

Travel Costs on Sponsored Programs

1. Overview

The University will reimburse individuals for travel expenses on sponsored programs where there is a direct benefit to project and the expenses are necessary, reasonable, and approved. The Principal Investigator (PI), or designee, shall review and approve the expense reimbursement to ensure compliance with University 40.4.1 Travel and Business Expense Policy, University 40.4.2 Faculty and Staff International Travel Policy, and terms and conditions of the sponsored program. All supporting documentation on purpose, destination, expenses, and dates of trip is to be retained by the department for audit purposes.

2. Purpose

Provide guidance to PIs and staff for travel associated with sponsored programs and to establish guidelines and procedures for compliance with Federal regulations and sponsor requirements.

3. Who Must Comply

Approvers (*all individuals approving expenses on sponsored programs*)
Research Financial Services
Principal Investigators
Travelers (*all individuals travelling on sponsored programs*)

4. Definitions

Approver: An individual with the responsibility to review travel expenses for reasonableness, necessity, and appropriateness with signature approval on the specific sponsored program.

Circuitous Routing: A travel route that is indirect or roundabout.

Due Diligence: The pursuit of knowledge and facts to make an informed decision. This may require consultation with a supervisor and/or Research Financial Services, Office of the University Controller or University Procurement Services.

Expense Report: The form used to account for travel and other business expenses. Expense reports are subject to review by internal auditors, external auditors (including state and Federal grant agencies), and the Internal Revenue Service.

International Travel: Any travel outside the United States and its territories and possessions, and Canada.

Necessary: An expense that is required to achieve the expected goals or outcomes of the project, where there is a clear business purpose.

Reasonable: Exercise the same care that a prudent traveler would be expected to exercise if traveling on personal business and be cognizant of our responsibility for proper stewardship of sponsored funds.

Receipt: An original document itemizing purchase. The receipt must provide a named payee and date that confirms payment has been made for a stated purchase.

Travel Advance: A request, made by a traveler, for University funds in advance to pay for upcoming travel related expenses.

5. Procedures

All travel on sponsored programs shall follow University 40.4.1 Travel and Business Expense Policy, 40.4.2 Faculty and Staff International Travel Policy and the following sections. In addition, U.S. General Services Administration per diem rates (meals, incidentals, lodging) shall supersede the University Travel Policy for all federally sponsored travel.

Approvers have primary responsibility for ensuring compliance with university policy, sponsor policies, and award terms. They must also ensure that proper documentation is provided in the expense report. The approver must verify that the expenses are necessary, appropriate, reasonable, and charged to the proper project.

The approver should also ensure that sponsor approval of the travel is documented. If sponsor approval of travel is recorded via the proposal budget, budget narrative or scope of work, no additional action is required. Otherwise, the approver should ensure that written sponsor approval of travel activities is included in the travel approval and/or expense report documentation.

Under no circumstances may individuals approve their own expense reports or that of their supervisors. Expense reports are to be approved by the traveler's supervisor or Principal Investigator.

Travel Advances

Travel advances secured for sponsored program travel shall be charged to discretionary funds and not sponsored funds. Within 30 days of the completion of travel, the employee shall submit an expense report reconciling the advance and charging all applicable expenses to the sponsored program. When the expense report is processed, the discretionary fund will be automatically reimbursed for the travel advance.

Airfare

Travelers on sponsored programs are expected to use the lowest available economy airfare unless it is documented that this travel involves circuitous routing, unreasonable hours or excessive travel times. Airfare will be reimbursed for the actual cost upon return from the trip. The following documentation must be attached to expense report: proof of payment, boarding pass or similar documentation.

International Travel

Requests to travel internationally must be included in the proposal and meet allowable cost policy and sponsor requirements. Fly America regulations and the associated Open Skies Act require travel only on USA flagged air-carriers for Federal projects unless sponsor prior approval is received in advance, regardless of cost or convenience. The only exceptions are when:

- A USA flagged air carrier does not provide service on segment of trip
- The use of USA flagged air carrier unreasonably delays travel time, defined as;
 - Travel time is 6 hours longer than foreign carrier
 - Plane changes of 2 or more over foreign carrier
- Medical or safety reasons

For travel that is not funded by the Department of Defense (DoD), Open Skies Agreements allow travelers to take domestic carriers for in-country travel. The following are a sample of the Open Skies related exceptions that apply to sponsored program travel expenses. For a full list, please visit the United States Department of State website.

- Travel originating/ending in Australia may use an Australian carrier
- Travel originating/ending in the EU may use an EU carrier
- Travel originating/ending in Switzerland may use a Swiss carrier
- Travel originating/ending in Australia may use an Australian carrier

Cancellations

In circumstances where the traveler elects to cancel their plans, any associated expenses may not be charged to the sponsored program.

In circumstances where travel activities are cancelled by a third party, travelers may charge cancelled travel activities to sponsored programs to the extent such expenses are allowable, allocable and align with institutional guidelines. This includes extraordinary circumstances that adversely affect the University’s ability to conduct sponsored activities, as determined by the University President or Board of Governors (e.g. COVID-19).

6. Roles & Responsibilities

Approver	<ul style="list-style-type: none"> • Review and approve only those sponsored program related travel approvals, advances and expense reports that comply with all applicable award terms and conditions, as well as all sponsor and University policies
Research Financial Services	<ul style="list-style-type: none"> • Review sponsored program travel expenses at the time of sponsored program closeout and ensure high-level compliance with all applicable award terms and conditions, as well as all sponsor and University policies
Traveler	<ul style="list-style-type: none"> • Ensure that all sponsored program travel complies with all applicable award terms and conditions, as well as all sponsor and University policies
Principal Investigator	<ul style="list-style-type: none"> • Review all sponsored program expenses, including travel, to ensure they are allowable, allocable and reasonable

7. Resources

Related Policies

- 40.4.1 University Policy: Travel and Business Expense
- 40.4.2 University Policy: Faculty and Staff International Travel

University Department of Risk Management and Insurance: International Travel Registration Instructions

- 30.4.5 University Policy: Records Management
- Allowable Costs on Sponsored programs

Forms

Expense Report
Check Request
Travel Order Form

Guiding Regulations:

Uniform Guidance (UG): 200.474 – Travel Costs
US General Services Administration: Fly America §301-10.136
US Department of State: Open Skies Agreements