

Policy 3301 Travel on University Business

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Responsible Official	Associate Vice President for Administration and Controller	Last Revision	4/18/08

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Purpose and Scope

The purpose of this travel policy is to provide guidance for those traveling on Yale business. It is designed to ensure the best use of University resources; to encourage discretion as it relates to incurring costs when traveling on University business; to ensure compliance with applicable federal regulations and sponsored agreements; and to provide a clear and consistent understanding of the University's expectations pertaining to business travel.

This policy applies to any individual (faculty, staff or student) traveling on University business or using funds administered by Yale on trips of 30 days or less in duration. Longer trips and leaves of absence need to be discussed in advance with an Associate/Deputy Provost or Provost designee (for faculty, students and visiting scholars) or with the Controller (for staff and consultants) and appropriate approvals obtained.

Visiting students, scholars and other non-University personnel traveling on Yale business may be reimbursed for reasonable travel-related expenses in accordance with this policy.

Payments for reasonable travel-related expenses that are substantiated and made in accordance with this policy are not considered taxable income to the traveler.

This policy establishes basic guidelines and controls to be followed. Some schools or divisions of the University may impose more restrictive controls than required by this policy.

Policy Statement

The University appreciates the efforts of those who travel on University business. An individual traveling on University business should neither gain nor lose personal funds as a result of that travel.

Travelers should spend University funds prudently, understand all travel-related policies, and obtain reimbursement for their business travel expenses on a timely basis. Business travel expenses will be paid by the University only if they are reasonable, necessary, and in accordance with this policy.

General Guidelines

Reimbursement

Travelers are expected to submit reimbursement request with required supporting documentation within 10 business days of incurring the expense or returning from the trip.

Business Purpose

A clear and complete business purpose must be documented for each and every trip. The purpose should include the dates of the trip and enough supporting documentation to assist the approver, and any subsequent reviewer, to validate the business need for the trip. For example, when attending a conference or other event on Yale University business, supporting documentation (such as the conference brochure, itinerary or letter of invite), listing the date(s) and purpose of the event, should be attached to the expense report.

Restrictions for Travelers who are Not US Citizens or Permanent Residents

Individuals who are not citizens or permanent residents of the United States are subject to specific rules regarding payments. Please refer to the [Check Request for International Payees](#) to determine any payment restrictions and documentation requirements. Please review the restrictions prior to a trip.

Travel funded by Grants and Contracts

- Travel funded by federally-sponsored grants and contracts is generally subject to the [Fly America Act](#) which states that, with few exceptions, the air travel must be booked on an American Flag Carrier (e.g., United not Lufthansa, Delta not Air France).
- Certain expenditures (e.g., alcohol) are generally deemed to be “unallowable” expenses in accordance with federal cost principles. Such expenses may be reimbursed under specific circumstances, as long as the expense is reasonable and coded to the proper account number as described in the University’s Chart of Accounts.
- For further information, refer to section 3301.9 in this policy or consult Guide [1305 GD.07 Determining Reasonableness, Allocability and Allowability of Costs for Federally Sponsored Awards](#).
- There may also be additional restrictions not specifically covered by this policy. Questions should be addressed to the appropriate Office of Grant and Contract Administration.

Determine Whether Travel Is Classified as Domestic or International

- Domestic travel is defined as travel within and between any of the 50 United States, Puerto Rico, U.S. Virgin Islands, travel between the United States and Canada and within Canada.
- International travel is any travel **outside** those specified above.

International Travel

If travel to a foreign destination is planned, the University’s [International Travel Policy](#) should be reviewed prior to the trip. The International Travel site also lists the countries where travel risks are particularly high.

Exceptions to Travel Policy (other than International Travel)

Exceptions to the policy must be approved in advance and in writing by an associate/deputy provost or provost designee (for faculty, students and visiting scholars) or by the controller (for staff & consultants). For exceptions to the Fly America Act, contact the appropriate Grants and Contract Administration Office.

Making Travel Reservations

Before Travel

Individuals should make reservations as soon as their travel plans are known, so that they can obtain advance purchase discounts. When convenient, travelers may consider modifying an itinerary (e.g., staying over on a Saturday night) when such a change results in airfare savings greater than the cost of

the additional hotel and food expenses: supporting documentation indicating savings should be attached to the expense report. If a travel itinerary is created to accommodate personal business, the traveler must pay the incremental cost resulting from such personal business and must clearly document the costs incurred, separating any personal expenses from University business expenses.

Travelers are expected to be prudent when selecting the appropriate type of transportation (i.e., air, rail, automobile, etc.) for their business trips. The type of transportation chosen should be the least costly, consistent with the itinerary and the particular business requirements of the trip.

Preferred Travel Agency and Online Booking Tool

Travelers are encouraged to use the University's preferred travel supplier [orbitzforbusiness](#) by contacting them directly. Travelers and arrangers will be able to take advantage of a complete offering of travel options and discounts, including University negotiated rates and low service fees.

Business Travelers Accompanied by Family Members and Other Companions

The University does not provide reimbursement for travel and entertainment expenses of family members and other companions who accompany University employees on business trips.

This policy does not preclude family members and other companions from accompanying travelers on business trips provided that all travel, meals, entertainment and other costs resulting from their presence are clearly documented and borne personally by the Yale traveler or companion. In all instances, the conduct of University business shall be of primary importance during business travel.

There are a limited number of situations in which there is a bona fide business purpose for the presence of spouses, family members or other travel companions on University trips. Such situations are generally limited to deans and officers when they are representing the University at fund raising events or hosting University business functions. These situations and requests for special exceptions should be approved in advance by an Officer, an Associate/Deputy Provost/Provost designee (for faculty, students and visiting scholars) or by the Controller (for staff and consultants). Approved exceptions must be documented in writing on the expense report.

Distinguished Visitors

The University recognizes that certain invited guests may require upgraded travel arrangements. These arrangements will be an exception to policy and should be approved in advance by an Associate/Deputy Provost/Provost designee (for faculty, students and visiting scholars) or by the Controller (for staff and consultants). Approved exceptions must be documented in writing on the expense report.

Consultants Traveling on University Business

Consultants traveling on University business will be reimbursed for reasonable and necessary business expenses. Provisions for such reimbursements should be incorporated into the consulting agreement. If the provisions for reimbursement are not authorized by contractual agreement they must be approved in advance by the department business office. For further information regarding consultants, refer to Policy [3210](#) *Consultants and Professional Service Agreements*.

Policy Sections

3301.1 Air Travel

Travelers are expected to book the lowest available economy class airfare, consistent with business requirements.

Although no single source (travel agency or online booking tool) can claim to have the lowest fares 100% of the time, the University's preferred travel supplier [orbitzforbusiness](#) provides the best overall value in most instances and travelers are encouraged to take advantage of the services and discounts provided through University-negotiated airline fares.

Note: Certain lower cost airlines may not be included in the searchable data base in the preferred travel supplier, e.g. Jet Blue, and Southwest. However, reservations can be made with the full service University preferred travel agency [orbitzforbusiness](#).

If a penalty is incurred due to a traveler violating airline ticketing rules, the traveler will be responsible for the additional cost; however, penalties for making changes to, or for not using, non-refundable tickets can be reimbursed if the penalty was unavoidable due to business reasons or if circumstances were beyond the traveler's control.

Some airlines charge for a second checked in bag. The University would reimburse that charge if the second bag is needed on a business trip. If the flight cost is charged to a federal grant, then this additional cost can also be charged. If the trip includes business and pleasure and if the second bag is used for pleasure (golf clubs or skis), then the extra charge will not be reimbursed by the University.

Whenever possible, make travel plans early enough to book flights at least fourteen days in advance. This will allow one to take advantage of special advance purchase fares.

Use e-tickets when they are available. Most airlines impose a fee for paper tickets and their related shipping costs.

Class of Air Service

- **Domestic travel**
For domestic travel, use the lowest available economy class airfare that meets the needs of a business trip, consistent with business requirements. Travelers may upgrade the level of service at personal expense or by using their "frequent flyer" points.
- **International Travel**
For international travel, fly economy class for all flights under 5,000 miles (one-way). Travelers may upgrade the level of service at personal expense or by using their "frequent flyer" points. For flights at or over 5,000 miles (one-way), business class may be used if funds are available and authorized by the funding source; confirm with your business office that appropriate funds are available before purchase.

Students must travel economy class regardless of duration or length of the flight.
- **Extenuating Circumstances/Exceptions**
Sometimes, extenuating circumstances, such as a medical condition, may justify the use of business class for trips that are less than 5,000 miles (one-way). Approval must be obtained in advance and in writing by an associate/deputy provost or provost designee (for faculty and visiting scholars) or by the controller (for staff and consultants). Approved exceptions must be documented on the expense report.
- **On Federally Sponsored Funds**
Federal regulations almost always prohibit the charging of business or first-class air travel to federally-sponsored projects. They also prohibit reimbursing the differential between economy class fare and a business class fare in indirect costs. For details, see travel Procedure [3301 PR.01](#).

Air travel funded by federally-sponsored grants and contracts is generally subject to the Fly America Act which means that, with few exceptions, domestic and international air travel must be booked on an American Flag Carrier (e.g., United not Lufthansa, Delta not Air France).

There may also be additional restrictions not specifically covered by this policy. Questions should be addressed to the appropriate Office of Grant and Contract Administration.

Unused Tickets or Changes

When travel plans must be changed due to unforeseen circumstances, the traveler is responsible

for notifying Orbitz For Business, or the airline or travel agency that booked the ticket. Request a refund (in cases where a refundable ticket was issued) or applying the unused ticket to the next business trip. Flights must be cancelled prior to flight departure time.

Penalties incurred for changes to an airline ticket for business reasons or circumstances beyond the traveler's control will be reimbursed. If the ticket was purchased using federally-sponsored funds, contact the appropriate Office of Grants and Contracts to find out if the penalty may be charged to the grant.

Unused tickets cannot be used for personal travel.

Charter and/or Private Aircraft

For the safety of travelers, the University does not recommend flying on charter and /or private aircraft. The University assumes no liability for death, personal injury, or property damage in connection with charter/private aircraft travel.

If a traveler finds it necessary to travel by private airplane due to unusual circumstances, an exception should be sought in advance from the Associate/Deputy Provost/Provost designee (for faculty and visiting scholars) or by the Controller (for staff and consultants). If the exception is granted, the Risk Management department must be notified before the flight for insurance purposes. When a private plane or charter aircraft is used primarily for the convenience of the traveler, reimbursement will not exceed the lowest available economy class airfare.

Frequent Flyer Programs and Upgrades

The University allows travelers to accrue their own frequent flier mileage for trips taken on University business. The University does not reimburse travelers for tickets purchased with frequent flyer miles.

Travelers may use their airline miles to upgrade as long as the airfare purchased is the lowest available economy class airfare; if the traveler chooses to purchase a more expensive airfare to obtain the upgrade, consistent with business requirements, the traveler must pay the difference between the lowest fare available and the fare purchased. The source of an upgrade must be noted on the expense report.

Airline Club Memberships

The University does not pay dues for membership in airline clubs, except in situations where an extraordinary amount of business travel is required as an integral part of an employee's job responsibilities. Any requests must be approved in writing by the Controller, prior to joining an airline club.

3301.2 Lodging

Travelers should choose a reasonably priced hotel with a single occupancy rate. For hotel reservations for University guests staying in New Haven, a list of preferred hotels with University contracts is available.

For lodging outside of New Haven, reservations should be made through the Yale preferred travel supplier using the online booking tool or through the full-service travel agency, unless the traveler is attending a conference or other meeting where hotel reservations are made via a housing bureau or conference sponsor.

Actual hotel expenses will be reimbursed. Federal per diem rates should not be used for lodging but only for meals. Please refer to Section 3301.7 for information on sales tax exemptions on hotel charges.

Travel greater than 30 days

If a business trip will be greater than 30 days, it needs pre-approval of the cognizant provost or provost designee. Reimbursement of actual lodging expenses will be up to 50% of the current

published federal per diem lodging rates, available at [domestic per diem](#) or [foreign per diem](#). The reimbursement limits apply for the entire duration of the trip, not just the portion of the trip greater than 30 days. Any exceptions to these reimbursement limits must be pre-approved by the cognizant provost for faculty and by the controller for staff.

Lodging in Private Residence

Travelers who stay in a private residence at no cost to the traveler, while traveling on business will be reimbursed for a reasonable token of appreciation (not to exceed \$100 per trip) for the courtesy of staying with the host. Proper documentation must be provided with the expense report and charges need to be coded to the unallowable travel [expenditure code](#).

Note: tokens of appreciation may never be charged to sponsored project funds.

Cancellations

If travel plans are changed, the traveler should make every reasonable effort to cancel hotel reservations in advance, to avoid any penalties charged by the hotel.

Penalties or cancellation fees incurred for changes to hotel reservations due to business reasons or circumstances beyond the traveler's control will be reimbursed. In certain limited situations penalties may be reimbursable under a federally-sponsored award; check with the appropriate Office of Grants and Contracts.

3301.3 Ground Transportation

General

Use the lowest cost ground transportation consistent with business needs. For example, many hotels offer free airport shuttles, which should be used whenever practical.

Rental Cars

The University has negotiated discounts with preferred rental car agencies. These discounts are available through Yale's preferred travel supplier using their online or full-service travel agency services. Travelers should rent the most economical (compact or midsize) vehicle consistent with business needs and travel circumstances. Please refer to [Policy 1705 Automobile Fleet, Rental and Safety Program](#) for more details on Insurance.

Insurance

- **Domestic Rentals:** Travelers should decline any additional insurance coverage offered by car rental companies; it is expensive and duplicates insurance already provided by Yale and will not be reimbursed.
- **International Rentals:** Travelers should accept liability and damage insurance coverage offered by the car rental company. The cost will be reimbursed to the traveler.
- **Who is covered:** The University has automobile insurance that covers University employees, (including casual employees and post doctoral associates), and post doctoral fellows traveling on University business.
- **Student Coverage:** Active undergraduate or graduate students traveling on University business and students renting vehicles on behalf of a student group registered with a Dean of Yale College or the Dean of Students, and recognized by Yale as an official student group are also covered for insurance if they have passed the Driver Safety Awareness program.
- **Coverage of Consultants and Others:** The University's automobile insurance coverage does not cover any outside consultants, independent contractors, vendors, visiting speakers or anyone else who is not a student, post doctoral fellow or an employee of the University. These individuals or the companies that they represent must provide \$1,000,000 of

automobile liability and physical damage insurance to protect against accidents that can occur with the rental car while performing business for the University. This insurance can be provided via their own automobile insurance policy or by the companies that they represent or by purchasing the insurance from the rental car agency.

- **Reporting an Accident:** If a rental car accident occurs, travelers must submit a written accident report to the rental car company, local authorities as required, and Yale's Risk Management Office.

Rental of 12 and 15 Passenger Vans

Yale does not permit the rental of 12 and 15 passenger vans because of the possibility of serious accidents and injury to passengers. The Office of Risk Management will not extend Yale's insurance to these vehicles.

Use of Personal Automobiles

Employees may use their personal vehicles for business purposes. The use of a personal vehicle for University business will be reimbursed at the federal mileage allowance rate for business travel published in the [Controller's Office Fact Sheet](#). This rate covers the cost of vehicle usage, including gasoline. In addition to this allowance, travelers will be reimbursed for tolls and reasonable parking fees.

Note: There is a limit on vehicle reimbursement of no more than the economy class airfare for a similar trip.

The University assumes no liability for any loss or damage to the employee's vehicle. If an accident occurs when a traveler is using his/her personal vehicle for business travel, the employee's personal automobile liability and physical damage insurance is primary.

Private Car Service

The decision to use a private car service should be made by the individual traveler and departmental business office, based on cost and business needs. A private sedan or town car service may be used when the cost is reasonable and consistent with business requirements. Use of a private stretch limousine should be limited to situations involving multiple passengers or exceptional circumstances, and must be documented on the expense report.

For a list of preferred vendors, refer to [car service vendors](#).

Train

Travelers should book service on Metro-North, Amtrak or Acela consistent with their business needs. University policy allows business class service on Amtrak or the lowest class of service (i.e. business class) on the Acela and has negotiated discount rates with Amtrak.

To take advantage of any University-negotiated discounts on Amtrak, travelers must make reservations using the University's preferred full-service travel agency. There is no charge for booking trains through this service.

3301.4 Business Meals and Entertainment

Individual Meals

Travelers will be reimbursed for reasonable actual meal expenses or they may opt for the Meals and Incidental Expense (M&IE) per diem allowance; travelers may not combine the two methods on the same trip. Incidental expenses included in the domestic per diem rates are tips for services and the International per diem rates are laundry, dry cleaning and tips for services. Laundry and dry cleaning are not included in the domestic per diem rates. As a guideline, actual meal expenses should not be greater than the per diem allowance set by the federal government for the city visited. (i.e. domestic per diem per federal government and international per diem per state department).

(M&IE) Per Diem Allowance:

- When it is not practical to claim actual meal expenses, employees may use the federally published [domestic per diem](#) or [foreign per diem](#) rates for meals and incidental expenses applicable for the city of travel.
- When a meal is paid by a host, or included in a conference registration fee, or covered by another source or when traveling for a partial day, the per diem should be reduced as follows: 20% for breakfast, 30% for lunch, and 50% for dinner.
- Use of either actual expense or per diem allowance for more than 30 days must be approved in advance by an Associate/Deputy Provost or Provost designee (for faculty, students and visiting scholars) or by the Controller (for staff and consultants). Approved exceptions must be in writing, and documented with the expense report.

Travel greater than 30 days

If a business trip will be greater than 30 days, it needs preapproval of the cognizant provost or provost designee. Reimbursement of meals for such trips will be available at 50% of the current published federal (M&IE) per diem allowance, available at [domestic per diem](#) or [foreign per diem](#) for the actual number of days that food expenses were incurred. The reimbursement limits apply for the entire duration of the trip, not just the portion of the trip greater than 30 days. Any exceptions to these reimbursement limits must be pre-approved by the cognizant provost for faculty and by the controller for staff.

Group Meals and Entertainment

In situations where an individual is conducting business with one or more guests, reasonable meals and entertainment expenses will be reimbursed. 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 \$100 or less per person (including tax and tip). When sound business reasons necessitate that business meals exceed \$100 per person, the excess cost of the business meal must be approved by the Professional Schools' Dean's offices or the Office of the Provost for faculty and visiting scholars and by the Controller's Office for staff and consultants. Unless the event is extremely unusual and pre-approved, costs in excess of \$150 per person will not be reimbursed.

The Internal Revenue Service requires all business meals and entertainment expenses to be properly documented. This includes the reason for the entertainment, the benefit expected to be derived as well as the name, title, and affiliation of the individual(s) being entertained. For more information refer to Policy [3302 Business Meals, Entertainment, and Other Social Events](#).

3301.5 Other Reimbursable Travel Expenses

The following additional expenses will be reimbursed if related to travel on University business:

- Fees that are incurred in obtaining a visa or other special fees (e.g., the transaction fees associated with currency conversion).
- Costs for vaccinations and other medications required for travel to other parts of the world.
- Reasonable telephone costs and internet charges incurred; however, Yale cell phones and Yale Bulldog Calling Cards should be used instead of the hotel room telephone for direct dialing of long-distance calls.
- When necessary, laundry and dry cleaning expenses when the domestic or international travel is for a period of five or more consecutive days and the amounts are reasonable; the traveler cannot claim laundry and dry cleaning expenses separately when the international per diem rate is used.

- Tips and gratuities when reasonable and accepted as standard practice (i.e., restaurants, ground transportation, bellhops, and hotel housekeepers). Tips are included in both the international and domestic per diem rate and therefore cannot be claimed separately when the per diem rate is used.

Personal expenses incurred while traveling on University business **will not be** reimbursed by the University (e.g., in-room movie rentals, in-room alcoholic beverages, babysitting, recreational activities, and issuance of passports or their renewals). See Guide [3301 GD.01](#) for a list of miscellaneous non-reimbursable travel expenses.

3301.6 Payment Methods and Documentation

Yale Purchasing Card Program

The Yale Purchasing Card is the preferred payment method for all travel purchases. This allows the University to be billed directly for travel expenses. Contact your business office or see **Procedure** 3215 PR.01 for details on how to enable the Yale Purchasing Card for travel.

Personal Funds

If a personal credit card, check or cash is used, the traveler must submit an expense report seeking reimbursement only after completion of the trip.

Receipts

For travel and entertainment expenses of \$75 or higher, original, detailed receipts must be provided to the departmental business office. An acceptable receipt is one that is printed on official letterhead or company stationary and that includes line item detail such as the date(s) and description of each expense. Where generic or hand-written receipts on plain paper are the only receipts available and the form of payment is a personal credit card, it is advisable to have additional supporting documentation (e.g., copy of credit card statement).

Receipts are not required for travel expenses of less than \$75. However, travelers are strongly advised to obtain and keep their original receipts for expenses under \$75 for six months after the trip. Business Managers have the discretion to require receipts for expenses under \$75 in situations they deem appropriate.

When a receipt does not have adequate information or is of poor quality, an additional proof of payment (such as a credit card statement or cancelled check) may be required to substantiate an expense. For details, refer to Procedure [3215 PR.01](#) *Yale Purchasing Card and Expense Management System*. Also refer to Guide [3301 GD.03](#) *Electronic Receipt Documentation*, and Guide [3401 GD.01](#) *Supporting Documentation Guidelines for business expenses*,

Travel Advances

The University issues travel advances if the traveler is ineligible for the Yale Purchasing Card or when extended travel or unusual circumstances are involved. For more information regarding extended travel, see Policy 3305 Long Term Activity and Other Expense Advances.

3301.7 Sales Tax

Certain lodging and meal expenses incurred while traveling on University business may be exempt from state sales tax provided:

- the state allows an exemption for meals and/or lodging expenses,
- the University holds a state sales tax exemption certificate in the state of travel, where required and
- the University makes payments directly to the hotel or restaurant using a Yale Purchasing Card or check.

The list of states in which the University currently qualifies for travel related sales tax exemption is provided in the [Controller's Office Fact Sheet](#).

3301.8 Business Travel Insurance

The University maintains a business travel insurance policy that provides coverage for accidental death or dismemberment and permanent total disability while an employee is traveling on University business. Coverage begins when employees leave their residence or place of employment for the purpose of commencing a business trip and ends when employees return to their residence or place of employment, whichever occurs first. Employees traveling in groups should be aware that the University is subject to a maximum insurance limitation per accident and should consult the [Office of Risk Management](#) for more information. Major insurance exclusions apply to certain leaves of absence, flying as a pilot, war, suicide, and flying in aircraft owned or leased by the University.

The University does not reimburse for the cost of life insurance purchased by travelers to provide additional protection for their families in the event of an accident.

Generally the University does not reimburse travelers for trip cancellation insurance; however, in special circumstances it may be reasonable based on the high cost of an airline ticket. Before purchasing such a high cost ticket, the traveler should determine if it makes more sense to purchase a refundable ticket. Proper documentation must be provided.

Emergency Travel Assistance Program

The University maintains an Emergency Travel Assistance program that provides medical, personal safety and travel-related assistance services if an emergency arises while traveling domestically or internationally. Domestic coverage is included for travel 100 miles or more from home while on University business, and coverage applies to all international travel for business or pleasure. For more information contact the [Office of Risk Management](#).

Coverage for Personal Effects

Loss of or damage to personal belongings of the traveler are not covered by the University insurance.

3301.9 Travel Expenses Funded by Grants and Contracts

Restrictions: In addition to meeting all other policy requirements, travel costs charged to grants and contracts are subject to specific limitations and restrictions, in accordance with terms set by the sponsor. Travel policies of federal and non-federal sponsors vary.

Travelers on University business trips that are funded directly or indirectly by a federal grant or contract must abide by the [A-21 rules](#) on air travel. Department business offices are strongly encouraged to contact the appropriate Office of Grants and Contracts to find out more about the requirements pertaining to your particular grant.

Fly America Act: Before making any arrangements for travel that will be funded by a grant or contract, departments should consult the terms and conditions of the specific award and the approved budget, and review the requirements of the Fly America Act.

For international air travel, Federal requirements state that American carriers must be used when a traveler is flying between the United States and another country or between other countries (the Fly America Act). This requirement shall not be influenced by factors of cost, convenience or personal travel. The few exceptions to this requirement are listed in Guide [3301GD.02](#). Please also refer to the Fly America Act Checklist and Waiver [Form 3301 FR.06](#) in order to determine if one qualifies for the waiver. A copy of the approved exception must be kept in the grant file.

Advance Approval Required: Grants from some federal agencies and most federal contracts require that all international travel, even if included in the award, be approved from 45 to 90 days in advance by the sponsor's administrative officer. Travelers should consult with the appropriate Office of Grant and Contract Administration for details on obtaining approval.

Penalties and Fees: In certain limited situations penalties or cancellation fees for airline, hotel and car rentals may be reimbursable under a federally-sponsored award.

Alcohol and Entertainment Expenses: Expenses for alcoholic beverages and entertainment expenses cannot be charged to a federal grant or contract and must be coded as an unallowable expense. Such expenses are only allowable on non-federal programs when the event has been specifically approved in advance by the sponsor. See Policy [3302 Business Meals, Entertainment, and Other Social Events](#), for further information.

Related Information

Guide [3301 GD.01](#) Miscellaneous Non-Reimbursable Travel Expenses

Guide [3301 GD.02](#) Use of U.S. Flag Carriers for Sponsored Foreign Travel

Guide [3301 GD.03](#) Electronic Receipt Documentation

Guide [3301 GD.04](#) Quick Reference

Guide [3401 GD.01](#) Supporting Documentation

Guide [1305 GD.03](#) Unallowable Cost Expenditure Type

Form [3401 FR.01](#) Employee Reimbursement form

Form [3301 FR.05](#) Missing Receipt form

Form [3301 FR.06](#) Fly America Act Checklist and Waiver Form

Procedure [3301 PR.01](#) Travel Arrangements for University Business

Procedure [3215 PR.01](#) Yale Purchasing Card and Expense Management System

Procedure [3401 PR.02](#) Check Request

Guide [1305 GD.07](#) Determining Reasonableness, Allocability and Allowability of Costs for Federally Sponsored Awards

Policy [1705](#) Automobile Fleet Safety Program

Policy [3302](#) Business Meals, Entertainment and Other Social Events

Policy [3210](#) Contracting for External Consultants and Other Professional Services

Policy [3305](#) Long Term Activity and Other Expense Advances

Policy [3415](#) Payments to Individuals Who Are Neither Citizens nor Permanent Residents of the U.S.

[Office of Grant and Contract Administration](#)

[Yale Travel Services](#) [Travel Warnings](#)

[Controller's Office Fact Sheet](#)

Federal government [domestic per diem](#) rates and [foreign per diem](#) rates

[Check Request for International Payees](#)

Contacts

Subject	Contact	Phone
Travel Services	Travel Coordinator	432-9011
Travel Services	Travel Director	432-8539
Expense Reports	Controller's Office	432-5524
Employee Reimbursement Check Requests	Accounts Payable	432-5394
Interpretation of policy	Controller's Office	432-5524
Insurance related to travel	Office of Risk Management	432-0140
Travel on Grants and Contracts	GCFA-- Central Campus / FAS GCFA-- YSM / Nursing	432-2460 785-4689
Tax Issues	Tax Office	432-5530

Roles and Responsibilities

Associate/Deputy Provost or Provost Designee

Review and rule on requests for exceptions to University travel policy with respect to faculty members, students, visiting scholars. These exceptions may include University payment of the expenses of travel companions, requests for first class and business class travel, the use of private aircraft, and per diem reimbursement for travel greater than 30 days.

Controller

Review and rule on requests for exceptions to University travel policy with respect to staff members and consultants. These exceptions may include University payment of the expenses of travel companions, requests for first class and business class travel, and the use of private aircraft. Advise the community on the interpretation of travel policies.

Yale Travel Services

Provide high quality service to travelers. Secure travel reservations for business travel with travel enabled Purchasing Cards for airline, hotel, car and Amtrak tickets. Assist with reservations for conferences and group travel for University travelers and visitors. Assist travelers in obtaining visas and information regarding passport.

Travel Director

Oversees the Yale Travel Services, which includes the **Orbitz For Business**. Provide best in class

online booking tool to procure travel. Promote and assist with interpretation of the travel policy and procedure. Negotiate discounts and other savings with preferred travel providers.

Travel Coordinator

Reports to the Director of Travel Services. Assists and oversees the implementation and maintenance of preferred travel vendors. Has responsibility for communications to the community, as well as outside vendors, and is involved in the day to day maintenance and functionality of third party systems.

Accounts Payable Department

Process travel reimbursements in a timely manner in accordance with the University policies and procedures. Advise the community on the interpretation of reimbursement procedures.

Office of Grant and Contract Administration

Advise departments and principal investigators as to the terms and conditions of specific awards as they pertain to travel, and provide general guidance with respect to travel funded by grants and contracts. Review and approve requests for waivers to Fly America Act.

Office of Grant and Contract Financial Administration

Review and approve all requests for reimbursement for international travel funded by Grants and Contacts that are not processed by EMS.

Department Administrator

Obtain required approvals prior to making travel arrangements. Ensure that travel advances and expense reimbursements are reasonable and necessary in accordance with University policies and procedures. Submit travel advance clearance and reimbursement within 10 days of return from contiguous travel.

Traveler

Obtain required approvals prior to making travel arrangements. Ensure that travel expenses are reasonable and necessary in accordance with University policies. Submit travel reimbursement requests and/or advance clearance within 10 days of return from travel. Submit all required receipts.

Revision History

Policy first issued on 11/00. Revised on 1/05. Last major revision on 11/05. Revised and posted on the Main site 9/07. Revised on 9/24/07. Revised again on 2/7/08. Minor revisions on 3/11/08. Revised on 4/17/08.

The official version of this information will only be maintained in an on-line web format. Any and all printed copies of this material are dated as of the print date. Please make certain to review the material on-line prior to placing reliance on a dated printed version.
