rail travel independently, but prior to reimbursement, such travelers will be required to document the cost of such travel compared to the rail tickets offered by Sanditz, and the University will only reimburse the lesser of the two. Travelers who book rail travel independently should attach all original and applicable receipts, tickets and itineraries to the Disbursement Voucher.

Ticket delivery fees will not be reimbursed if online tickets or pick-up is available.

3c. STATE-OWNED VEHICLES

If the University issues an employee or department a state-owned vehicle, the employee or department should use the state-owned vehicle for in-state business travel whenever possible. Charges for tolls and parking are reimbursable when using a State-owned vehicle. Further Information is available from the UConn Motor Pool: <http://logistics.uconn.edu/motor-pool/>. Also, the Connecticut Department of Administrative Services provides a "Policy for Motor Vehicles Used for State Business": <http://das.ct.gov/Fleet/GL115rev2012.pdf>.

3d. PERSONALLY OWNED VEHICLES

When a department authorizes an employee to use his or her personal vehicle for University business, the University will reimburse the employee at an established mileage rate, which is periodically updated and located on the Travel Services website. Travelers will be reimbursed for trip related tolls and parking.

Travelers will not receive reimbursement for travel from their homes to their official duty stations, such as commuting expenses, unless provided under the applicable collective bargaining agreement. In those limited cases where commuting expenses are reimbursed, the tax laws require that the reimbursement be treated as taxable income to the employee, and the University will withhold the appropriate taxes.

For the purposes of this policy, the term “official duty station” has the same meaning as his or her “tax home,” as that term is used in IRS authorities related to travel expenses. Generally, an individual’s official duty station is his or her regular office or post of duty. If an individual has more than one office or post of duty at the University, then the official duty station of that individual is generally the location at which the individual spends the most time.

When an employee’s official duty station is not a physical location at the University, or if the employee’s official duty station has changed from its original location, the employee may be eligible for travel reimbursements based on his or her official duty station if he or she first provides documentation, such as an employment letter or signed memorandum from his or her Department. The documentation must be received by the Office of Travel Services before the reimbursement may be processed.

Travelers will not receive travel reimbursement for participation in events that are not related to their University work or activities.

Consistent with requirements of Connecticut State Agencies, it is the responsibility of the traveler to maintain automobile insurance in the minimum amounts of \$50,000/\$100,000 (third party liability) and \$5,000 (property damage liability), if using his or her personal vehicle for business purposes.

Unless permitted by collective bargaining agreements or exception to policy, travelers will not receive reimbursement for travel on the Storrs Campus or for travel between the Storrs and Depot Campuses.

Procedure

If an employee uses his or her personal vehicle for business travel, the employee should calculate the mileage sought to be reimbursed by deducting their normal commuting mileage from the total mileage of their trip. The trip mileage should start from home and end at home.

3e. RENTAL VEHICLES

Travelers may rent vehicles from the preferred vendors (currently, Enterprise and National) for domestic travel when needed for the business trip, at the discretion of each traveler’s reporting line and/or funding source.

The size and class of the rented vehicle should be reasonable and appropriate for the number of intended passengers. Travelers should only rent vehicles in the following classes: economy, compact, intermediate, standard, full size, mini-van, cargo van, and pick-up truck. Travelers may not rent vehicles in the following classes without justification and approval from the appropriate Department Head, Director, or Dean: premium, luxury, small sport utility, or large sport utility.

University-contracted rental rates already include the following insurances: collision, third party liability, and property damage liability insurances. The University will not pay for or reimburse the traveler for additional insurance. However, additional charges for GPS and roadside assistance may be reimbursed at the discretion of the department and/or funding source. Travelers are encouraged to obtain the authorization of their respective departments and/or funding sources prior to incurring such additional charges.

Travelers are responsible for returning the vehicle with a full tank of fuel to avoid surcharges. Travelers may not be reimbursed for the fuel service option, whereby a renter agrees to pay for a full tank of gas at a set price instead of returning the vehicle with a full tank of gas

The University will not pay for penalties, fines, fees, or extra cost options not discussed above.

When a rental vehicle is needed for international travel, the University's preferred agencies (currently, Enterprise and National) should be utilized to obtain the best rates. For international travel, it is recommended that travelers maintain the minimum coverages for insurance through the rental company.

All efforts to secure the preferred vendor pricing for University guests are to be made by the host department. When a guest uses a non-preferred vendor at a higher cost, a justification must be documented. In these cases, the Office of Travel Services may require approval from the appropriate Department Head, Director, or Dean.

Procedure

Reservations using the University's preferred rental car vendors (currently Enterprise and National) can be secured by using Sanditz and paid for directly with a University account. To reserve a rental car through Sanditz, travelers must supply the KFS account(s) that will fund the expense.

Travelers who do not reserve their vehicle rentals through Sanditz are still eligible for reimbursement of their vehicle rental expenses; provided that the expenses do not exceed the preferred vendor's comparable cost. Travelers who rent a vehicle for University business should still use the University-contracted agencies (currently, Enterprise and National), unless a competitor is less expensive. If the traveler chooses a competitor, the traveler must justify the selection with documentation of the cost savings, including a comparison of comparable rentals from the University-contracted agencies (including insurance costs), when submitting the Travel WebForm. When a non-preferred vendor is selected on the basis of cost savings, the traveler should maintain the required minimum insurance coverage (\$50,000/\$100,000 third party liability and \$5,000 property damage liability, or the closest coverage available). Travelers are personally responsible for any costs associated with not carrying the minimum required insurance coverage.

Note that, in all cases, travelers will be required to present a credit card and driver's license when picking up their vehicles. Direct payment for rental costs from a University account is limited to car class rates and mandatory taxes and fees.

All rental car reimbursement requests must be submitted with an itemized paid receipt. Credit card receipts, by themselves, are not sufficient for reimbursement.

PART 4: LODGING

4a. OUT-OF-STATE LODGING

When overnight accommodations are required to conduct official University business, reimbursement for lodging will be the actual cost of lodging at the lowest reasonable cost available, as determined by the trip's circumstances. Any lodging expense that exceeds the federal per diem lodging rate by more than fifty percent (excluding taxes) requires the approval of the Department Head, Director, or Dean. Lodging provided through a conference may exceed the federal per diem rate by more than fifty percent (excluding taxes), provided the conference rate was obtained when registering.

Procedure

Travelers and travel arrangers are encouraged, but not obligated, to reserve lodging through Sanditz, as a number of discounted rates are available. Direct payment for most lodging expenses (including room & tax) can be made through Sanditz. To utilize the direct payment option, the KFS account number(s) must be provided to Sanditz when the reservation is made. When special conference or event lodging rates are available, special rate information must be provided to Sanditz at the time of booking.

Travelers must justify lodging expenses that exceed the federal per diem lodging rate by more than fifty percent by destination on the Travel WebForm and obtain approval from their Department Head, Director, or Dean. Travelers are encouraged to ask providers of lodging for discounts provided to governmental employees.

Federal per diem lodging rates are available through the Office of Travel Services Website or from the GSA at <http://www.gsa.gov/portal/content/104877>.

4b. IN-STATE LODGING

Subject to prior approval from the appropriate Department Head, Director, or Dean, travelers on University business may request reimbursement for lodging when the distance they are required to travel is more than 75 miles, one-way, from their official duty stations. However, if the traveler's destination is less than 75 miles from his or her personal residence, the traveler may not request reimbursement for lodging even if the mileage from the traveler's official duty station is 75 miles or greater.

Travelers may receive reimbursement for in-state lodging when attending a conference within the State of Connecticut, regardless of distance from official duty station.

A University guest staying in state is subject to the maximum lodging rate of fifty percent above the federal per diem rate by destination. Travel arrangers are encouraged to use the University's preferred agency to obtain the best rates available.

4c. USE OF NATHAN HALE INN

The University recognizes that, from time to time, it may be important and in the best interests of the University to provide on campus lodging to certain individuals. The maximum rates for lodging and subsistence meals do not apply to the Nathan Hale Inn. Please note, however, that cancellations within 24 hours prior to arrival (noting that the current check-in time is 3:00 pm) are subject to a one night cancellation fee.

University Guests, Candidates, Recruits and Affiliates

Lodging and meals can be provided to University guests, such as candidates, recruits and affiliates, through a direct billing.

University Employees

In rare circumstances, a University employee may require lodging at the Nathan Hale Inn in order to carry out his or her duties as a University employee. In these cases, the employee must receive prior approval for the stay from the Office of the President, the Provost, the Executive Vice President for Administration and Chief Financial Officer, or Athletic Director, based on the reporting relationship of the employee.

Procedure

The Nathan Hale Inn requires a KFS reservation form for reserving direct payment for lodging and meal expenses. The form must be completed and e-mailed to the front desk at the Nathan Hale Inn and Conference Center (frontdesk@nathanhaleinn.com). The form can be obtained by contacting the Nathan Hale Inn via e-mail or by telephone (860-427-7888).

4d. GROUP LODGING

“Group lodging” is defined, for the purposes of this policy, as the booking of 10 rooms or more for a specified University travel need.

Group lodging having a total cost of \$10,000 or more must be arranged through the University Purchasing Department. Business units arranging group travel in excess of \$10,000 are also required to solicit competing bids from a minimum of three providers in the proximity of the travel destination. For all other group lodging arrangements, business units are still urged, but not required, to contact the Purchasing Department for assistance.

Procedure

Group Lodging (under \$10,000): Travelers should contact Sanditz directly via phone for assistance with booking needs. If personal funds are not used, then the request must be processed through the Purchasing Department as a purchase order. Even if not required Purchasing expertise should be utilized for group hotel contracts consisting of 10 rooms even if under \$10,000.

Group Lodging (over \$10,000): Group lodging in excess of \$10,000 requires a purchase order to be processed through the Purchasing Department. A minimum of three written quotes must be secured directly from the hotels or from Sanditz. These quotes must itemize all foreseeable group expenses for the group’s stay and related functions. If the unit does not select the lowest bidder, or if three properties are not available, the unit must provide a written explanation to justify the choice of lodging. The unit must process a requisition and attach the justification and relevant documentation with the contract. The Purchasing Department will issue a purchase order upon full compliance.

PART 5: MEALS

5a. MEALS FOR UNCLASSIFIED EMPLOYEES (WHILE TRAVELING)

Travelers in the following categories may claim reimbursement for the actual cost of their meals (substantiated with original receipts) or they may claim reimbursement using the per diem method; provided, however, that travelers may be required by their respective departments or business units to use a particular method.

- x AAUP
- x UCPEA
- x Managerial and Confidential NP Plan
- x Managerial and Confidential
- x UConn Non-Represented (Dining Services)
- x Special Payroll Employees
- x Students

Travelers must use one method of reimbursement for the entire trip. **The total reimbursement for actual meal costs over the course of travel may not exceed the amount that would have been reimbursable based on daily per diem rates over the same time period.**

The provisions and procedures of this section also apply generally to athletic team travel. However, due to the special nutritional needs of the University's athletes and the demands of their training and schedules, additional meals or per diems for student athletes, if made in accordance with NCAA rules and limits, are allowable under this policy without the need for an exception or higher level approval.

Procedure

Travelers must indicate departure and return times on the Travel WebForm. Meals for out-of-state travel are reimbursable according to the following time schedule:

REIMBURSABLE MEAL	DAY OF DEPARTURE (DEPARTING BEFORE)	DAY OF RETURN (ARRIVING AFTER)
Breakfast	7:00 A.M.	9:00 A.M.
Lunch	11:00 A.M.	2:00 P.M.
Dinner	5:00 P.M.	7:00 P.M.

Reimbursement by per diem:

Travelers claiming up to the per diem reimbursement (discussed in greater detail below) do not need to provide receipts for their meals to the University Office of Travel Services. Please note, however, that travelers may be required by their respective departments or business units to provide receipts. It is advisable, therefore, for travelers to discuss meal reimbursements with their departments or business units before travelling.

Travelers may receive per diem meal reimbursements, including tax and tips, at the appropriate rates as published by the GSA: <http://www.gsa.gov/portal/content/104877>. The full daily per diem rate is applicable for a day of travel during which a traveler is away from before 7:00 A.M. until after 7:00 P.M. On the day of departure and day of return, travelers must deduct the allowable per diem for meals before they leave and after they arrive, respectively, according to the departure time and arrival timetable above. Meals are broken down by breakfast, lunch and dinner in the per diem rate table as published on the website. See section 5d and 5e below for limitations on per diem.

Gratuities for maid service, baggage handling, etc. are included in the incidental expenses portion of the per diem.

5b. MEALS FOR CLASSIFIED EMPLOYEES (WHILE TRAVELING)

By statute, employees, through their legally designated representatives, have the right to bargain with the State concerning travel expenses. Accordingly, some collective bargaining contracts may contain provisions that vary from the reimbursement policies contained herein. **For such cases, collective bargaining contracts take precedence.** For more information about what travel rules apply under what circumstances, travelers should contact Human Resources. Travel reimbursement rates for employees in P-2, NP-5, NP-3 and NP-2 bargaining units are found within each current bargaining unit contract at: <http://lr.uconn.edu/resources/collective-bargaining-agreements/>.

Travelers in the above referenced categories may claim reimbursement up to the amount defined in the appropriate bargaining unit contract, less any meals provided and/or any amount funded directly by the collective bargaining unit.

Procedure

Reimbursement by per diem:

Travelers may receive per diem meal reimbursements as allowed by Union contracts (including tax and tips) dependent on the locality. Detailed listings of the per diem rates are available at: <http://www.gsa.gov/portal/content/104877>. The full daily per diem rate is applicable for a day of travel during which a traveler is away from before 7:00 A.M. until after 7:00 P.M. On the day of departure and day of return, travelers must deduct the allowable per diem for meals before they leave and after they arrive, respectively, according to the departure time and arrival timetable above. Travelers who claim per diem reimbursement do not need to provide receipts for their meals. See section 5d and 5e below for limitations on per diem. All expenses are only eligible for reimbursement based upon funding. Departments are still allowed to request that travelers hand in receipts in order to limit expenses.

5c. MEAL EXPENSES FOR SINGLE-DAY TRAVEL (NO OVERNIGHT)

Unless otherwise provided under Collective Bargaining Agreements, travelers who are required to travel for University business without an overnight stay may be eligible for meal reimbursement if the traveler is away from his or her home and official duty station for more than ten hours and the reimbursement requests are occasional and non-routine. In such situations, employees are entitled to reimbursement for lunch. In addition, employees who depart their homes or official duty stations prior to 7:00 a.m. are entitled to reimbursement for breakfast. Employees who return to their homes or official duty stations after 7:00 p.m. are entitled to reimbursement for dinner. All of such meal reimbursements are subject to approval by the appropriate Department Head, Director, or Dean.

Receipts are not required. Travelers must note times of departure and return on the Travel WebForm to substantiate meals eligible for reimbursement.

In these instances, the following per diem rates apply: 75% of the GSA per diem meal rate in effect for destination of travel.

5d. CONFERENCE AND OTHER MEALS PROVIDED

Conferences frequently provide meals to attendees as part of the registration fee. As discussed below, the traveler is generally not entitled to a meal per diem allowance for meals that are included as part of the registration fee. The same is true for any meetings or group travel event in which a meal is provided or where the traveler has been included on a list of attendees for a business expense, or where meals are provided complimentary as part of the transportation or hotel accommodations.

Procedure

When completing the Travel WebForm, travelers who attend conferences or other functions must indicate which meals were provided to them, if any. A travelers should note, however, that he or she may be reimbursed for meals that were offered, but not accepted for reasons such as:

- x The traveler has a special dietary need or restriction, including religious;
 - x The traveler had to attend a business meeting during the time that the meal was offered; or
 - x The meal was not an open event, and the traveler was not invited.
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5e. BUSINESS MEALS

From time to time, it is necessary to the interests of the University to host or provide meals to guests such as job candidates, visiting scholars or donors. Likewise, a meal may be an essential or important part of an event, such as a conference or workshop, which is conducted by the University. In cases where the University provides a meal (or reimburses the expense of the meal, as the case may be) to individual(s) who are not travelling on behalf of the University (herein defined broadly as “business meals”), the University will pay or reimburse the business meal under the requirements and procedures under this section.

As a public agency, the University has an obligation to students, taxpayers and benefactors to use all of its funds as prudently as possible. Therefore, all employees and individuals with authority to request, control or approve University funds, including but not limited to travelers, shall use their best judgment in applying those funds towards business meals only when justified with a business purpose and a clearly identifiable benefit to the University. The act of requesting, using or approving a business meal constitutes an individual’s official determination that, to the best of such individual’s knowledge, the expense was actually incurred, is justified by a business purpose, and serves the best interests of the University.

The University’s policy of paying or reimbursing for business meals is subject to the following general rules:

1. University employees are generally responsible for paying for their own meals when they are not traveling.
2. University funds may not be used for meals at social functions, such as parties or summer outings, attended entirely or primarily by University employees and/or their personal guests.
3. University funds may not be used to purchase alcoholic beverages.
4. In most cases, business meals may not be charged to sponsored awards (the responsible OVPR, SPS Grant Manager may provide more information or grant exceptions where appropriate).

Meals between faculty/staff and students, while allowable when there is a business justification, should be infrequent. In addition, units may purchase group business meals when a group meal is essential to the effectiveness and efficiency of the meeting. This is especially the case when multiple units are called together for a substantial meeting, or when stopping the meeting to allow employees to leave for a normal meal would be disruptive and inconvenient for the University.

For the avoidance of doubt, this policy shall extend fully to business meals that are paid for by interdepartmental transactions, such as meals purchased through Dining Services (including Chuck and Augie’s).

While the University Office of Travel Services does not require written preapproval for business meals, University staff are strongly encouraged to obtain written departmental approval before incurring any business meal expenses. Individuals who incur business meal expenses without the approval of their departments bear the risk that their expenses will not be reimbursed.

For all business meals, including group meals, organizers should limit attendance to essential guests only. Without proper justification, the University will not reimburse expenses for spouses, partners or non-essential guests. Under no circumstances may the cost of the meal for each guest (including taxes and tip) exceed three times the appropriate GSA Per Diem meal amount for the location.

For the purposes of this policy, business meals shall not include refreshments, such as snacks or nonalcoholic beverages, which are made available to guests outside of the context of a meal. Such refreshments may be provided in appropriate business contexts, provided that the cost of providing refreshments, when combined with any meals served, is less than the applicable GSA meal rate (inclusive of incidental costs, such as set up, delivery, and service charges). For example, refreshments provided before a morning meeting at the Storrs campus cannot exceed the allowed breakfast per diem expense (currently \$7 for FY15). Refreshment transactions must also be justified by a business purpose and require the attendee list, and per person breakdown before the costs may be paid or reimbursed.

Note that the provisions in this section shall not be construed as to supersede the provisions of any collective bargaining agreement.

Procedure

Departments with ability to control or request Foundation funds are encouraged to consider use of these funds as the primary reimbursement method to cover the expense of business meals.

If Foundation funds are not used, employees may request reimbursement for business meals by attaching the Business Meal Detail Form available at <http://travel.uconn.edu/> with the original itemized receipt and proof of payment to the reimbursement request. Note that the Business Meal Detail form requires written approval for the meal from the Department Head, Director, or Dean. This form must also include the date, location, business purpose, names of attendees and their affiliation to the University and the actual cost of the meal per person.

For authorized business meals at the Nathan Hale Inn and Conference Center and Chuck & Augie's restaurant, a Meal Charge Ticket allows departments to charge the meal to a KFS account. The Business Meal Detail form is not required if payments are made using a Meal Charge Ticket as this contains the same information needed as the Business Meal Detail form. The appropriate Department Head, Director, or Dean must sign the completed meal tickets before transactions can be finalized by the Travel Office.

Finally, for reference, the GSA Per Diem tables are available at: <http://www.gsa.gov/portal/content/104877>.

Units that want to contract for catering services for a group meal that will cost more than \$2,000 should refer to UConn's Purchasing Department for guidance.

5f. GRATUITIES FOR MEALS

Travelers who use the per diem method for meal reimbursement may not seek additional reimbursement for meal gratuities, as the per diem rates are calculated to include an allowance for meal gratuities. In all other cases, however, gratuities for meals and business meals are reimbursable at a rate not to exceed 20% of the pre-tax meal cost, except in cases where a vendor stipulates a gratuity and reflects it in the bill as a service charge. In

such cases, any additional gratuity is not reimbursable. The employee may be responsible for reimbursing the gratuity to the University when the employee authorized billing to the University beyond 20% of the pre-tax meal or the vendor service charge. Please note that Chuck and Augie's has a no tipping policy, therefore, gratuities for meals at Chuck and Augie's will not be reimbursed or paid by the University.

PART 6: OTHER EXPENSES

6a. REGISTRATION FEES

Travelers may use University funds to pre-pay conference registration fees. Alternatively, travelers may be reimbursed for registration fees.

Sometimes meals, hotel accommodations, or additional fees for other goods and services may be included in a registration fee. Travelers will not be reimbursed separately for these—that is, travelers will not be reimbursed twice for the same thing. See Sections 5d and 5e for further details on meals provided with conference registration and business meals.

Procedure

Travelers may use the following methods to pay registration fees:

x Payment with University Procurement Card (Preferred Method)

To use the procurement card, travelers and administrators should follow the rules and regulations for use of the procurement card (available at <http://www.purchasing.uconn.edu/>).

x Personal Payments for Registration Fees

Travelers who pay registration fees themselves must attach all receipts and appropriate documentation to the Disbursement Voucher in KFS.

x Office of Travel Services Checks

If no other options are available, the Office of Travel Services can process a check to prepay registration fees. Travelers requesting prepayment of registration fees must do so by completing and submitting the Travel WebForm.

Regardless of how registration fees are paid, travelers must attach applicable receipts and conference agendas to the Travel WebForm in order to be reimbursed. If other fees, meals, hotel accommodations, or other goods and services are included in the registration fee, the documentation should reflect this. If a program or schedule is not available, then the traveler may submit a simple written statement indicating whether and to what expense such additional goods or services were provided as part of the conference.

6b. TELEPHONE, INTERNET, COMPUTER, AND FACSIMILE CHARGES WHILE TRAVELING

Charges for telephone calls made for official University business while traveling are reimbursable, unless the employee has a University issued cell phone or cell phone stipend that includes a voice tier option.

Travelers may receive reimbursement for charges for internet access, use of a fax machine, use of a computer, and other similar business services while traveling on University business. Translation charges are also eligible for reimbursement, provided however, that the traveler must additionally provide a documentation establishing the charges as having actually been paid (e.g., a credit card statement).

Procedure

Travelers should submit documentation and receipts for expenses incurred for these services with the Travel WebForm. When available, individual call destination and rates must be supplied with only business related calls claimed for reimbursement. For international travel, flat rate of data, text, and voice is charged by many service providers. The full amount is eligible for reimbursement, prorated by any personal travel during the trip.

6c. FOREIGN CURRENCY RATES AND PER DIEM REIMBURSEMENT

When traveling outside the U.S., travelers will receive the foreign per diem rates for the duration of their trip. Of note, foreign per diem rates include a significant daily incidental expense reimbursement for items such as laundry and dry cleaning.

Travelers will be reimbursed for expenses paid in foreign currencies, and for currency exchange fees, based on the exchange rate for the date marked on their receipts.

Procedure

Travelers may account for currency conversion in one of two ways:

1. Converting each receipt to U.S. dollars using the exchange rate for the date marked on their receipts.
 2. Including the transaction detail that documents the actual U.S. dollar amount charged from a debit or credit account statement.
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6d. PRESCRIPTIONS AND MEDICAL EXPENSES FOR INTERNATIONAL TRAVEL

When preparing to travel internationally on University business, travelers are eligible to be reimbursed for any out-of-pocket medical expenses related to the trip such as prescriptions, vaccinations, medical co-pays or additional insurance costs.

Procedure

Travelers should submit documentation and receipts for expenses incurred for these services with the Travel WebForm.

