

Tuskegee University Travel Policy

Purpose

Tuskegee University's travel policy is designed to provide guidance for those traveling on University business and ensure the best use of the university resources. The travel policy applies to faculty, staff, visiting scholars, students and non-university personnel traveling or using funds administered by Tuskegee University.

Policy Statement

Guiding principles:

1. Support the productivity and safety of those traveling on University business
2. Ensure compliance with external and internal requirements
3. Use University resources wisely

General considerations:

- Travelers should neither gain nor lose personal funds as a result of business travel on behalf of Tuskegee University.
- Be sure to have necessary approvals and travel documents in order prior to your travel.
- Book airline tickets as far in advance as possible (at least 30 days) in order to obtain advance purchase discounts and optimal travel times.

Policy

1. PRE- AND POST-TRIP PLANNING

a. Funding Sources

University travelers are responsible for understanding and adhering to specific restrictions that may be required by the funder. These restrictions supersede any restrictions outlined in this policy.

b. Alternative to Travel

Please consider videoconferencing or web conferencing as an alternative to travel. The University provides a variety of options, including desktop videoconferencing, videoconference rooms, etc. For more information please contact Campus Technology

c. Receipt Requirements

Original receipts for all expenditures are required

d. **Cash Advances**

Travelers may receive a cash advance to pay for travel expenses when other payment options (e.g. direct bill, credit card, etc.) are not available or do not meet business needs. Advances must be requested on a Check Request Form. Unspent funds must be returned to the Business Office. Cash advances must be properly substantiated and submitted within 15 days of travel

e. **Submission and Approval of Expenses**

All travel and entertainment related expenses must be substantiated in writing within 60 days after the expense is incurred or after returning from travel. Approvers are responsible for verifying that funds are available for the trip and that any required special approvals have been obtained prior to departure (e.g., approval for foreign travel under sponsored projects). Approval of the Business Travel Expense Report will be taken as evidence of the reasonableness of the claim, the availability of funds, and the necessity of the trip in furtherance of University business.

- f. Travel funded by Federally Funded Sponsored Awards is required by 49 U.S.C. 40118, commonly referred to as the "Fly America Act," to use United States air carrier service for all air travel and cargo transportation services funded by the United States Government. One exception to the requirements of the Fly America Act is transportation provided under a bilateral or unilateral air transport "Open Skies" agreement. An Open Skies Agreement is an 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. It should be noted that Open Skies Agreements cannot be applied to travel supported by Department of Defense funding. Certain expenditures (e.g., alcohol) are generally "unallowable" expenses in accordance with federal cost principles.

When foreign travel is charged to a federally funded sponsored project or program, please submit the Fly America waiver check list form.

Pre-Trip Approval

The traveler is responsible for ensuring that they have the necessary approval from their immediate supervisor and the unit head to take the trip. All travel requests also should be coordinated with the CFO or Budget Officer to ensure that funds are available.

g. **Federally Funded or Non-Federally Funded Sponsored Projects or Programs**

In order for sponsored project or program funds to pay for travel to scientific, technical, or scholarly meetings, the trip must be approved by the principal investigator as being of definite value to the work covered under the sponsor award. In certain cases, the principal investigator may need to seek sponsor approval for the trip. Sponsor approval

requests should be coordinated well in advance of the trip through the Office of the Sponsored and Research Program.

h.

Normally, travel to scientific and scholarly meetings at the sponsor's expense will be limited to project personnel. However, other factors such as the size of the project and the agenda of the meeting may justify sending additional participants. Travel costs incurred by large groups for special activities of the project must be approved in writing by the sponsoring agency and the principal investigator. When a large group attends a scientific meeting, an attempt should be made to obtain reduced rates for travel and hotel accommodations.

i. **Tax**

U.S. Sales, Occupancy, and Other Tax

The University is a non-profit 501(c) (3) institution, and as such is exempt from tax on most domestic purchases. However, tax exemptions vary by state and by type of good or service purchased. University business travelers must make every reasonable effort to ensure that tax is not paid. For more information on tax exemptions, including a list of exemption certificates by state, see: Sales Tax Exemptions.

Foreign Value Added Tax (VAT) and Goods and Services Tax (GST)

Foreign tax, including VAT and GST is an allowable business expense.

j. **Passports and Visas**

Expenses related to visas and passports required for business travel are allowable expenses.

k. **Vaccinations**

Expenses for vaccinations required for business travel are allowable expenses. University travelers are strongly encouraged to obtain vaccinations prior to travel

l. **Accidents, Thefts, and Other Safety Issues**

Accidents, thefts, and other crimes while traveling on university business must be reported immediately to the University's Department of Public Safety and to your home department as soon as possible.

m. **Exceptions to Policy**

There may be unique and valid business needs which require exception to this policy. Exceptions must meet a valid business need and not simply a traveler preference, and must be requested prior to incurring the expense. Exceptions must be properly documented on the Business Expense Report.

n. **Travel Reimbursed by an Outside Entity**

When travel (not part of a sponsored project or program) is being paid for by an outside entity, the expenses should be paid for directly by the outside entity. When expenses are not paid for directly by the outside entity, the traveler is responsible for completing a business travel expense report and indicating that the expense will be reimbursed by an outside entity. In these cases, the department is responsible for billing the outside entity and for ensuring the appropriate funds are received.

o. **Personal Travel**

If personal travel is combined with University business travel, only the business portion of the trip is an allowable expense. Personal expenses should be paid for using personal credit cards or other methods that do not result in the University paying for the personal expense. "In lieu of" and "tradeoff" expense reimbursement is not allowed (e.g., although incurring a Saturday stay reduces the cost of your flight, you may not use the difference to offset all or part of your personal expenses).

2. **BOOKING RESERVATION**

Travel Agency

The use of a travel agency is optional. The University has a travel agency. If you decide to use an agency other than the University's travel agency, and you are using sponsored funds, please be sure that the agency is both "Fly America" certified and "Open Skies" certified. However, direct online purchases are highly encouraged.

The following is the contact information of University's Travel Agent:

UNIVERSAL TRAVEL
c/o Ms. Deborah Lee
2771 LAWRENCEVILLE HWY STE 110
DECATUR GA 30033
[770-879-0371](tel:770-879-0371)
[800-573-2916](tel:800-573-2916)
FX [770-234-6835](tel:770-234-6835)
dleetravel1@gmail.com

a. **Reservation Timing**

Travel planning should be completed as far in advance as possible. Advance travel planning is key to obtaining the lowest airfares and securing first choice flight times and room accommodations. Reservations should be made at least two weeks in advance.

b. **Frequent Flyer/Guest/Reward Points**

Employees may keep all rewards related to travel (e.g., Delta Sky Miles, Marriot Rewards, etc.). Enrollment fees for these programs are a personal expense and are not reimbursable.

c. **Itinerary Changes**

Fees associated with changes, provided there is a business reason, will be reimbursed.

To be allowable on a sponsored research project, the change fee must be justified as having a direct benefit to the research.

3. AIR TRAVEL

a. **Booking Airfare**

Reservations should be made at least 30 days in advance to ensure the most convenient and cost effective fares. Transaction fees associated with business travel reservations are reimbursable.

b. **Airline Requirements for Federally Funded Sponsored Research Projects**

Under the Fly America Act (FAA), government regulations require the use of a U.S. air carrier when traveling outside the U.S. In some instances, a non-U.S. air carrier may be used if it meets one or more of the exception criteria listed in the Federal Travel Regulation (FTR) guidelines section 301-10.135-138. The Waiver of Fly America Act lists all available exceptions, which include Code Share and Open Skies Agreements. Note that some federal agencies consider Canada, Mexico, and/or U.S. Territories as “foreign”. If the award terms and conditions do not specifically indicate that travel to/from Canada, Puerto Rico, or Mexico is considered as domestic travel, the trip is considered to be foreign travel.

Code Share Agreement

The Code Share Agreement provides for compliance with the Fly America Act if the U.S. air carrier is the ticketing agent and issues a flight on a non-U.S. air carrier. The payment for the airfare must be made to the U.S. air carrier. If a non-U.S. air carrier is the ticketing agent, the flight is considered a non-U.S. air carrier flight and is in violation of the Fly America Act.

Open Skies Agreements

Open Skies Agreements provides that qualifying travelers, whose travel is supported by federal funds, may travel on airlines from the European Union, Australia, Switzerland and Japan as well as U.S. Flag Air Carriers. For the Open Skies Agreements exception to be allowed and selected in the Waiver of Fly America Act, the following circumstances must be met, without exception:

1. Travel is not being reimbursed using Department of State (including all of the Department of Defense) funding; and
2. Travel is booked by an approved University Travel Agency, which has the certification of compliance with the Open Skies Agreement.

c. **Fares/Ticket Types**

Non-refundable fares should be booked in the majority of cases. Non-refundable tickets can cost up to 70% less than refundable tickets. Change fees on non-refundable tickets are an appropriate business expense.

Class of Service

Travelers must purchase the lowest available economy class airfare that meets the needs of the business trip. Travelers may upgrade the level of service at personal expense or by using their

“frequent flyer” points, except as outlined below.

Exceptions:

Economy class upgrades (e.g., Economy Plus, exit row, aisle seat, etc.) are an allowable expense.

Business class/First Class travels are not allowable; however, a medical justification from the primary care physician may be considered for reimbursement.

Upgrades

Costs associated with upgrades to business/first class are not an allowable business expense, except as outlined above.

Changes, Cancellations, and Unused Tickets

When travel plans must be changed due to unforeseen circumstances, the traveler is responsible for notifying the airline or travel agency that booked the ticket. Apply the unused ticket to the next business trip.

Penalties for changes to an airline ticket for business reasons or circumstances beyond the traveler’s control are allowable expenses. For tickets purchased using federally-sponsored funds, contact the Office of Sponsored and Research Program to determine if the penalty may be charged to the grant.

Unused tickets cannot be used for personal travel.

Airline Clubs

Airline club membership is not an allowable business expense.

Baggage

Charges for baggage that is reasonable and appropriate for the purpose and length of the trip are allowable. Charges for baggage that is personal in nature (e.g. golf clubs for a business trip) or that is not reasonable and appropriate for the purpose and length of the trip, is not allowable.

Private Plane

In general, Tuskegee University faculty and staff members are prohibited from using noncommercial (private/corporate/state owned, rented, or borrowed) aircraft (fixed - wing or rotary) for university business travel.

HOTELS

Reservations

Reservations may be made through the University travel agency, by using an online booking Web site, or by contacting the hotel directly.

The itemized hotel bill must always be provided.

Travelers must cancel reservations to avoid no-show charges. If incurred, these fees are not an allowable business expense.

Hotel Class and Rooms

The class of hotel must be reasonable and appropriate for the business purpose and location. University travelers should stay in standard rooms only. Suites and other upgraded rooms are not allowable expenses. If there is a valid business need for a non-standard room, the business purpose must be documented and approval must be granted in advance by the supervisor.

Upgrades

Travelers may only accept complimentary upgrades. Costs associated with upgrades are not an allowable business expense.

Hotel Exercise Facility/Gym

When exercise facilities are not provided for free by the hotel, the fee for the gym is not an allowable business expense

In-Room Movies

In-room movies are not an allowable business expense.

Laundry and Dry Cleaning

Laundry and/or dry cleaning charges will be reimbursed when an employee travels for 4 or more consecutive nights. The charge must be incurred while traveling (not after the trip is complete). If claiming a per diem for international travel, laundry is included in the per diem rate and may not be claimed as a separate expense.

Lodging at Private Residences

Although travelers may stay at private residences, this is not encouraged. Gifts in lieu of lodging are not an allowable expense and will not be reimbursed.

Room Service

Room service is allowed but is limited to the Meal Allowance amounts.

CAR RENTAL

When to Use

Rental cars should be used when they are less expensive than alternative means of transportation (e.g., taxi, car service, or train) or where there are convenience or safety issues that justify the additional cost.

Tuskegee University's Preferred Rental Agencies

The travelers should make every effort to use the University's preferred rental agencies for cost savings.

Car Class

Rental of up to a mid-sized car is an allowable expense. Exceptions may be made if there are three or more employees traveling together, if the traveler is transporting sizeable equipment, or if there are other valid business needs. The exception must be documented on the traveler's expense report.

Motorcycle/moped rentals or vehicle upgrades are not an allowable business expenses.

Insurance

While on domestic University business, decline Collision Damage Waiver (CDW) and personal liability insurance offered through the rental company.

When renting vehicles in a foreign country, collision auto liability insurance options should be accepted.

Gasoline

Employees are expected to refuel the rental car prior to returning to the rental agency and to decline the pre-paid fuel options. The cost of fuel is an allowable expense.

Incidental Expenses

All business-related tolls and parking charges that are not part of employee's regular commute are allowable expenses.

Tickets or fines associated with parking or travel violations, and charges for vehicle lockouts are not allowable expenses.

TAXIS

When to Use

Taxis should be used for in-city destinations whenever possible, unless a rental car or other means of transport is more cost effective or where there are convenience or safety issues that justify the additional cost.

Tips

It is customary to provide a tip to for taxi service of approximately 15%. A reasonable tip for taxi service is an allowable expense.

Payment

When possible, use a taxi service that accepts credit card payment and include the tip in the charge.

LIMOUSINE & SHUTTLE SERVICE

When to Use

Limousine and shuttle services should be used when they are less expensive than alternative means of transportation (e.g., train, taxi, or personal auto) or when there are convenience or safety issues that justify the additional cost. When traveling with others, it is often more economical to coordinate travel times and share a limousine or shuttle service.

Payment

Travelers can use personal credit cards (which will be reimbursed or university's check to pay for the rental).

PERSONAL AUTOMOBILE

Acceptable Usage

Use of personal auto for business purposes is allowed when it is less expensive than alternative means of transportation or when there are convenience or safety issues that justify the additional cost. Use of personal automobile for normal commute is not an allowable expense.

Mileage Reimbursement

If a personal automobile is used for business purposes, you will be reimbursed at the current IRS authorized mileage rate for miles incurred in excess of your normal commute. The personal mileage reimbursement covers all costs related to the operation of the vehicle, including service, maintenance, insurance, depreciation, and gas.

Gasoline

The price of the gas is factored into the mileage reimbursement rate and is therefore not an allowable expense when traveling by personal automobile.

Tolls

All tolls incurred while traveling for business are allowable expenses. This does not include tolls incurred for normal commute.

Parking

All parking for business purposes are allowable expenses. Commute-related parking charges are not allowable expenses.

Maintenance/Repairs/Fines

Regular car maintenance, fines, penalties, towing, and repairs are not allowable expenses.

OTHER TRANSPORTATION

Rail

Travel by rail is allowed when it is less expensive than alternative means of transportation or when there are convenience or safety issues that justify the additional cost. Business Class travel is not allowable for rail travel. For international rail travel, travelers should purchase a fare that offers reserved seating. Often, reserved seating is only available in first class. Roomettes are allowable for overnight travel.

MEALS & ENTERTAINMENT

Individual Meals & Incidentals

University employees are encouraged to claim actual meal and incidental expenses (M&IE). When claiming actual meal and incidental expenses is impractical, employees may elect to claim a per diem.

Non-employees may only claim actual expenses. Actual daily expenses claimed should be reasonable and appropriate and typically should not be more than the corresponding per diem allowance. Travelers must use one method for the entire trip.

Per Diem Rates

When claiming per diem, use the federally published [domestic per diem](#) by using the following link:

http://www.gsa.gov/portal/content/104877?utm_source=OGP&utm_medium=print-radio&utm_term=perdiem&utm_campaign=shortcuts

or [foreign per diem rates](#) for meals and incidental expenses applicable for the city and dates of travel by using the following link:

http://aoprals.state.gov/web920/per_diem_action.asp?MenuHide=1&CountryCode=0000

When a meal is paid for by a host, included in a conference registration fee, or covered by another source, the per diem should not be claimed. On the first and last day of travel, the per diem should be calculated at 75%.

Incidental expenses included in the domestic per diem rates are tips for services (e.g. porters, baggage carriers, bellhops, and hotel maids). International per diem rates include laundry and dry cleaning in addition to tips for services. These incidental expenses may not be claimed separately.

Group Meals and Entertainment

In situations where an individual is conducting business with one or more guests, reasonable meals and entertainment expenses are allowable except where noted below. Business meals and entertainment must be directly related to University business.

The University expects the cost of business meals to be reasonable and to be \$125 or less per person (including tax and tip). When sound business reasons necessitate that business meals exceed \$125 per person, the excess cost of the business meal must be approved by the supervisors. Costs in excess of \$150 per person will not be allowed.

Entertainment of government personnel is not allowed, even if the expense is charged to a non-sponsored fund. Entertainment costs are not allowable on federally funded sponsored research projects.

Alcohol

The purchase and use of alcohol places significant legal exposure on the University. Therefore the use of alcohol for business meals and entertainment purposes should be kept to a minimum. Alcohol may never be charged to federally sponsored projects. Any meals being charged to a federal grant must have all alcohol clearly identified on the receipt by the traveler and must be charged to a non-federal funding source.

Documentation

The Internal Revenue Service requires all business meals and entertainment expenses to be properly documented. This includes a list of attendees including titles and affiliation, or identification of a discernible group, total number of attendees, and the business purpose of the meeting.

COMMUNICATIONS

Telephone Usage While Traveling

Travelers will be reimbursed for business phone calls that are reasonable and necessary for conducting business when the itemized hotel bill or an original phone bill with itemized calls is attached to the expense report. Use of air phones will not be reimbursed except in emergencies or extenuating circumstances. An explanation must be noted on the expense report.

Mobile Communication Devices

Travelers will not be reimbursed for the purchase of cell phones or accessories. Travelers are encouraged to plan ahead and secure a loaner device through the Office of Campus Technology if necessary and appropriate. Loaner devices may be available for both domestic and international travel.

Internet Access

Internet access (e.g., hotel, airport, hotspot, etc.) is an allowable expense provided that the access is necessary for business purposes and not personal use.

MISCELLANEOUS

Currency Conversion

Use the following web link to convert foreign currency when completing a business expense report:

<http://www.xe.com/currencyconverter/>

Use the exchange rate in effect for the date the expenditure was incurred.

UNALLOWABLE EXPENSES

All expenses incurred on university business should be reasonable and necessary. Examples of non-reimbursable expenses include but are not limited to the following:

Annual fees for personal credit card

Hotel or car "no -show" charges without a business purpose

- Personal entertainment (e.g. sporting events)
- Babysitting
- In room entertainment (e.g., movies, games, etc.)
- Personal property insurance
- Barbers / hairdressers
- Membership (including airport clubs) and reward fees
- Pet care
- Car service for normal commute
- Meals for social occasions or Local meals with university Employees
- Prescription medication
- Car washes and detailing
- Non -business postage
- Shoeshine
- Clothing, luggage and toiletries

- Optional baggage insurance
- Souvenirs and personal gifts
- Personal mobile phones and data devices
- Parking and/or speeding tickets
- Vacation and personal expenses when on business trips
- Delinquency and late fees
- Personal accident insurance

Travel Reimbursement Process

The traveler will request reimbursement of all University-approved expenses to their supervisor with 30 days of travel. The traveler will be reimbursed only after verifying that all expenses are allowable under the University Travel Policy and that all required supporting documentation related to expenses has been provided and is valid.

Reimbursements will never be made prior to completion of travel.

The University will reimburse the traveler directly.