



# The University of Connecticut Travel and Entertainment Policies and Procedures



## **University of Connecticut**

Office of Travel Services,  
Accounts Payable Department  
New Central Warehouse Building,  
3 North Hillside Road, Unit 6220  
Storrs, CT 06269-6220

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## PURPOSE

The University of Connecticut (University), here defined as all 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 recruits and job candidates. It applies to individual, group, 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 goal of these policies is to generate cost savings for the University. If a traveler can document a cost saving measure, which would otherwise be violating these policies, the Office of Travel Services will review the expenditure and, most often, support and reimburse the cost saving measure.

In rare cases, exceptions to these policies may be warranted. The Provost, Executive Vice President for Administration and Chief Financial Officer, or the Athletic Director may review and grant exceptions. The Office of Travel Services will report all exceptions to the President's Office.

### 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 commute. 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. That is, employees must deduct the mileage of their normal commute when they claim mileage for travel to a business destination.

Employees will not receive reimbursement for theater tickets, guest meals, entertainment, and similar expenses if the expenses do not relate directly to University business.

Travelers will not be reimbursed for personal items, including newspapers, magazines, prescriptions, toiletries, laundry services, childcare costs, pet boarding fees, credit card interest or late fees, hotel and airline membership fees, 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. International medical insurance is provided by the University through HTH Worldwide for 185 days (6 months) . Travelers are responsible for securing international travel insurance after the 185<sup>th</sup> day.

In addition, travelers will not receive travel reimbursement for participation in events that are not related to their University work or activities. Moreover, travelers will not be eligible for reimbursement for University-related travel expenses if they are paid an honorarium, stipend, monetary fee or receive a gift in exchange for their participation in the event. The traveler may instead choose to waive any such honorarium, stipend or gift or have it paid directly to the University and then they would be eligible for travel reimbursement in accordance with the travel policy.

## **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 at the next highest organizational level. Therefore, travel and/or entertainment expenses must be approved by the person to whom the employee reports or their authorized delegate. Thus, 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 retain and submit original receipts. Specific requirements for airfare, rental car, meal, lodging, and entertainment reimbursement are provided in the applicable Policies and Procedures section.

### **Procedure**

To be reimbursed, travelers should complete a Travel Reimbursement Form and submit it and all required documentation to the Office of Travel Services within fifteen days of returning from a trip. Reimbursements submitted later than 60 days after travel is complete will not be paid without Department Head, Director, or Dean approval, as appropriate.

Travelers must document actual expenditures. To do so, travelers must attach all *original* vouchers and receipts for all expenditures, regardless of the dollar amount, to the Travel Reimbursement Form. Photocopies or facsimiles are not considered original receipts and travelers must substantiate photocopies by including an Exception to Policy Form, signed by the appropriate Dean, Vice President, or the Provost.

To avoid 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.

Appendix C includes relevant travel reporting and reimbursement forms.

For further information, The Provost's Office provides additional travel guidance at [http://web2.uconn.edu/provost/?page\\_id=2122](http://web2.uconn.edu/provost/?page_id=2122)

## PART 1: PLANNING AND APPROVAL

### 1a. AUTHORIZATION TO TRAVEL

Travelers must obtain approval to travel out-of-state or internationally prior to departure. Approval is required for all travel on official business, including travel that is at no cost to the University. Approval is not required for travel on personal business, such as travel related to approved consulting activities or while on vacation.

#### Procedure

To obtain approval to travel, a traveler must submit a Travel Approval Form. The Travel Approval Form may be completed online at <http://ta.uconn.edu>. Detailed instructions for the Travel Approval Form are available on the Travel website: [http://travel.uconn.edu/forms/Travel\\_Approval\\_System\\_Overview.pdf](http://travel.uconn.edu/forms/Travel_Approval_System_Overview.pdf)

The Travel Approval Form will be routed to the traveler's Department Head, Dean, Director (or their designee), as appropriate, for approval. In addition, for departments that report to the Provost, the Provost's Office must approve international travel (for insurance purposes) and expenses over \$10,000.

The traveler is required to provide an estimate of travel expenditures on the Travel Approval Form. Travelers should estimate their expenses to the best of their ability, as this eases the reimbursement process. Once travel is approved, the traveler will be reimbursed for actual expenses. If the actual expenses exceed the estimate by \$500 or more, the traveler must revise their original Travel Approval Form to reflect these expenses. The revised form will follow the same route as the original request.

Note that if a traveler seeks a travel advance the Travel Approval Form must be faxed to the Office of Travel Services **at least five days prior to the date of departure**.

The Travel Approval Form will not be processed if funds are not available in the account to be charged. In addition, travelers who plan to fund their travel through the Research Foundation, AAUP, or UCPEA must request this support *before* they complete the Travel Approval Form. Documentation of support must then be submitted with the Travel Reimbursement Form.

Finally, if a trip is cancelled, the Office of Travel Services must be notified as soon as possible by email, fax, or by sending a copy of the approved form marked "cancelled."

## **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 within the required time. Students may also obtain travel advances, but student advances are the responsibility of the sponsoring department; the department will be charged the amount of the advance if the advance exceeds the allowable reimbursement.

Travel advances are limited to 75% of estimated costs, excluding those costs that are eligible to be paid directly (such as air tickets or conference registration fees). Advances will not be issued more than 10 days prior to the departure date. Travelers are encouraged to enroll with Accounts Payable for direct deposit to their personal bank account for advances and reimbursements. This enrollment form can be downloaded from the following link: <http://ap.uconn.edu/achauthemp.html>

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.

If a traveler receives a travel advance, the traveler must file a request for reimbursement within 120 days or the advance will be considered taxable income (IRS Pub. 463). Also, in accordance with the signed travel advance agreement, the University has the authority to deduct the amount of the unpaid advance from a traveler's paycheck.

### **Procedure**

To request an advance, a traveler must indicate the desire for an advance on the Travel Approval Form, and they must sign and submit the Travel Advance Agreement (shown at Appendix B).

Once the traveler has signed the Travel Advance Agreement and it is on file in the Office of Travel Services, the traveler can pick up the travel advance at the Office of Travel Services within 10 days of the date of departure. Travel advances can also be deposited directly into an employee's bank account. Go to <http://ap.uconn.edu/achauthemp.html> to enroll in direct deposit for reimbursements.

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## **1c. USING STUDENT AWARDS FOR TRAVEL EXPENSES**

When a student receives an award that covers travel and miscellaneous expenses, the student may receive a reimbursement for legitimate travel expenses not to exceed the amount of the award.

### **Procedure**

To receive reimbursement, students should submit a Travel Reimbursement Form to Accounts Payable.

## **1d. OFFICIAL TRAVEL PARTIES**

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

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, but may travel on official business, if they receive prior written approval from the Provost, Athletic Director, or the President. 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 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.

### **Procedures**

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 Reimbursement Form. These expenses should not be included with the Official Travel Party’s expenses.

Non-university affiliated individuals must receive prior written approval from the Provost, Athletic Director, or the President. 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.



## **1e. SPOUSAL/PARTNER TRAVEL AND EVENT PARTICIPATION**

The travel expenses of a spouse or partner will fall within one of three classifications:

### 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 event 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

When an employee's University employment contract permits their spouse or partner to travel and receive travel reimbursement, this reimbursement, absent a bona fide business purpose, will be considered compensation to the employee. The reimbursement, absent a bona fide business purpose, will be included in the taxable wages of the University employee.

### Accompaniment with No Business Purpose

The travel expenses of a spouse or partner who has no official role for the University and is simply accompanying a University employee on a trip are the personal responsibility of the employee. Likewise, travel expenses for children are the personal responsibility of the employee. In the case of University chartered transportation, the appropriate Department Head, Director or Dean must approve the presence and participation of the spouse or partner, or any other family members, prior to travel.

## **Procedures**

The Office of the President will determine when a spouse or partner is a representative of the University with respect to essential fundraising or development services, and is therefore eligible for event and travel reimbursement.

For non-fundraising business, the payment or reimbursement of the travel expenses of a spouse or partner requires the prior written approval of the President or his/her designee. Prior to approval, the President or his/her designee will consider the essential or compelling business purpose requiring the participation of the spouse or partner, and a reasonable estimate of the costs or expenses for the spouse or partner.

## **1f. 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.

Employees must use their personal credit card when combining business and personal travel.

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.

### **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 Approval Form.

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, including cost comparisons from the date of booking, with the Travel Reimbursement Form. See Appendix E for examples of alternate site routing during business and personal travel.

## PART 2: AIR TRAVEL

### 2a. TRANSPORTATION TO AND FROM AN AIRPORT

Travelers should use the least expensive mode to travel to airports, which may include a personal vehicle, a rented vehicle, a taxi, or a shuttle service.

Expenses for private livery services will not be reimbursed. Private livery services are not eligible for direct vendor payment. If the use of private livery services instead of a personal vehicle, a rented vehicle, a taxi, or a shuttle service results in a net savings to the University, a traveler may be reimbursed for the expense provided documentation received at the time of booking justifies the cost savings.

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 their regular duty station, 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 Reimbursement Form. 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 commute.

## **2b. PARKING AT BRADLEY INTERNATIONAL AIRPORT**

Fourteen-day parking permits are available to travelers 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, their parking expenses will not be reimbursed.

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

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

Students are not eligible to receive parking permits for Bradley International Airport. Students should park at the lowest-cost economy parking lot available; and may be reimbursed for these expenses.

Employees or students who park in Short-Term Parking across from the airport terminals in order to pick up arriving passengers may have these expenses reimbursed.

### **Procedure**

#### Prior to Travel:

It is the responsibility of the traveler to ensure that they have the permit in their possession prior to departure. To obtain a parking permit, employee must indicate this request on the Travel Approval Form (TA). After the TA is finalized, 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 will have their Parking Permits available for pick up at the front desk of the Office of Travel Services. It is the traveler's responsibility to obtain the parking pass before departure. Travelers may contact the Office of Travel Services to inquire about the status of their permit.

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 designed 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, the traveler must submit the paid receipt and the original parking permit with a brief explanation in the "Remarks" section of the Travel Reimbursement Form.

To receive reimbursement if the business travel extends beyond fourteen days, the traveler must submit the paid receipt.

Students or those picking up arriving passengers should submit paid parking receipts for reimbursement.

## 2c. COMMERCIAL AIR TRAVEL

Employees should purchase the lowest reasonable commercial fare available. The definition of the “lowest reasonable commercial fare” is the least costly, coach-class fare that uses a regularly scheduled commercial carrier. In selecting a commercial fare, travelers should not consider their preferences for airline, type of aircraft or connecting airports but instead should choose the lowest reasonable commercial fare. Likewise, travelers may not insist on non-stop flights; a trip may require one plane transfer both departing and returning. An employee’s flight should depart from the airport nearest to the employee’s official duty station or home, but an employee may use a different airport if that airport is documented to be more cost effective for the University once additional expenses for parking, mileage, and resulting overnight stays are included. Travelers should purchase non-refundable tickets, unless a refundable ticket is documented to be cheaper.

First class air travel rates will not be reimbursed. A traveler may be reimbursed for business class rates when the travel includes transoceanic, intercontinental flights longer than eight hours in duration per flight segment (excluding the U.S. segment).

Special travel arrangements that result in net savings to the University are permissible. That is, a traveler may be reimbursed for expenses such as extra days of lodging, meals, and other additional costs, if the traveler can demonstrate that the total cost of the trip is lower than it would otherwise have been.

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 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.state.gov/e/eeb/tra/ata/>

### Procedure

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

- Contracted (Preferred Method)

Travelers may make travel reservations and ticket purchases with one of the University-contracted agencies travel (listed at Appendix A). Upon purchasing, the traveler should provide the agency with the Travel Approval Form (TA) number, their employee number, and the department’s Kuali Financial System (KFS) account number. The contracted travel agencies will bill the University for all air services.

- Non-Contracted

Travelers may make travel arrangements through an agency or airline of his/her choice and pay the agency or airline directly. Traveler will not be reimbursed for travel agency booking fees in excess of those charged by the University-contracted agencies.

Travelers using a federal grant to fund their travel must use a U.S. flagship carrier between the United States and a foreign country or between foreign countries, and shall not be influenced by factors of cost, convenience, or personal travel preferences.

Within fifteen days of returning, travelers should submit a Travel Reimbursement Form with all applicable original receipts. Reimbursement requests must include the original air ticket itinerary and receipt, and a boarding pass, if provided by the airline. In the absence of a boarding pass, further documentation is required to demonstrate that

the travel took place. Acceptable documentation includes an original hotel receipt, an original restaurant receipt, or original receipts for other business expenses, demonstrating that the Traveler reached their destination.

If a traveler requests reimbursement for business class rates for an international flight, the traveler must provide a travel itinerary demonstrating that the non-U.S. segment of the flight was more than eight hours in duration with their Travel Reimbursement Form.

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 Travel Reimbursement Form and attaching supporting documentation of their calculations (e.g. copies of airfare quotations from the travel agency when the travel was booked).

## **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 written justification for the excess baggage, and receives written approval by the appropriate Department Head, Director, or Dean.

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.

### **Procedures**

Travelers should attach original receipts for all baggage fees, specifically detailing the traveler's name and proof of payment, to the Travel Reimbursement Form.

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## **2e. UNUSED TICKETS**

The University will not reimburse a traveler for an unused ticket purchased by the traveler using their personal funds.

### **Procedures**

If the traveler purchased a ticket using a University-contracted travel agency, 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 the traveler's next trip. 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.

## **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.

### **Procedures**

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/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 Procurement Office 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 far 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 the appropriate 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

The traveler must document the cost comparisons of ground travel vs. air travel using itineraries from Sanditz or Orbitz dated at the time of booking, and include the documentation with the Travel Reimbursement Form.

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### 3b. RAIL TRAVEL

Travelers will receive reimbursement for tickets purchased for rail journeys of less than four hours with standard accommodations. Rail journeys longer than four hours are eligible for a business class (Acela) upgrade and the traveler will receive reimbursement. Travelers will not receive reimbursement for first class travel rates.

#### Procedures

Rail tickets may be booked through two of the University contracted travel agencies, Worldtek and Sanditz. The University will pay the agency directly. Ticket delivery fees will not be reimbursed if online tickets or pick-up is available.

Travelers should attach all original and applicable receipts, tickets and itineraries to the Travel Reimbursement Form.

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### 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://tlp.uconn.edu/motorpool.html>. 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.

Mileage Rate: [http://travel.uconn.edu/mileage\\_perdiem.php](http://travel.uconn.edu/mileage_perdiem.php)

Travelers will not receive reimbursement for travel from their home to their official duty station unless provided under the applicable collective bargaining agreement.

In addition, travelers will not receive travel reimbursement for participation in events that are not related to their University work or activities. Moreover, travelers will not be eligible for reimbursement for University-related travel expenses if they are paid an honorarium, stipend, monetary fee or receive a gift in exchange for their participation in the event. The traveler may instead choose to waive any such honorarium, stipend or gift or have it paid directly to the University and then they would be eligible for travel reimbursement in accordance with the travel policy.

It is the responsibility of the traveler to maintain automobile insurance in the amount of \$50,000/\$100,000, if using their personal vehicle for business purposes.

Unless permitted by collective bargaining agreements, 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 for which they seek reimbursement 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 when it is the most cost-effective mode of travel for University business.

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 prior written approval from the appropriate Department Head, Director, or Dean: Premium, Luxury, Small Sport Utility, or Large Sport Utility.

University-contracted rental rates include the following insurances: Collision, third-party-liability, and property-damage-liability insurances. The University will not pay for or reimburse the traveler for any additional insurance.

Travelers are responsible for returning the vehicle with a full tank of fuel to avoid surcharges. Travelers may not choose the fuel service option, whereby a renter pays an extra fee instead of re-fueling the car.

The University will not pay for penalties, fines, fees, fuel service, fuel surcharges, or extra cost options.

#### **Procedures**

Travelers who rent a vehicle for University business should use the University-contracted agency, unless it is less expensive at a competitor. The traveler must justify the selection of another rental car provider by providing documentation of the total cost at the time of rental, including insurance, on the Travel Reimbursement Form. Travelers will pay for rental vehicles with their personal credit cards. Travelers will be required to present their credit card and license when they pick up the car.

To rent a vehicle, travelers should follow the following steps:

1. Go to <https://web2.uconn.edu/travel/hidden/agencies.php> and click on the "Enterprise" weblink.
2. Enter the Pick Up Location; Pick Up Date and Time; Return Date and Time; Vehicle Class; Renter's Age.
3. Enter UCO as the first three characters in the box provided in the Corporate Account Sign-In, and click "sign-in."
4. Review and edit the details of the transaction, if necessary, and then select and continue.
5. Complete the Renter's Details, continue, and provide an email address for an email confirmation. (Note that this screen asks for credit card type but not a credit card number. Enterprise does not require a credit card number to make a corporate account reservation.)
6. Verify the information, and, if correct, click "book now."
7. Retain the confirmation number.

Travelers must submit the car rental agreement indicating the class of vehicle selected, and gasoline receipts, with their Travel Reimbursement Form. The receipt must show payment, including the rental agreement number, mileage in, and mileage out. Credit card receipts 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 twenty-five 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 twenty-five percent (excluding taxes) provided the conference rate was obtained when registering.

#### Procedure

Travelers must justify lodging expenses that exceed the federal per diem lodging rate by more than twenty-five percent on the Travel Reimbursement Form and obtain approval from their Department Head, Director, or Dean. Travelers are encouraged to ask providers of lodging for discounts provided to governmental employees, such as the State of Connecticut.

Federal per diem lodging rates are available at [http://travel.uconn.edu/mileage\\_perdiem.php](http://travel.uconn.edu/mileage_perdiem.php)

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### 4b. IN-STATE LODGING

Subject to prior approval from the appropriate Department Head, Director, or Dean, a traveler 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 station. However, if the traveler's destination is less than 75 miles from their personal residence, the traveler may not request reimbursement for lodging even if the mileage from the traveler's official duty station is 75 miles.

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

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### 4c. USE OF NATHAN HALE INN

In rare circumstances, a University employee may require lodging at the Nathan Hale Inn in order to carry out their 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.

The cost of the hotel stay will be considered taxable income on the employee's W-2 unless the hotel stay is deemed to be for the benefit of the University and supported by documentation to this effect.

#### Procedure

In these special cases, the employee must pay for the hotel stay themselves, and then request reimbursement, with the appropriate approval as noted above. It is not permissible for University employees who stay at the Nathan Hale Inn to charge this expense directly to a University KFS account.

#### **4d. GROUP LODGING**

Travelers, Departments, or Divisions that need to contract for group lodging must solicit bids from a minimum of three properties in the travel destination.

##### **Procedure**

Travelers should secure written quotes directly from the hotels or from a lodging procurement agency. 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 send the justification and relevant documentation with the contract to the University Procurement Office, who will issue a purchase order.

## 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.

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

Travelers must use one method of reimbursement for the entire trip. **Reimbursement for actual meal costs may not exceed the allowable daily per diem rate.**

#### Procedures

##### Reimbursement for actual costs (with receipts):

Travelers must submit original receipts for actual meal expenses with their Travel Reimbursement Form. Original receipts must include proof of payment and an itemized receipt detailing the charges. The total reimbursement request for eligible meals for a given day must not exceed the maximum allowable according to the per diem table on the Travel website: [http://travel.uconn.edu/mileage\\_perdiem.php](http://travel.uconn.edu/mileage_perdiem.php)

Travelers must indicate departure and return times on the Travel Reimbursement Form. 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 may receive per diem meal reimbursements, including tax and tips, at the appropriate rates as per the tables on the Travel website: [http://travel.uconn.edu/mileage\\_perdiem.php](http://travel.uconn.edu/mileage_perdiem.php) 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 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. Travelers claiming per diem reimbursement do not need to provide receipts for their meals.

## 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 vary from the reimbursement regulations contained herein. **For such cases, collective bargaining contracts take precedence.** Also, this policy does not apply to classified employees traveling on funds provided by their collective bargaining unit. 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 as follows:

	AFSCME SOCIAL P-2	PROTECTIVE SERVICES NP-5	AFSCME CLERICAL NP-3	MAINT. SERVICE NP-2
Breakfast	\$7.50	\$6.00	\$6.00	\$5.00
Lunch	\$9.00	\$8.00	\$8.00	\$7.00
Dinner	\$20.00	\$18.00	\$18.00	\$16.00
Miscellaneous		\$5.00		\$4.00
Tips	15.00%	15.00%	15.00%	15.00%
Mileage Reimbursement	\$0.555 GSA	\$0.555 GSA	\$0.555 GSA per mile, \$2/day min.	\$0.555 GSA
Personal Auto Use	\$4.50/day is used 50%			
Tolls/Parking	Actual	Actual	Actual	Actual
Undocumented Costs - Out of State/Overnight	\$5.00 If two (2) consecutive full work days	\$5.00 If two (2) consecutive full work days	\$5.00 If two (2) consecutive full work days	\$5.00 If two (2) consecutive full work days
Workshops & Conferences	\$500.00/year or \$1000 for 1 event in 2 years	No limit specified; union approval needed	\$400.00 per event, 2 events per year	\$1000.00 per event; 2 events per year

Travelers in the following categories may claim reimbursement for the actual cost of their meals (substantiated with original receipts) or they may claim reimbursement per diem. Travelers must use one method of reimbursement for the entire trip.

### Procedures

#### Reimbursement for actual costs (with receipts):

Travelers must submit original receipts for actual meal expenses with their Travel Reimbursement Form. The total reimbursement request for eligible meals for a given day must not exceed the maximum allowable according to the Union contract.

#### 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.travel.uconn.edu/>. 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 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.

### **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 their home and official duty station for more than ten hours and the reimbursement requests are occasional and non-routine. Travelers must receive prior Department Head, Director, or Dean approval.

In this situation, employees are entitled to reimbursement for lunch. In addition, employees who depart their home or official duty station prior to 7:00 a.m. are entitled to reimbursement for breakfast. Employees who return to the home or official duty station after 7:00 p.m. are entitled to reimbursement for dinner.

Receipts are not required; travelers must note times of departure and return on the Travel Reimbursement Form 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. (See Appendix F for an example.)

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### **5d. BUSINESS MEALS (WHILE TRAVELING)**

In general, travelers may be reimbursed for meal expenses from the time they leave their home or official duty station until the time they return to their home, official duty station, or other official State location at the conclusion of the trip. Travelers may not be reimbursed for meals when they are provided as part of the hotel or conference fee, whether or not the traveler chooses to eat the meal provided.

A traveler may be reimbursed for a business meal conducted while traveling, including expenses for guest meals if those guests are essential to the business purpose of the meeting. Under no circumstances will reimbursement for each guest exceed two times the appropriate GSA Per Diem meal amount for location including taxes and tip. In addition, only the cost of food and non-alcoholic beverages are reimbursable; the University does not pay for alcoholic beverages.

#### **Procedures**

Departments with University of Connecticut Foundation, Inc. (Foundation) funds are encouraged to use these funds as the primary reimbursement method to cover the expense of business meals.

If requesting reimbursement from the University, employees may request reimbursement for business meals by attaching the Business Meal Detail Form (Appendix C) with the original itemized receipt and proof of payment to the Travel Reimbursement Form. The Business Meal Detail Form must include the date, location, business purpose, attendees, company or organization represented, and their affiliation to the University, if any, and the actual cost of the meal per person. Without proper justification and prior approval on the Business Meal Detail Form and Travel Reimbursement Form, the University will not reimburse expenses for spouses or non-essential guests of the traveler.

Travelers should deduct the cost of the business meal from their daily per diem based on the type of meal eaten (Breakfast, Lunch, or Dinner).

GSA Per Diem tables are available at the following: [http://travel.uconn.edu/mileage\\_perdiem.php](http://travel.uconn.edu/mileage_perdiem.php)



## 5e. CONFERENCE AND OTHER MEALS PROVIDED

Conferences frequently provide meals to attendees as part of the registration fee. The traveler is 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.

### Procedures

To assist with the determination of which meals were provided during a conference, a copy of the agenda (meeting schedule) or conference registration receipt must be included with the travel reimbursement request. The Travel Reimbursement Form must also include the actual time of departure from the traveler's home or place of business for the trip and time the traveler arrived home (or ended their University business if using personal time while on their trip).

If certain circumstances, such as unique dietary needs, make it necessary for the traveler to forego the provided meal, after such accommodation has been actively requested of the conference arranger by the traveler, the traveler may then claim up to the maximum meal allowance. **In such cases, a receipt(s) for the meal and a written explanation are required.**

## **5f. BUSINESS MEALS (WHILE NOT TRAVELING)**

Note that the provisions in this section do not supersede meal reimbursements as stipulated by Collective Bargaining agreements.

In general, employees are responsible for paying for their own meals when they are not traveling. That said, meals associated with business meetings or for business purposes may be reimbursed. Examples of circumstances under which reimbursement is justified include meals during conferences, workshops, or interviews of job candidates, and meals with visiting lecturers, donors, or other official guests. 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. To justify a group meal, business meetings must last for a minimum of two hours. If the meeting can be accomplished effectively without a meal, then it should be.

Group business meals are usually purchased through dining services (including Chuck and Augies), outside vendors, or the Nathan Hale Inn. They require the prior written approval of the Department Head, Director or Dean. The approval request should include the purpose of the meeting or event; a formal written agenda including session times; a list of attendees with their associated departments/entities; and the expected cost of the meal per person. Set-up and delivery costs associated with the group meal shall not be included in the meal limit calculation.

For all business meals, including group meals, organizers should limit attendance to essential guests only. Without proper justification on the Business Meal Detail Form, the University will not reimburse expenses for spouses or partners or non-essential guests. Under no circumstances will reimbursement for each guest (including taxes and tip) exceed two times the appropriate GSA Per Diem meal amount for the location. The University will reimburse expenses for food and non-alcoholic beverages only; the University does not pay for alcoholic beverages.

### **Procedures**

Departments with Foundation funds are encouraged to use 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 (Appendix C) with the original itemized receipt and proof of payment to the Reimbursement Request. The Business Meal Detail Form (Appendix C) must 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, a Meal Charge Ticket allows departments to charge the meal to a KFS account. The Meal Charge Tickets are available at the Nathan Hale Inn and Conference Center. All Meal Charge Tickets require pre-approval by the appropriate Department Head, Director or Dean. (See Appendix G for sample of the Meal Charge Ticket.)

Organizers of group meals must obtain prior written approval for the meal from the Department Head, Director, or Dean. The approval request should include a Business Meal Detail Form, including the purpose of the meeting or event; a formal written agenda including session times; a list of attendees with their associated departments/entities; and the expected cost of the meal per person. The organizer should submit the Business Meal Detail Form and the signed approval with the payment request. Accounts Payable will retain these materials for audit purposes.

Finally, for reference, the GSA Per Diem tables are available at: [http://travel.uconn.edu/mileage\\_perdiem.php](http://travel.uconn.edu/mileage_perdiem.php)

Units that want to contract for catering services for a group meal that will cost more than \$2000 should refer to guidance from UConn Purchasing at:

<http://www.purchasing.uconn.edu/usersmanual/sectiontwo/sectiontwo.html#Catering>

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## **5g. GRATUITIES FOR MEALS**

Gratuities for meals while traveling and business meals, including hosted receptions and intercollegiate athletic team meals, are reimbursable at a rate not to exceed 20% of the pre-tax meal cost. When a vendor stipulates a gratuity and reflects it in the bill as a service charge, any additional gratuity is not reimbursable. The employee is 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.

## 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 Section 5e for further details on meals provided with conference registration.

#### Procedure

Travelers may use the following methods to pay registration fees:

- 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/>). A copy of the procurement receipt must then be attached to the Travel Reimbursement Form.

- Personal Payments for Registration Fees

Travelers who pay registration fees themselves must attach all receipts and appropriate documentation to the Travel Reimbursement Form.

- Office of Travel Services Checks

If no other options are available, the Office of Travel Services can process a check to prepay registration fees.

Regardless of how registration fees are paid, travelers must attach applicable receipts and conference agendas to the Travel Reimbursement Form 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.

## **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 will 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.

### **Procedure**

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

For telephone calls, travelers should document the destination and rate for all calls, and submit this with the Travel Reimbursement Form. If a traveler with a University cell phone or stipend seeks reimbursement for telephone charges, he or she must justify the need for the calls on the Travel Reimbursement Form.

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## **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**





To receive reimbursement, travelers should convert all foreign currency receipts to U.S. dollars using the exchange rate for the date marked on their receipts.

The Office of Travel Services provides foreign per diem rates on its website: <http://travel.uconn.edu/foreign.php>

## APPENDICES

### APPENDIX A: Contracted Travel Agencies

There are three contracted agencies available for booking University travel: Orbitz, Sanditz and Worldtek. Enterprise should be used for booking rental cars.

	
<p>Web Login: <a href="http://www.orbitzforbusiness.net">www.orbitzforbusiness.net</a>          Phone: 1-800-320-2158          Note: Access to use Orbitz for Business must be granted by the Travel Department. Please email your request for access to <b>Danielle Sullivan</b> or <b>Martin Dzenis</b></p>	<p>Primary Phone (Simsbury Office): 1-860-658-1901          Secondary Phone: 1-800-878-1905</p>
<p>Agency Fees:          \$8 online self-booked          \$24 over the phone with travel agent assistance.</p>	<p>Agency Fees:          \$31 over the phone with travel agent assistance</p>
	
<p>Corporate Phone: 1-800-257-8343          Athletics: 1-800-243-1800</p>	<p>Web Login: <b>Enterprise Web Portal</b>          Note: A personal credit card must be used when booking. This link is only to be used for authorized University business purposes.</p>
<p>Agency Fees:          \$25 over the phone with travel agent assistance.          \$20 for team travel with travel agent assistance.</p>	<p>Agency Fees:          No agency fee applies</p>

Note: These agencies offer 24/7/365 day assistance using the following information:

WorldTek – 1-800-257-8343

Orbitz - 1-877-672-4891

Sanditz - 1-800-936-2217 – Access code = \*\*S-C593-UCONN or call collect @ 682-223-1914

## APPENDIX B: Cash Advance/Travel Advance Agreement

Name: \_\_\_\_\_

Check Amount: \_\_\_\_\_

I promise to pay to the University of Connecticut the amount of the above referenced advance, less the appropriate deduction for approved expenses incurred within University policy, without interest, within 15 business days of my return from the trip.

I agree that these are State of Connecticut funds, and I understand that I am personally responsible for them whether or not my employment continues with the State of Connecticut, and whether the funds are lost or stolen. I agree to notify both the University of Connecticut Police and University of Connecticut Office of Travel Services **immediately** should a loss, theft, or mysterious disappearance of funds occur.

I will submit the required documentation for reimbursement, **including supporting receipts**, to the Office of Travel Services **within fifteen (15) business days after return**; and if the cash advance/travel advance was more than the expenditure, I will return the excess funds along with the completed documentation. I understand that if I do not adhere to these time frames for paperwork completion or repayment, I may be denied future advances, **or the repayment of my cash advance/travel advance may be deducted from my paycheck**. Additionally, any personal failure to file the required documentation or repay excess funds by the due date will subject me to reasonable costs of collection including but not limited to attorney fees and court costs if required to enforce this agreement.

If the cash advance/travel advance was **LESS THAN** the total approved expenditure, the travel advance receivables account will be credited appropriately by the Office of Travel Services and a check will be provided to me for the reimbursement due.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## APPENDIX C: Travel Forms

1. Travel Reimbursement Form – <http://www.travel.uconn.edu/procedures.php>
2. Business Meal Detail Form - <http://www.travel.uconn.edu/procedures.php>
3. Mileage Worksheet Form - <http://www.travel.uconn.edu/procedures.php>



## APPENDIX D: Accurate Reimbursement Examples

### To provide accurate reimbursement:

1. An official duty station must be declared
2. Examples (assume duty station is Storrs and home is in Torrington):

#### 1.) Traveling from home to work to an off campus meeting and then directly home.

Torrington to Storrs	59 miles
Storrs to Waterbury	56 miles
Waterbury to Torrington	25 miles
<b>Total</b>	140 miles
Less ROUND TRIP Home to Duty Station	(118) miles
<b>Reimbursed</b>	22 miles

#### 2.) Traveling from home to an off campus meeting and then directly back home.

Torrington to Waterbury	21 miles
Waterbury to Torrington	21 miles
<b>Total</b>	42 miles
Less ROUND TRIP Home to Duty Station	(118) miles
<b>Reimbursed</b>	0 miles

#### 3.) Traveling from home to an off campus meeting, then to another off campus meeting, then back to work and then to home.

Torrington to Waterbury	≡	21 miles
Waterbury to Stamford	≡	53 miles
Stamford to Storrs	≡	103 miles
Storrs to Torrington	≡	59 miles
<b>Total</b>	≡	236 miles
Less ROUND TRIP Home to Duty Station	≡	(118) miles
<b>Reimbursed</b>	≡	118 miles

#### 4.) Traveling from home to work then to an off campus meeting then back to work and then from work to home.

Torrington to Storrs	≡	59 miles
Storrs to Stamford	≡	103 miles
Stamford to Storrs	≡	103 miles
Storrs to Torrington	≡	59 miles
<b>Total</b>	≡	324 miles
Less ROUND TRIP Home to Duty Station	≡	(118) miles
<b>Reimbursed</b>	≡	206 miles

5.) Traveling from home to work then to Bradley airport. Return from trip and travel from Bradley to work and then from work to home.

Torrington to Storrs	=	59 miles
Storrs to Bradley	≡	37 miles
Bradley to Storrs	≡	37 miles
Storrs to Torrington	=	59 miles
<b>Total</b>	≡	192 miles
Less ROUND TRIP Home to Duty Station	=	(118) miles
<b>Reimbursed</b>	=	74 miles

6.) Traveling from home to Bradley Airport. Return from trip and travel directly to home.

Torrington to Bradley	=	35 miles
Bradley to Torrington	=	35 miles
<b>Total</b>	=	70 miles
Less ROUND TRIP Home to Duty Station	=	(118) miles
<b>Reimbursed</b>	=	0 miles

## APPENDIX E: Routing of Travel Examples

### Combining Business and Personal Travel

#### Example #1

Business related cost – Option #1

Bradley → Orlando – round trip = \$300.00  
Total: \$300.00

Personal cost – Option #2:

Bradley → Orlando – (1) way = \$125.00  
Orlando → Atlanta – (1) way = 90.00  
Atlanta → Bradley – (1) way = 220.00  
Total: \$435.00

**The University would only pay \$300.00.**

#### Example #2

Business related cost – option #1:

Bradley to LAX – round trip = \$385.00 (return on Thursday)  
Total: \$385.00

Personal related costs - option:

Scenario: Fly to Los Angeles for Business. Drive at your own cost to San Diego for a few days and fly back to Bradley from San Diego.

Bradley to LAX – (1) way = \$185.00  
San Diego to Bradley – (1) way = \$177.00 (return on Saturday)  
Total: \$362.00

**Due to less cost with Option 2, the University would pay \$362.00.**

## APPENDIX F: Meal Deduction Examples

Meal & Incidental Expenses Total	\$46	\$51	\$56	\$61	\$66	\$71
Continental Breakfast/ Breakfast	\$7	\$8	\$9	\$10	\$11	\$12
Lunch	\$11	\$12	\$13	\$15	\$16	\$18
Dinner	\$23	\$26	\$29	\$31	\$34	\$36
Incidentals	\$5	\$5	\$5	\$5	\$5	\$5

### 1.) Meal expenses not associated with overnight stay:

(Based on 75% of Storrs GSA in red above rates)

- |   |                         |
|---|-------------------------|
| 1. If criteria is met for lunch (>10 hours)                 | \$8.25 for lunch        |
| 2. If criteria is met for breakfast (depart before 7:00am)  | 5.25 for breakfast      |
| 3. If criteria is met for dinner (arrive back after 7:00pm) | <u>17.25 for dinner</u> |
| <b>Total allowed if all criteria met</b>                    | <b><u>\$30.75</u></b>   |

### 2.) Deduction of Meal provided by 3<sup>rd</sup> Party:

(Based on Storrs GSA rates in red above)

Breakfast is included with lodging charge paid to the hotel:

Daily Per diem amount	\$46.00
Deduct breakfast provided	<u>(7.00)</u>
<b>Amount to claim</b>	<b><u>\$39.00</u></b>

# APPENDIX G: Sample Nathan Hale Inn Meal Charge Ticket



## MEAL CHARGE TICKET

Please complete all areas below or ticket will not be accepted. All information is mandatory.  
*(Please Print Legibly)*

Date: \_\_\_\_\_

Dept. Name: \_\_\_\_\_

FRS#: \_\_\_\_\_

FRS Sub Code: \_\_\_\_\_ UBox: \_\_\_\_\_

Guests/Affiliation \_\_\_\_\_

Guests include UConn Employees?  Yes  No

Host Name: \_\_\_\_\_

Purpose of Meeting: (All meals paid for by university funds in accordance with the university's meal policy must be related to university business.)\*

Authorized Dept. Signature \_\_\_\_\_ Date \_\_\_\_\_

Please Print Name \_\_\_\_\_

Authorized Dept. Phone # \_\_\_\_\_

Breakfast  Lunch  Dinner

Location: \_\_\_\_\_ Limit: \_\_\_\_\_

Amount: \_\_\_\_\_ Gratuity \_\_\_\_\_

Total: \_\_\_\_\_

*(Please see reverse side)*

\* [http://web2.uconn.edu/acctpay/pp\\_meals.html](http://web2.uconn.edu/acctpay/pp_meals.html)

Please Note:

Requests for additional tickets may be directed to the Nathan Hale Inn

860-427-7888

[www.NathanHaleInn.com](http://www.NathanHaleInn.com)