



CHIP POLICY AND PROCEDURES MEMO NO. CH-08-03 FINANCE – CHIP Travel Procedures

Date: March 25, 2008
To: CHIP PIs and Staff
From: CHIP Business Unit Leader
Subject: FINANCE — CHIP Travel Procedures

These procedures are in effect until superseded.

CHIP Business Unit Staff Responsible for Travel

- Sarah Bothell (primary)
- Melissa Stone (secondary)

*** NOTE:**

- See your home department, if you wish to travel using an indirect account.

Purpose

- To establish procedures for travel requests and reimbursements through the CHIP Business Office.
- To ensure that employees and other persons are reimbursed accurately, efficiently, and in a timely manner.
- To ensure that all travel costs are accounted for accurately.

Procedures

- The CHIP Business Office will reimburse employees and other persons for eligible costs incurred during properly authorized and documented business travel.
- All travel requests and reimbursements must comply with applicable Federal laws and regulations, University regulations, and grant-related restrictions (if any).
- In order to use funds from a grant for travel, there must be funds allocated for travel in that grant. During budget projection meetings with the grants manager, determine if funds for travel are allowable and available. If they are allowable but not currently available, process a rebudget request so that they are available when you do make a travel request in the future.
- **Travel Request Form:**
 - Prior to traveling, please fill out the *Travel Request Form* (found at <http://www.chip.uconn.edu/TRAVEL%20REQUEST%20FORM.xls>), and e-mail it to

Sarah Bothell @ sarah.bothell@uconn.edu AND Melissa Stone @ melissa.stone@uconn.edu, or put it in the INBOX in Room 51. If you are not the PI of the grant that is funding the travel, e-mail the request to the PI as well. Submit your travel request as far in advance as possible to ensure the availability of flights, meeting of registration deadlines, the most cost efficient travel, etc. On the form you will need to provide the following information:

- Dates of travel (distinguish between official and personal travel, if applicable).
 - Purpose of travel.
 - Methods of transportation (air, bus, taxi, rental car, etc.).
 - Flight itinerary.
 - Hotel itinerary.
 - Registration fees.
 - Account/FRS to be charged.
 - Per diem and mileage.
 - Total travel cost estimate.
- The *Travel Request Form* will be processed within 3 business days after being received.
- **Flight Reservations:**
 - Make sure that your flight reservations are made as early as possible.
 - UConn prefers that you book your flight through the UConn contracted air agencies (Orbitz, Worldtek, or Southwest). Tell the CHIP travel staff (Sarah Bothell and Melissa Stone) which flights you would like to take, and they can book them for you. Prices of tickets purchased through these venues may be slightly higher due to mandatory fees. The advantage of this option is that the tickets can be immediately charged to the appropriate grant or other account, and you do not have to incur any out-of-pocket expenses for them.
 - If necessary, you may book your own flight, but if you do, you cannot be reimbursed until you return from your trip. Remember to keep your boarding passes and your receipt (which must show that YOU paid for the flight).
 - All air travel will be reimbursed at no more than the published coach rates for domestic flights. Business class will be reimbursed for international flights.
First class air travel rates will not be paid.
 - Adhere to the *Fly America Act*.
 - If you are paying for your flight with federal funds, you **MUST** fly on a U.S. air carrier, if one is available (as mandated by the *Fly America Act*). If, instead, you are using indirect funds, you do not have to fly on a U.S. air carrier.
 - For a list of U.S. air carriers, please see http://www.travel.uconn.edu/fly_america_act_airlines.html

- For more information on the *Fly America Act* (including exceptions), please see http://www.fic.nih.gov/funding/grants_info/travel.htm.
 - If you think that you qualify for an exception, please use the checklist found at http://www.travel.uconn.edu/flyamerica_act_checklist.pdf. *****COST IS NOT AN EXCEPTION.*****
- Get a parking permit if parking at Bradley International Airport.
 - If you will be parking a vehicle at Bradley International Airport while traveling, you must obtain a parking permit in advance and park in the State-approved lot (Lot 5B, or Lot 5A if 5B is filled). The CHIP travel staff will assist you in getting the permit. The parking permit will be prepared in the Travel Office and will be available for pick-up or mail as necessary. It is your responsibility to ensure that you have the permit in your possession prior to departure.
 - The parking permit allows you to park at Bradley for 2 weeks. If your trip is longer than 2 weeks, you will need to pay an extra parking fee, but that can be reimbursed. You still need to get a parking permit, and you still need to park in the State-approved lot!
 - Parking without the permit and parking in a lot other than the State-approved lot are not reimbursable.
- **Event Registration:**
 - If you are traveling to an event with a registration fee (e.g., conference), please send the registration information to Sarah Bothell and Melissa Stone ahead of time. They can register you for the event and pay for it with the CHIP credit card. (The registration fee will later be charged to the appropriate account).
 - Alternatively, you can register and pay for the event yourself and then get reimbursed for the expense after you have attended the event. In this case, it is critical to keep your receipt (which must show that YOU paid for the registration).
- **Travel Advance:**
 - If the estimated cost of a trip is more than \$350.00 (not including airfare and registration), you can request a travel advance to help cover the costs. The advance will be 75% of the estimated cost. Indicate on the *Travel Request Form* if you would like a travel advance. The UConn Travel Office needs AT LEAST 10 business days prior to the departure date to process a travel advance.
 - Advances will not be given when an employee has had an outstanding advance, which has been due for more than 30 days. The request for an advance will be held until such time as the outstanding balance has been paid or a reimbursement request has been filed with the Travel Office.

- **Meals:**

- You can be reimbursed for meals by either (1) per diem OR (2) actual receipts. You cannot mix the forms of reimbursement for a particular trip. In other words, you cannot claim per diem on the first day of your trip, claim actual receipts the second day, claim per diem the third day, etc. You must choose one method per trip.
- Per diem is a flat daily rate for meal expenses. If you use per diem, you do not have to keep meal receipts. Per diem is based on your destination. To look up U.S. and foreign per diem rates, please see <http://www.travel.uconn.edu/perdiem.html>.
 - If you only travel for partial days, you get partial diem. For example, if you leave at 8:00 AM and return at 5:00 PM, you can claim ½ day per diem. Please see the chart for additional information:

| Per diem rates by time | | |
|------------------------|---------|---------|
| 1:01 AM to | 7:00 AM | 1/4 day |
| 7:01 AM to | 1:00 PM | 1/4 day |
| 1:01 PM to | 7:00 PM | 1/4 day |
| 7:01 PM to | 1:00 AM | 1/4 day |

- If you have some of your meals paid for by someone else, subtract ¼ day per diem for each paid meal. For example, if you go to a conference, and your lunch and dinner are paid for by the conference, subtract ¼ day for lunch and ¼ day for dinner; you would only get ½ day per diem for that day.
 - If you have a business meeting where you pay for other people’s meals as well as your own, submit the entire bill for the food and then subtract ¼ day per diem for that day. For example, if you pay for a business luncheon that includes non-UConn guests, you would reduce your per diem by ¼ day for that day and receive ¾ day per diem for that day.
- Alternatively, you may submit actual meal receipts, but you cannot be reimbursed more than \$54.00 per day inclusive of all taxes and tips (even if your receipts total more than that or the per diem rate is higher for your location).
- You cannot be reimbursed for alcohol.

- **Mileage:**

- If you use your vehicle for official business, you may be reimbursed for the mileage traveled between your duty station and your business destination. The mileage reimbursement rate is equivalent to the GSA or Federal rate and can be found at <http://web.uconn.edu/travel/miles.html>.

- **Travel Reimbursement Request:**

- When you come back from your trip, please submit all original receipts for reimbursement as soon as possible. Please organize all of your receipts by taping them onto 8½ x 11-inch paper and indicating the purpose of each expenditure. Make sure that all amounts are legible.

- All requests for reimbursement must be filed within 180 days of your return. If you have a travel advance, your reimbursement request **MUST** be submitted within 120 days; otherwise your advance is considered taxable income. Also, if the grant/account that you are traveling on has an upcoming end date, please submit your travel well before that deadline!
- Submit your boarding passes with your reimbursement request as evidence of your travel. If you do not have your boarding passes, please submit another original receipt from your destination.
- After we have received all of your paperwork, the CHIP Business Office will start processing your reimbursement within 3 business days. We will need your original signature on the reimbursement request, so please let us know when you will be available to sign it.
- **IMPORTANT NOTE:** Once a reimbursement request has been submitted to the Travel Office, it takes at least 4 weeks for UConn to issue the reimbursement.