



# The University of Connecticut Travel and Entertainment Policies and Procedures



## **University of Connecticut**

University Business Services  
and Accounts Payable  
3 Discovery Drive, Unit 6220  
Storrs, CT 06269-6220

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## PURPOSE

The University of Connecticut (University), here defined as all campuses and programs except for UConn Health, 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 business 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 University Business Services for guidance before they arrange their travel.

This policy applies to all University employees, students, and guests, including but not limited to recruits and job candidates. The policy shall also apply to the travel and entertainment expenses of contractors, unless the applicable contract provides terms inconsistent with this policy. Where the policy is intended to apply differently to any of the above University business travelers, it will be so stated in the appropriate section of the policy. This policy covers all types of University travel for individuals, groups, and team travel. Employees covered under a collective bargaining agreement ("CBA") may be subject to additional and/or different policies and procedures regarding travel and entertainment. For such employees, in the event of a conflict between this policy and the applicable CBA, the CBA shall control.

## GENERAL GUIDELINES

Employees can be reimbursed for certain travel and entertainment expenses related to University business. University business expenses are the ordinary and necessary expenses of conducting your job, are not lavish or extravagant, and are not for personal purposes. To be reimbursable, such expenses must be reasonable and appropriate to the circumstances, and in the case of federal grant and/or grant-based sponsored travel, conform to the sponsor requirements as described below under “Sponsored Program Travel” and highlighted in specific sections of this policy. All reimbursements are subject to final review and approval from Accounts Payable.

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. Travelers should also be aware of the Protection of Minors policy (<https://policy.uconn.edu/2016/03/29/protection-of-minors-and-reporting-of-child-abuse-and-neglect-policy/>).

Any scanned receipts or documents attached in Concur may be disposed of after final approval of the expense report, but it is recommended that the traveler retain the receipts for a minimum of 60 days.

### ELIGIBLE FOR REIMBURSEMENT

With appropriate justification and documentation, travelers can be reimbursed for airfare, railroad tickets, conference registrations, mileage, tolls, lodging, meals, car rental, parking, and other relevant business expenses.

Travelers may receive reimbursement for expenses incurred on travel day(s) as follows:

- Preceding a conference, meeting, etc.
  - Outbound flight segments less than eight (8) hours in duration – one day
  - Outbound flight segments exceeding eight (8) hours in duration – two days
- Following a conference, meeting, etc. – one day

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 University Business Services if they have any questions about what may be reimbursed.

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

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

In special circumstances, exceptions to these policies may be warranted. The President or Provost, or their authorized designees, may review and grant exceptions, as may the Executive Vice President for Administration and Chief Financial Officer, or the Athletic Director. Exceptions are subject to final review and approval by Accounts Payable. Additionally, individuals who require accommodations for reasons of health or disability may seek reasonable exceptions to this policy. Individuals who seek such accommodations may seek the assistance of the Department of Human Resources.

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

## **NOT ELIGIBLE FOR REIMBURSEMENT**

Employees are responsible for getting to and from work each workday. Employees will not be reimbursed for mileage associated with their normal commutes, regardless of the location of their home in relation to their official duty station at the University. Moreover, when an employee travels from their home to an off-site business destination (including an airport or a rail station), only the difference between the mileage to the off-site destination and the mileage of the employee's normal commute is eligible for reimbursement. In other words, employees must deduct the mileage of their normal commute when they claim mileage for travel from their homes to business destinations.

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

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

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

Travelers will be responsible for no-show fees (e.g., airfare, hotel, etc.), unless in rare circumstances the no-show fee relates to a business reason or an emergency that prevented the traveler from cancelling. The justification must be documented and provided to Accounts Payable, which may require approval from the appropriate Department Head, Director, or Dean. These fees are typically not reimbursable in the case of federal grant and/or grant-based sponsored travel.

Expenses paid with credits received from rebates, points, vouchers, etc., are not eligible for reimbursement regardless of how the credits were earned.

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

## **REIMBURSEMENT APPROVAL**

To avoid actual or apparent conflicts of interest, and to ensure proper separation of duties, employees may not approve payment or reimbursement for their own expenses, expenses of a close relative, expenses related to an event in which they participated, or expenses of an individual to whom they directly or indirectly report.

Employees' travel and reimbursement requests are subject to approval by supervisors, the Fiscal Officer of the account(s) from which the expenses are paid and Accounts Payable. These constituencies share responsibility in enforcing this policy and confirming that all reimbursements are supported with a business purpose and clear

documentation. Additionally, travel expenses funded by sponsored awards administered by the University will be reviewed by Sponsored Program Services and the Principal Investigator (PI). Final approval of the expenses is subject to review by Accounts Payable.

To be reimbursed, travelers must submit receipts for: (i) expenses greater than \$50 that are paid for using the University Travel Card; and (ii) expenses greater than \$25 that are paid for by means other than University Travel Card. Further specific requirements for airfare, rental car, meal, lodging, and entertainment reimbursement are provided in the applicable Policies and Procedures section. The reimbursement approval for non-employees, students, and student athletes follows the same reporting line approval of the funding source.

## **Procedure**

To be reimbursed, travelers are requested to submit a Concur expense report, along with all supporting documentation, within fifteen days of returning from a trip. The University is committed to the timely processing of financial transactions as an integral part of operations, and is also observant of the tax rules applicable to employee reimbursements. Therefore, reimbursements submitted later than 60 days after travel is complete will be paid only at the discretion of the appropriate Department Head, Director, or Dean, subject to final review and approval by Accounts Payable. In no event will reimbursements submitted later than 120 days after travel is complete be reimbursed, even with approval from the appropriate Department Head, Director, or Dean.

## PART 1: PLANNING BUSINESS TRAVEL

### 1a. AUTHORIZATION TO TRAVEL

The University requires pre-approval for travel that involves any travel segment (Airfare, Hotel or Car Rental) for employees, students and guests. Individuals who incur travel expenses relating to any travel segment (Airfare, Hotel or Car Rental) without prior approval from their supervisor bear the risk that their expenses may not be reimbursed upon return. The decision to reimburse a traveler in connection with travel that had not been pre-approved will be at the sole discretion of the President, Provost, Executive Vice President for Administration and Chief Financial Officer, or Athletic Director (or their designees).

Further, travelers are strongly encouraged to secure a pre-approval through Concur's Travel Request module for travel that does not involve a travel segment (e.g., day trip to Boston or New York City), as this will enable monitoring in the event of an emergency. See Section 1g below.

Travelers should make every effort to reserve travel as soon as practicable, in order to achieve the most cost-effective travel rates.

#### Procedure

Submit a Travel Request through the Concur system.

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### 1b. TRAVEL ADVANCES AND PAYROLL DEDUCTIONS

It is possible to request an advance for certain travel expenses. However, such advances will only be issued in certain limited circumstances, and may not be used for expenses that can be charged to the employee's University Travel Card or that may be paid directly by the University. Advances must be \$500 or more, and may not exceed 75% of estimated travel expenses, excluding those expenses that are eligible to be paid directly by University Travel Card or by the University (such as air tickets, conference registration fees, meals, hotel, or rental cars). Advances will not be issued more than 10 days prior to the employee's departure date. If the amount of an advance exceeds the final reimbursement to which the employee is entitled, the employee will return the excess amount, by check, to Accounts Payable within 15 days from expense report approval.

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 15 days from expense report approval. Similarly, payroll deductions may be used to recover any personal expenses incurred using University funds (including travel card or procurement card, or other). Students may also obtain travel advances, but student advances are the responsibility of the sponsoring department. In all cases, in the event that Accounts Payable is ultimately unable to recover a travel advance from the Student, the unrecovered balance will be charged to the traveler's department.

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 Accounts Payable, the advance request may be processed.

## Procedure

To request an advance, a traveler must complete the travel advance section of the Travel Request in Concur.

### 1c. OFFICIAL TRAVEL PARTIES

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

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

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

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

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

## Procedure

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

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

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



## **1d. SPOUSAL/PARTNER TRAVEL AND ENTERTAINMENT PARTICIPATION**

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

### Bona Fide Business Purpose

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

### Employment Agreement

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

### Accompaniment with No Business Purpose

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

## **Procedure**

The payment or reimbursement of the travel expenses for spouses or partners having a bona fide business purpose requires the written approval of the President, Provost or their authorized designees and is subject to review by Accounts Payable.

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## **1e. COMBINED BUSINESS AND PERSONAL TRAVEL**

Employees may combine travel for personal and business reasons, subject to the guidelines below.

If weekends, holidays, or necessary standby days fall between business travel days the traveler may be reimbursed for a hotel where a cost savings can be demonstrated. Example – if a traveler attends a two-week conference and there is a cost savings by remaining at the conference location over the weekend versus flying home and back during the weekend.

If a traveler chooses to arrive early or to stay longer for non-business reasons, the University will not pay for expenses incurred during additional personal days or any other personal travel expense. The only exception and in special cases, travelers will be able to combine their business and personal travel at a cost lower than if a single trip were only for business. In these special cases, the University will reimburse the traveler for the lower-cost business and personal trip; provided that the traveler has clearly documented the cost savings to the University.

## Procedure

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

The traveler must provide supporting documentation and economic justification from the time of booking, including cost comparisons from the University's contracted and preferred agency on the date of booking.

- If the cost of the combined business and personal airfare is higher than the airfare comparison provided from the preferred travel agency, then the airfare will be capped at the comparison provided.
- If the cost of the combined business and personal airfare is lower than the airfare comparison provided from the contracted and preferred travel agency, then the University will reimburse the traveler the lower cost of the actual airfare that included business and personal.

Failure to obtain these cost comparisons from the University's contracted and preferred agency on the date of booking may result in the University not reimbursing the cost of the airfare.

### 1f. FELLOWSHIP TRAVEL

Travel by University Fellows, to be reimbursed or otherwise paid by the University, must adhere to the guidelines contained throughout this policy. Such travel may be taxable to the Fellow under IRS guidance.

### 1g. MONITORING IN EVENT OF EMERGENCY

The University considers the wellbeing of its employees and students to be paramount during travel. As such, the University is providing a travel monitoring and communication tool for all who are undertaking travel as part of their role at the University. This tool enables the University to know the location of employees and students while traveling, and in the case of an emergency, provides the ability to communicate with travelers, ensuring their safety and/or providing safety instructions. Travelers should complete and maintain their profile information, including mobile phone numbers and contact details within Concur to ensure immediate and effective communication is available when needed.

Support in the event of an emergency can be extended to travelers in a variety of ways, the most efficient of which is through knowledge of the dates, times, and locations of University travelers as entered in a Travel Request in Concur. For travel where pre-approval is not required, travelers are highly encouraged to submit a Travel Request in Concur prior to their departure. This procedure applies to all University travel, regardless of destination, duration (including in-state and out-of-state day trips), or source of funding. Failure to submit a Travel Request in Concur prior to departure will delay communication to the traveler in the event of an emergency.

Further, international travelers are encouraged to register international travel destinations with the U.S. Department of State prior to departure. International travelers must adhere to UConn's Policy for Education Abroad and Related Activities in Sites with U.S. Department of State Travel Warning/Travel Alert and UConn's Student International Travel Policy when applicable.

### 1h. SPONSORED PROGRAM TRAVEL

Travel is a direct cost to a sponsored project when such travel will provide direct benefit to the award and is:

- **Allowable:** The cost must be allowable under both the provisions of the Office of Management and Uniform Guidance and under the terms of a specific award.
- **Allocable:** The cost must be allocable; that is, the expense can be associated to a project with a high degree of accuracy.

- **Reasonable:** The cost must be reasonable; that is, the cost reflects what a “prudent person” would pay in a like circumstance.

If federally funded, sponsored awards are subject to certain federal laws and the guidelines set forth in the Uniform Guidance, 2 CFR Part 200—uniform administrative requirements, cost principles, and audit requirements for federal awards. All sponsored project awards may be subject to specific agency restrictions, as well as the remainder of this policy. The terms and conditions of the individual agreement should be reviewed prior to incurring and/or submitting any travel for approval or for reimbursement. The terms of this travel policy apply to all sponsored programs unless the sponsor’s requirements are more restrictive; if they are, then the sponsor rules must be followed. The Principal Investigator is responsible for the financial stewardship of their award and for adhering to sponsor and University requirements for travel, and the spending of sponsored funds in general.

The following list highlights some common sponsored travel restrictions. Some awards **may**:

- Prohibit foreign travel
- Require pre-authorization by Sponsor for each trip
- Restrict the number of trips that can be taken
- Restrict the number of travelers on an authorized trip
- Set a maximum dollar value per trip
- Allow attendance to a conference to present research, but not for the purpose of “staying current in the field”
- Limit travel to a specific destination or purpose
- Specify maximum meal, mileage or other cost rates.

Sponsored travel must be justified, well-documented, in compliance with the sponsor requirements, and incurred within the period of the award. Travelers on sponsored funds must provide sufficient explanation so that anyone reviewing the transaction can verify that it is allowable, allocable, and reasonable to the project charged. Charges that are split between two or more projects must demonstrate how the trip specifically benefited each project respectively.

Entertainment costs are not allowable to a sponsored project without explicit prior approval from the sponsor and Sponsored Program Services.

#### Federal airfare

The federal Fly America Act mandates that travel sponsored by the federal government must be on U.S. airlines or a foreign air carrier that code shares with a U.S. flag carrier on the flight taken, subject to certain limited exceptions. This includes flights within the U.S. If there is no U.S. carrier to your destination, you must travel on a U.S. carrier as far as possible. By law, additional cost for U.S. carrier flights is not sufficient justification to fly on foreign carriers. Please note that the same rules apply to a foreign visitor’s flights.

One exception to this requirement is transportation provided under a bilateral or multilateral air transport agreement called “Open Skies Agreements.” There are currently four Open Skies Agreements that permit traveling on a European Union, Norwegian, Icelandic, Australian, Swiss, or Japanese carrier under specific circumstances.

Though the federal Open Skies policies allow the use of foreign airlines, the easiest and safest way to comply with Federal air travel regulations is to continue to book flights only on U.S. airlines. The use of a U.S. air carrier is required on Department of Defense (DoD) awards even when there is an Open Skies Agreement in place.

Fly American and Open Skies are covered further in the Air Travel section of this policy.

## PART 2: AIR TRAVEL

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

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

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

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

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### 2b. AIRPORT PARKING

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

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

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

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

Individuals who are parking at an airport other than Bradley International Airport should park at the lowest-cost economy parking lot.

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

## **Procedure for Parking at Bradley International Airport**

### Prior to Travel:

To obtain a parking permit, the traveler must select yes on the Bradley Parking Pass field in the Concur request. After the Concur request is approved, a parking permit will be mailed if the departure is greater than 5 business days away. Travelers that are departing sooner than 5 business days may pick up their parking permits at the front desk of Accounts Payable. It is the traveler's responsibility to obtain the parking pass before departure.

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

### At the Airport:

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

### After travel:

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

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

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## **2c. COMMERCIAL AIR TRAVEL**

Employees should generally purchase the lowest commercial airfare available, but may also make reasonable allowances for practicality and preferences such as safety, scheduling and any need for special accommodations. Travelers are strongly urged, but not required, to use the University's contracted and preferred agency to book airline travel. Additionally, individuals who require accommodations for reasons of health or disability may seek reasonable exceptions to this policy. Individuals who seek such accommodations may seek the assistance of the University's Office of Diversity and Equity.

As an agency of the State of Connecticut, the University has a duty to promote economic development within the state by using Connecticut facilities such as Bradley International Airport. Accordingly, employees are directed to use Bradley International Airport, or another Connecticut-based airport, for commercial air travel whenever it is cost-effective. In determining whether travel is cost-effective, travelers should consider additional costs that would be incurred in traveling to an airport in a different state (e.g., mileage and/or meals). Travelers should also consider the fact that the Connecticut Airport Authority provides free parking to state employees traveling on state business, whereas travelers might otherwise pay for parking at an airport in a different state.

Travelers may not insist on non-stop flights. In determining the lowest and most practical commercial fare, the traveler should consider not only non-stop flights, but also flights with one connection (both departing and/or returning).

Travelers should purchase non-refundable tickets unless a refundable ticket is documented to be within \$50 of the non-refundable ticket for the same flight.

First class air travel rates will not be paid for or reimbursed by the University. The University will allow business class travel only on flights with at least one flight segment exceeding eight (8) hours in duration. All business class ticketing must be booked through the University's contracted and preferred agency. Business class airfare may not

be charged to a federal sponsored award, and the cost in excess of the coach fare must be charged to an account other than the federal grant/contract, except when traveling coach would: (1) require circuitous routing; (2) require travel during unreasonable hours; (3) excessively prolong travel; (4) result in additional costs that would offset the transportation savings; or (5) offer accommodations not adequate for the traveler's medical needs. The traveler is responsible for documenting the foregoing exceptions.

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

Travelers should make every effort to reserve airfare as soon as practicable, in order to achieve the most cost-effective fares. Contact the University's contracted and preferred agency or University Business Services if you have any questions on how to secure the most cost-effective airfares. Accounts Payable reserves the right to question unreasonable airline travel costs.

## **Procedure**

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

### Contracted (Preferred Method)

Travelers are strongly encouraged to make travel reservations and ticket purchases with the University's contracted and preferred agency, available through the link available at <http://travel.uconn.edu>.

### Non-Contracted

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

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

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

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

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

approval by Accounts Payable.

## **2d. BAGGAGE FEES**

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

### **Procedure**

Travelers should attach receipts or documentation, if applicable, for baggage fees, specifically detailing the traveler's name on the Concur expense report.

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## **2e. UNUSED TICKETS**

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

### **Procedure**

If the traveler purchased a ticket using the University's contracted and preferred 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 future business travel. If the ticket is refundable, the agency will apply the credit to the University's procurement-card number on file. Tickets purchased by the University remain University property, and may not be used for personal purposes.

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

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## **2f. CHARTER AIR TRAVEL FOR OFFICIAL TRAVEL PARTIES**

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

### **Procedure**

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

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

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

## **PART 3: GROUND TRAVEL**

### **3a. GROUND VERSUS AIR TRAVEL**

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

#### **Procedure**

To obtain reimbursement for ground transportation when air travel is more time-effective (taking into consideration additional time requirements of air travel such transportation to and from airports, parking, and connections), travelers must document the cost comparisons of ground travel versus air travel using itineraries from University's contracted and preferred agency, and include the documentation on Concur's expense report.

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### **3b. RAIL TRAVEL**

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

#### **Procedure**

Travelers should book rail travel independently. Travelers who book rail travel independently should attach all original and applicable receipts, tickets and itineraries to the Concur expense report.

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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: <https://fo.uconn.edu/departments/motor-pool/>. Also, the Connecticut Department of Administrative Services provides a "Policy for Motor Vehicles Used for State Business": <https://portal.ct.gov/-/media/DAS/Fleet-Operations/DAS-GL-115.pdf?la=en>.



### **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 University Business Services website. Travelers will be reimbursed for trip related tolls and parking.

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

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

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

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

Consistent with requirements of Connecticut State Agencies, it is the responsibility of the traveler to maintain automobile insurance in the minimum amounts of \$50,000/\$100,000 (third party liability) and \$25,000 (property damage liability), if using his or her personal vehicle for business purposes.

Unless permitted by collective bargaining agreements or exception to policy, travelers will not receive reimbursement for travel on the Storrs Campus, between the Storrs and Depot Campuses, between the Storrs campus and local buildings in which University employees are housed (e.g., 28 Professional Park), or between the Storrs campus and Storrs Center.

#### **Procedure**

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

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### **3e. RENTAL VEHICLES**

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

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

University-contracted rental rates for domestic travel already include the following insurances: collision, third party liability, and property damage liability insurances. This coverage is required, and is available at an additional charge for international renters and young renters. The University will not pay for or reimburse the traveler for additional insurance. However, additional charges for GPS and roadside assistance may be reimbursed at the discretion of the Department Head, Director, or Dean subject to final review and approval by Accounts Payable. Travelers are encouraged to obtain the authorization of their respective departments prior to incurring such additional charges.

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

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

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

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

## **Procedure**

Reservations using the University's preferred rental car vendors (currently Enterprise and National) can be secured by using the University's preferred and contracted agency.

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

Note that, in all cases, travelers will be required to present a credit card and driver's license when picking up their vehicles.

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

## PART 4: LODGING

When overnight accommodations are required to conduct 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.

### 4a. OUT-OF-STATE LODGING

#### Overnight accommodations of less than 30 consecutive nights.

Such lodging may be reserved by following the procedure section below. Any lodging expense that exceeds the federal per diem lodging rate by more than fifty percent (excluding taxes) requires the approval of the Department Head, Director, or Dean, subject to final review and approval by Accounts Payable. Federal per diem lodging rate can be found at [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem).

Exception for certain conference lodging expenses: rates for lodging provided through a conference may exceed the federal per diem rate by more than fifty percent (excluding taxes), without Department Head, Director, or Dean approval. Travelers are encouraged to reserve conference lodging as early as practicable, and before any lodging discount offered to conference participants expires.

#### Overnight accommodations of 30 consecutive nights or more.

In order to secure the most cost-effective long term accommodations, when University business requires lodging for 30 consecutive nights or more, the traveler is strongly encouraged to work with the Procurement Services Department to arrange these long term accommodations. Procurement Services will make efforts to secure long term accommodations with meal preparation facilities, which will allow the traveler the option to purchase groceries and prepare meals, generating meal cost savings.

### Procedure

#### Overnight accommodations of less than 30 consecutive nights.

Travelers and travel arrangers are encouraged, but not obligated, to reserve lodging through the University's contracted and preferred agency, as a number of discounted rates are available. When special conference or event lodging rates are available, special rate information must be provided to the University's contracted and preferred agency at the time of booking.

Travelers must justify lodging expenses that exceed the federal per diem lodging rate by more than fifty percent by destination and obtain approval from their Department Head, Director, or Dean.

Travelers are encouraged to ask providers of lodging for discounts provided to governmental employees.

Federal per diem lodging rates are available through the University Business Services Website or from the GSA at [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem).

#### Overnight accommodations of 30 consecutive nights or more.

Travelers are strongly encouraged to work with the Procurement Services Department to arrange accommodations.

#### **4b. IN-STATE LODGING**

Subject to prior approval from the appropriate Department Head, Director, or Dean, travelers on University business may reserve in-state lodging when the distance they are required to travel is more than 75 miles, one-way, from both their official duty station and their personal residence. For example, if the traveler's destination is less than 75 miles from his or her personal residence, the traveler may not reserve in-state lodging even if the mileage from the traveler's official duty station is more than 75 miles away.

Travelers may reserve in-state lodging when attending a conference within the State of Connecticut, regardless of distance from official duty station, provided the applicable procedures to attend the conference were followed.

In-state lodging may be reserved by following the procedures applicable to out-of-state lodging included in Section 4a.

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#### **4c. USE OF LOCAL HOTELS**

The University recognizes that, from time to time, it may be important and in the best interests of the University to provide on campus or local lodging to certain individuals. UConn encourages the use of contracted preferred hotels in the local area.

##### University Business Guests, Candidates, Recruits and Affiliates

Lodging at local hotels can be provided to University business guests, such as candidates, recruits and affiliates.

##### University Employees

In rare circumstances, a University employee may require local lodging (within 10 miles of Storrs or assigned duty station) in order to carry out his or her duties as a University employee. In these cases, the employee must receive prior approval for the stay from the Office of the President, the Provost, the Executive Vice President for Administration and Chief Financial Officer, or Athletic Director, based on the reporting relationship of the employee. Please note such lodging will generally be taxable to the University employee.

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

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

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

## **Procedure**

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

Group Lodging (over \$10,000): Group lodging in excess of \$10,000 requires a purchase order to be processed through the Procurement Services Department. A minimum of three written quotes must be secured directly from the hotels or from the University's contracted and preferred 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 process a requisition and attach the justification and relevant documentation with the contract. The Procurement Services Department will issue a purchase order upon full compliance.

## PART 5: MEALS

### 5a. MEALS FOR UNCLASSIFIED EMPLOYEES (WHILE TRAVELING)

Travelers belonging to one or more of the groups below may claim reimbursement for the actual cost of their meals incurred while traveling on University business (substantiated with original receipts) or they may claim reimbursement up to the meal per diem rates published by the GSA / U.S. Department of State. Deans of Schools and Colleges and other administrative leaders (e.g., President, Provost, Vice Presidents, Vice Provosts, or Athletic Director) may set restrictions on per diem reimbursements that are lower than those specified in this policy, which they should document and communicate to travelers in their units. Meals or per diems for travelers related to sponsored research will be reimbursed in line with the funding agency's guidelines or their approved budgets. Travelers requesting reimbursement for meals using the per diem method should not use their University Travel Card to purchase meals.

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

The maximum reimbursement for actual meal costs, including tax and tips, over the course of travel may not exceed the meal per diem applicable to the course of travel, based on the meal per diem rates published by the GSA / U.S. Department of State (Please note that GSA and U.S. Department of State published per diem rates include both meal and incidental components.). In calculating the meal per diem applicable to the course of travel, the first and last day of travel will be 75% of the daily meal per diem.

Additionally, if a meal was provided, the meal per diem applicable to the course of travel is reduced by the per diem applicable to the meal provided (see Section 5d below).

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

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

#### Procedure

##### Reimbursement of actuals:

Submit actuals on the Concur expense report along with the related receipts. Receipts are required for meals of \$50 or greater purchased on a University Travel Card or \$25 or greater if purchased by means other than University Travel Card. See Section 5d below for procedures regarding meals that are provided to the traveler.

##### Submission of meal per diems:

Submit a Concur expense report and choose meal per diem within the report.

## **5b. MEALS FOR CLASSIFIED EMPLOYEES (WHILE TRAVELING)**

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

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

All expenses are only eligible for reimbursement based upon funding. Departments are still allowed to request that travelers hand in receipts in order to limit expenses.

### **Procedure**

See Section 5a above for procedures for claiming meal reimbursements.

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

Unless otherwise provided under Collective Bargaining Agreements, travelers who are required to travel for University business without an overnight stay may be eligible for meal reimbursement if the traveler is away from his or her home and official duty station for more than ten hours and the reimbursement requests are occasional and non-routine. Consistent with IRS guidance, such reimbursements will be treated as taxable income to the employee and will be included in the employee's W-2 wages.

Travelers seeking reimbursement of actual meal costs must submit receipts for meals of \$50 or greater purchased on a University Travel Card or \$25 or greater if purchased by means other than University Travel Card. Travelers seeking reimbursement of meal per diem do not need to submit meal receipts.

In these instances, the actual meal expense or per diem cannot exceed 75% of the GSA per diem rate in effect for the destination of travel.

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## **5d. CONFERENCE AND OTHER MEALS PROVIDED**

All travel related to conferences (also called seminars, workshops, retreats, conventions, etc.) must have itineraries/brochures attached to the expense report relating to the conference. At the time of pre-approval, travelers must provide a description of the conference details, including dates and subject matter of conference. If available, a conference brochure should be attached. Conferences frequently provide meals to attendees as part of the registration fee. As discussed below, the traveler is generally not entitled to a meal per diem allowance or actuals for meals that are provided 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 accommodation. See section 5a above.

### **Procedure**

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

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

From time to time, it is necessary to the interests of the University to host or provide meals to University guests such as job candidates, visiting scholars or donors. Likewise, a meal may be an essential or important part of an event, such as a conference or workshop, which is conducted by the University. All meals, other than those provided to an individual travelling on University business, must qualify as a “business meal” under the requirements and procedures of this section, in order to be provided or reimbursed by the University.

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

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

1. University employees are generally responsible for paying for their own meals when they are not traveling.
2. University funds may not be used for meals at social functions, such as parties or summer outings, attended entirely or primarily by University employees and/or their personal guests.
3. The number of University-affiliated persons (employees and spouses, where appropriate) attending business events (including meals) with University guests should be limited to those essential to the University’s business
4. University funds may not be used to purchase alcoholic beverages.
5. In most cases, business meals may not be charged to sponsored awards (the responsible OVPR, SPS Grant Manager may provide more information or grant exceptions where appropriate). See section 1h.

See also the University’s policy re: “Use of University Funds for Gifts, Social Functions, Sponsorships & Donations.”



Meals between faculty/staff and students, while allowable when there is a business purpose, should be infrequent. In addition, Departments 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 Departments are called together for a substantial meeting, or when stopping the meeting to allow employees to leave for a normal meal would be disruptive and inconvenient for the University.

For the avoidance of doubt, this policy shall extend fully to business meals that are paid for by interdepartmental transactions, such as meals purchased through Dining Services.

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

For all business meals, including group meals, organizers should limit attendance to essential guests only. Without proper justification, the University will not reimburse expenses for spouses, partners or non-essential guests. Further, the number of University-affiliated persons (employees and spouses, where appropriate) attending business events (including meals) with University guests should be limited to those essential to the University's business. Under no circumstances may the cost of the meal for each guest (including taxes and tip) exceed three times the appropriate GSA or U.S. Department of State Per Diem meal amount for the location. It is recommended that the most senior-ranking UConn employee in attendance pay for the business meal.

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

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

## **Procedure**

As with any business expense, the Concur expense report for business meal reimbursements must document the date, place, and business purpose of the meal, as well as the individuals in attendance and each individual's affiliation to UConn.

All catering needs requiring a deposit and/or an agreement/contract must be submitted to Procurement Services on a requisition. Catering needs under \$2,500 may be submitted on a Disbursement Voucher.

Departments with the ability to control or request Foundation funds are encouraged to consider use of these funds as the primary reimbursement method to cover the expense of business meals. If Foundation funds are to be used and the expense is permissible and reimbursable under University policy, these expenses can be submitted through Concur on an expense report using the appropriate 6 ledger Foundation account. If the expense is not permissible and reimbursable under the University's policy (e.g., it includes alcohol) then Concur cannot be used and the expense will have to be submitted directly to the Foundation for reimbursement.

## **5f. GRATUITIES**

### Meals

Reimbursement for actual meal gratuities will be limited to 20% of the meal cost.

### Incidental expenses

Travelers using the actual expense method will be reimbursed for incidental expenses (gratuities for baggage handling, maid service, etc.) not to exceed the published GSA or U.S. Department of State Incidental Expense per diem amount.

### Other Gratuities

Gratuities for other travel services, including but not limited to taxis and rideshare, are reimbursable at a rate not to exceed 20% of the cost of the service.

## 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. Travelers are encouraged to reserve conference as early as practicable and in time to secure any early booking discounts.

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

#### Procedure

Travelers may use the following methods to pay registration fees:

- 1) Payment with University Travel Card (Preferred Method)
- 2) Payment with University Procurement Card
- 3) Personal Payment
- 4) If no other options are available, the Department can submit a DV in HuskyBuy to prepay the registration fees.

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

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

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

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

## **Procedure**

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

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### **6c. FOREIGN CURRENCY RATES**

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**

Concur will translate certain foreign currencies as part of the expense report.

For currencies not converted by Concur, travelers may account for currency conversion in one of two ways:

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

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

#### **Procedure**

Travelers should submit documentation and receipts for expenses incurred for these services with the Concur expense report.