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Quick Reference Guide to Traveling on University Business

Revision date 2/18/11

Duration of Travel

- The Travel Policy applies to short-term business travel.
- For trips longer than 30 days and long-term leaves, please contact an
 - Associate or Deputy Provost for faculty, students and visiting scholars or
 - Controller for staff and consultants.

Travel Reservations

- Arrange travel in advance and use Yale's preferred on-line booking tool and travel agency.
- Cancel reservations early to avoid a penalty and notify the business office of any change in travel plans as soon as possible.

Domestic vs International

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

Air Transportation

- Purchase the lowest available class of service (e.g., non-refundable 14-day advance purchase economy class ticket) that is consistent with business needs.
- First class air travel will not be reimbursed by the University.
- Business class travel is not reimbursable for all domestic air travel, or for international trips under 5,000 miles one-way.
- For international travel at or over 5,000 miles (one-way) business class may be used, provided that appropriate funds are available and authorized. Confirm with the business office before purchase.
- Any extenuating circumstances, such as a medical condition, that require an exception to this policy must be approved, in writing, by an Associate or Deputy Provost or by the Controller before the trip.

Car Rental

- For domestic rentals, decline all additional insurance offered by the rental company.
- For international rentals, purchase the damage and liability waiver insurance.

Business Meals

- Travelers may be reimbursed based on either a per diem allowance or actual expenses but may not combine the two methods on an entire trip.
- When some meals are covered by another source or when traveling for a partial day, the per diem should be prorated as follows: 20% Breakfast, 30% Lunch, and 50% Dinner.

Payment Methods/Documentation

- The Yale Purchasing Card is the preferred payment method for all travel purchases. Contact your business office for further details.
Receipts are not required for expenses of less than \$75 and must not be attached to the expense report nor retained once the expense report is processed. It is a best practice, but not required, for the traveler to submit all receipts even those that are less than \$75 to the preparer. After the expense report is processed, the associated receipts under \$75 should be shredded. Approvers have the right to inquire and review receipts for expenses under \$75 in situations that they deem appropriate and in those cases where the funding source requires such receipts.

Submitting Expenses for Reimbursement

- Submit a completed expense report within 10 business days of returning from the trip. Effective April 1, 2011, out-of-pocket expenses (i.e. airfare, conference fees, mileage, hotel, meals, books, etc.) older than 120 days will not be reimbursed. This means that the faculty and staff have a **maximum** of 120 days from the date of the transactions to the date the charges are included on an expense report and submitted for reimbursement through iExpense.

Quick Reference Guide to Determine Whether an Expense is Reasonable

Travelers should use their best judgment in determining whether a certain expense is reasonable, and consult the full Travel Policy for details. The chart below is not comprehensive, but gives some examples and a sense of what is generally acceptable versus what is generally unacceptable for travel expenses.

	ACCEPTABLE	GENERALLY UNACCEPTABLE
Transportation to Airport	Traveler's personal car Airport shuttle Private car service to NY area airports	Stretch limousine for one person
Car Rental	Compact or midsize	Luxury
Airfare	Lowest available economy class fare that meets traveler's business needs. Business class for international trips more than 5000 mile one-way, if funds are available.	First-class Business class for international trips less than 5,000 miles one-way
Hotel	Conference hotel, Marriott, Hyatt	Ritz Carlton, Four Seasons
Gasoline	Gas station	Car rental agency
Travel Agency Service Fees	Fees charged by Yale's preferred travel supplier	Any charge over \$40
Business Purpose Description	"9/1/05 Meeting in Chicago with ABC University to discuss work related to PQR person or to attend a XYZ conference."	"Meeting in Chicago", "Conference" "Travel for Research"
Train	Business class of service on Acela, on Amtrak /regional trains and MetroNorth	First-class service