

**Procedure 3301 PR.01**  
**Travel Arrangements for University Business**  
 Revision Date 4/25/11

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## 1 – Overview

### Some Key Points:

- Arrangements for travel on University business must comply with University Policy [3301](#) *Travel on University Business* and Policy [3415](#) *Payments to Individuals Who Are Neither Citizens nor Permanent Residents of the United States*.
- All expenses must be reasonable, necessary, and in accordance with University policies.
- To obtain the best rates, always book as far in advance as possible and use Orbitz for Business (OFB), the University’s preferred on-line booking tool and travel agency.
- Travelers should book the lowest available class of service (e.g., a non-refundable 14-day advance purchase economy class ticket).
- When necessary, cancel reservations directly with OFB, or the travel agency, or the airline, if the booking was done directly by the airline. Flights must be cancelled prior to departure to retain any value.
- Any exception to this policy must be approved, in writing, **before** the trip. For faculty, postdoctoral fellows, postdoctoral associates, students and visiting scholars, the approval must be obtained from associate or deputy provost or their designee. For staff and consultants, the approval must be obtained from the controller or his/her designee.
- 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.

- Travelers should submit an expense report within **10** business days after incurring the expense or return from the trip.).

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## Reservations for Non-Employees

The University will pay for reasonable travel expenses incurred by non-employees, including University visitors, who are traveling on University business, as defined in Travel Policy [3301](#).

Travel arrangements can be facilitated in one of the following four ways:

1. Departmental travel arranger can go online at [www.orbitzforbusiness.net](http://www.orbitzforbusiness.net) to book the reservation.
2. Departmental travel arranger contacts Orbitz's full-service travel agency at 877-ORBITZ1 (672-4891) to make a reservation.
3. Departmental travel arranger can complete a [Non-Employee/Visitor form](#) and fax (888-656-8545) or email (YaleMeetings@orbitzforbusiness.net) it to OFBand then have the traveler(s) call Orbitz for Business directly to complete the reservation.
4. Departmental travel arranger can complete Form 3301 FR.10, Request to set up a user group, and fax to 203-432-5913 or email to [travel@yale.edu](mailto:travel@yale.edu) and then have travelers book travel directly online.

The travel arranger needs to provide the name(s) of the traveler(s) (as appears on government issued ID or passport), dates, times, and any special instructions regarding airline ticketing (e.g., travelers are musicians requiring extra seats for musical instruments, or has disability requiring assistance).

The arranger and traveler will receive an email confirmation of the transaction.

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## Arrangements for Individuals Who Are Not Citizens or Permanent Residents of the United States

### Payments Other Than Expenses

Department administrators should visit the Office of International Students and Scholars (OISS) website, [Overview of Non-immigrant Visa](#) section, to review recommended immigration status based on type of payments (e.g. honoraria) and length of stay. If the administrator has any questions, he or she should contact OISS prior to an individual's arrival in the United States to arrange for the appropriate visa for the type of payment contemplated. Contact OISS at (203) 432-2305.

### Reimbursement of Substantiated Expenses

Generally, substantiated expense reimbursements paid pursuant to University policy and paid to or on behalf of individuals who are neither citizens nor permanent residents of the U.S. are permissible. Further, such payments are not subject to Internal Revenue Service reporting or withholding. For B1, B2, WB and WT visas, international visitors must complete the International Information Form and submit receipts as stated in the chart. The immigration status code (visa type) is provided on the individual's Form I-94, Departure Record. International visitors with any other visa categories only need to submit receipts for reimbursement. Contact the International Tax Office at (203)432-5597 with questions.

Visa Status	International Information Form (IIF) – complete section 1 only, signature and date	Receipts and other appropriate documentation per University policies and procedures
B1/B2/WB/WT	Yes	Yes
All other visa categories	No	Yes

**Note:** The Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN) is not required to reimburse international visitors for substantiated expenses.

### Restrictions for B-2/WT Visa Status

If the academic activity in which the B-2 or WT visitor is engaged lasts no longer than nine (9) days and the visitor has not accepted payment of expenses and/or honorarium from more than five (5) U.S. institutions or organizations in the previous six months, the visitor is permitted to receive reimbursements paid to or on his or her behalf. If, however, either of these conditions is not satisfied, reimbursement made to or on behalf of the visitor is not permitted.

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## **2 – Making Travel Reservations**

### **Preferred Travel Agency and Online Booking Tool**

The University's preferred vendor for travel services is Orbitz for Business, which provides a full-service travel agency and an online booking tool. All air reservations, plus any hotel and car rental reservations should be made using either the full-service travel agency or the online booking tool.

#### **Advantages of using Orbitz for Business include:**

- university-negotiated rates and discounts for air, hotel (including Club Quarters), train and car;
- no service fee for using the online booking tool (air/hotel/train/car) and a low service fee for full-service travel agency air transactions;
- 24 hour cancellation policy – ability to cancel booked air e-ticket (does not apply to paper tickets) within 24hrs of purchase without penalty;
- management of unused non refundable tickets;
- professional travel agents available 24/7, 365 days a year to assist University travelers;
- international rate desk pricing: capability to secure lowest possible international fares where there are 3 or more legs to a flight;
- free assistance for using online booking tool;
- toll-free number for travel-related emergencies, available 24 hours a day, 365 days a year.

#### **Some additional notes:**

To use Orbitz for Business, the travel arranger will need a credit card, preferably a Yale Purchasing Card or a personal credit card to purchase or reserve air, hotel, rail and car reservations.

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### **Using Orbitz**

All airline, hotel or car rental reservations for a University employee or a non-employee/guest traveling on University business can be made in one of the following ways:

- **Book online via [Orbitz for Business](http://www.orbitzforbusiness.net) link s/b [www.orbitzforbusiness.net](http://www.orbitzforbusiness.net)**

Log on using your University email address. .Click “request a new password”. For further clarification, refer to “[Getting Started](#)” or contact Orbitz for Business directly.

Call Orbitz for Business full-service travel agency at 1- 877-ORBITZ1 (672-4891)

1. Contact a travel representative to determine the best available itinerary. You will be asked for a Yale email address and the telephone number associated with your online account (phone number that was included on the online profile).
2. Orbitz's full-service travel agency may be the best resource to coordinate travel arrangements for multiple travelers, non-employees, multi-leg and international trips or other special situations.
3. Use Form [3301 FR.07](#), *Travel Non-Employee/Visitor* to notify Orbitz for Business of the travel parameters of the event, and the names of the attendees who will be contacting Orbitz directly to make travel arrangements.
4. Provide international attendees with [3301 FR.08](#), Travel Request document as a means for them to fax or email Orbitz for Business with their travel requirements.
5. Use Form [3301 FR.10](#), Request to set up a user group, to set up the parameters of the event and to register your non-Yale employed guests on Yale's OFB site so that they may book travel on line.
6. Use Form [3301 FR.09](#) to request group reservations requiring an airline contract for 10 or more people traveling on the same flights.

7. Instructions on arranging travel for Non-Yale employees and guests, can be found on the Yale Travel Services home page under Arranging Travel for Non-Yale Employees

For more information visit the [Yale Travel](#) Department website or email [travel@yale.edu](mailto:travel@yale.edu).

- **Using Orbitz for Business for leisure travel**

Orbitz for Business is set up expressly for University faculty and staff traveling on university business, and may not be used for making personal reservations. Airline Tickets

#### Ticket Purchases

- Select the flight using one of the methods described in the *Using Orbitz* section (above).
- Because most airlines impose a fee for paper tickets and their related shipping costs, electronic tickets should be used whenever they are available. An electronic ticket confirmation will be sent via email or fax, and should be kept for the traveler's records. The traveler may be asked to present it at the airport check-in process.
- Whether the reservation is made online or via the travel agency, the itinerary will be available on the Orbitz for Business website, under 'My Account >Current Trips'. After travel is completed, a copy of the itinerary will be retained in 'My Account >Past Trips'.
- When making the airline ticket reservation, be sure to use the traveler's name as it appears on passport or government issued ID; airlines do not allow name changes.
- The traveler is responsible for determining the need for, and obtaining, all necessary documents required for travel. Visa information can be obtained by calling Center for International Business Travel (CIBT) at 1-800-577 -2428 and referencing the Yale account number 40634, or by logging into the [CIBT website](#). US citizens may do a Quick Check to see if the country they are planning to travel to requires a visa by clicking [here](#).

#### Changes and Cancellations

If a trip must be changed or cancelled due to University business reasons or circumstances beyond the traveler's control (e.g., conference or event is cancelled), it must be cancelled prior to flight departure to retain value. When applicable, the remaining value of the ticket (less any airline imposed penalties) should be applied to the next business trip,

Travelers will not be reimbursed for trips cancelled, changed, or forfeited (due to failure to cancel prior to departure) for personal convenience.

If the ticket was purchased using federally-sponsored funds, contact the appropriate Office of Grants and Contracts to determine if the cancellation costs may be charged to the grant.

For electronic tickets, the traveler may go online or call Orbitz directly within 24 hours of purchase and cancel the ticket without penalty (defined as 'Courtesy Cancel'). For paper tickets or cancellations done later than 24 hours, the ticket can be changed online or by contacting Orbitz for Business. Airline imposed change/cancellation fees will be displayed when changing the trip. All reservations must be cancelled prior to flight time to retain value.

Certain air tickets (i.e., international flights) do not qualify for cancellation online and require an agent's assistance.

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#### Hotel Reservations

- When traveling to a conference, it is appropriate for the traveler to stay at the hotel hosting the conference, assuming that the daily rate is not unreasonably expensive relative to other alternatives. Call the preferred hotel site as soon as possible to reserve a room.
- The University's preferred hotel properties and rates, including Club Quarters, are included on the Orbitz for Business site and should be utilized when appropriate.
- Hotel reservations require a credit card (Yale Purchasing card or personal credit card) to guarantee the room.
- When making a reservation, use the Yale preferred rate. If available, one may also use a "Low Price Guarantee" rate, which provides a discount but requires full prepayment of the entire hotel cost at

the time of booking. Because Low Price Guarantee rates are purchased from Orbitz for Business they are not tax exempt and should be avoided in the New Haven hotel market.

- The University reimburses travelers for the single occupancy cost of a reasonably priced hotel room (e.g. Marriott)

## **Hotel Cancellations**

Orbitz hotel reservations can be cancelled or changed either online or through the Orbitz full-service travel agency..

If a trip is changed or cancelled because of University business reasons or circumstances beyond the traveler's control (e.g., conference or event is cancelled), the traveler can be reimbursed for penalty fees. Proper documentation is required, including a receipt showing the penalty charge, proof of payment (credit card statement or cancelled check), and reason for the change or cancellation.

Travelers will not be reimbursed for cancellation fees resulting from trip changes or cancellations for personal convenience.

If the reservations were made using federally-sponsored funds, contact the appropriate Office of Grants and Contracts to determine if the cancellation charge may be charged to the grant.

## **New Haven-Area Special Rates and Direct Billing**

The University has contracts with some New Haven-area hotels for special rates for individual travelers on University business. These hotels may direct-bill a University account for rooms reserved under such contracts utilizing a Yale Purchasing Card, or via a purchase requisition. A [current list](#) of these hotels, with rates and purchase order numbers, is available on the [Yale Travel](#) services web site.

To make a reservation, book online with Orbitz for Business, or call the hotel directly and refer to the University contract number. The Yale Purchasing Card or Purchase Requisition can also be used to facilitate the transaction.

*Effective April 1, 2011, payments for hotel meeting/group/catering contracts should be processed through SciQuest, or charged to a P-card. For further details please visit: <http://blu.yale.edu/purchasing-policy-and-procedures-changes-effective-4111> or call the Help Desk 432-900 for assistance*

## **Large Meetings or Groups**

Group space for 10 or more passengers traveling on the same flights, and requiring an airline contract, may be requested from Orbitz for Business via Group Request form 3301 FR.09.

Orbitz for Business can also assist in making arrangements for meetings or groups of travelers departing or arriving at diverse locations and times. Use Form [3301 FR.07, Travel Non-Employee/Visitor](#) to notify Orbitz for Business of the travel parameters of the meeting/group, and the names of the attendees who will be contacting Orbitz directly to make travel arrangements.

[Yale Conference Services](#) provides administrative and support services designed to assist members of the Yale Community in the development, promotion and delivery of quality conferences and seminars including advice about hotels, transportation services, and facilities.

Departments that host or coordinate large meetings or conferences at outside venues, such as New Haven area hotels, should be aware that all hotel agreements need to be signed by the department head or business manager (if the cost is less than \$50,000) or the Controller (if the cost is \$50,000 or greater). University employees (other than the business manager) should not sign direct billing documents or extend the University's credit.

*Effective April 1, 2011, payments for hotel meeting/group/catering contracts should be processed through SciQuest, or charged to a P-card. For further details please visit: <http://blu.yale.edu/purchasing-policy-and-procedures-changes-effective-4111> or call the Help Desk 432-900 for assistance*

## Sales Tax Exemption

Certain lodging and meal expenses incurred while traveling on University business may be exempt from state sales tax. Refer to the [Controller's Office Fact Sheet](#) to see a chart of the states that offer sales tax exemption. **The sales tax exemption will not apply if a traveler makes the payment using a personal credit card.**

If however, a personal credit card is used for travel and small expenses, the University **will** reimburse for sales tax paid. The preferred method for paying for such expenses is through a Yale purchasing card whether or not sales tax is charged and paid. See [www.yale.edu/tax/salesanduse](http://www.yale.edu/tax/salesanduse) for guidance on how to avoid paying sales tax.

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## Car Rental, Train and Other Group Transportation

Travelers are expected to use the lowest cost ground transportation consistent with business needs. For example, many hotels offer free airport shuttles, which should be used whenever practical.

### Rental Cars

Travelers should rent the most economical (compact or midsize) vehicle consistent with business needs and travel circumstances. For a list of preferred vendors visit the [Yale Travel website](#). Yale contract discount rates are available through [Orbitz for Business](#) or by contacting the car rental agency directly.

To rent a car, the traveler must:

- have a valid driver's license;
- have a major credit card in his/her own name;
- be at least 25 years old (some car rental companies have lower or higher age restrictions and may charge an additional fee; refer to the individual car rental company for specific requirement).

The University does not permit the rental of 12- or 15-passenger vans because of the possibility of serious accidents and injury to passengers and will not extend University insurance to these vehicles.

### Insurance

**Domestic car rentals:** when traveling on University business in **the U.S., Puerto Rico, U.S. Virgin Islands and Canada**, the traveler should decline all additional insurance coverage offered by the car rental agency.

**International car rentals:** when traveling on University business to all other countries other than those mentioned above, the traveler should accept liability and damage insurance coverage offered by the agency. The cost will be reimbursed by the University.

Refer to Policy [3301 Travel Policy](#) for information about insurance coverage when non-employees or students are renting a car for University business purposes. For additional information, contact the Office of Risk Management at (203) 432-0140.

### Train

Travelers should book service on Metro-North or Amtrak consistent with their business needs. University policy allows business class service on Amtrak. Yale has negotiated a 30% discount off the Acela business class fare between New Haven and Washington, DC.

To take advantage of the University-negotiated discount on Amtrak, travelers must make reservations using the University's preferred full-service travel agency, Orbitz for Business (1-877-ORBITZ1). Orbitz does not charge a service fee for Amtrak bookings. For more information on the Orbitz process see ["Using Orbitz for Amtrak Reservation."](#)

Metro North provides service to New York's Grand Central Station and offers rates that are more economical than Amtrak; however, tickets must be purchased directly from Metro North.

### Other Ground Transportation

Travelers should use taxis, shuttles and public transportation whenever possible instead of private limousine or car services. Examples of shuttle services are Connecticut Limousine and Prime Time shuttles.

### Private Car Service

The decision to use a private car service should be made by the traveler and departmental business office, based on cost and business needs. Refer to Policy [3301 Travel on University Business](#) for more information on the use of a private car service.

### Use of Personal Vehicles

Travelers who use a personal vehicle when traveling on University business should be aware of the following:

- Use of a personal vehicle for University business will be reimbursed at the federal mileage allowance rate published in the [Controller's Office Fact Sheet](#). This rate covers the cost of vehicle usage, including gasoline. The traveler will not be reimbursed separately for gas expenses; however, tolls and reasonable parking fees will be reimbursed separately.
- If a personal vehicle is used primarily for the traveler's convenience and results in a higher cost than other modes of transportation, reimbursement will be limited to the cost of the lowest-priced airfare between the nearest commercial airport serving the origin and the destination cities or the applicable train coach fare, whichever is lower.

If an accident occurs when a traveler is using a personal vehicle for business travel, the individual's automobile insurance is primary. Contact the Office of Risk Management at (203) 432-0140, and refer to Policy [1705 Automobile Fleet, Rental and Safety Program](#) for additional information.

All transportation options are available on the [Yale Travel website](#).

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## 3 – Payment for Travel

The Yale Purchasing Card is the preferred method of payment for all travel purchases, including airline and train tickets, hotel reservations and payments, conference registration fees, meals, and other business expenses. As an alternative, individuals can also use personal funds (cash, check or a personal charge card) and seek reimbursement. . 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 iExpenseYale Purchasing Card

Yale Purchasing Cards can be used for travel and other business related expenses. Appropriate spending thresholds can be set by the department business office.

Advantages of using the Yale Purchasing Card to pay for travel expenses include:

- costs are billed directly to the University, saving the traveler the out-of-pocket expense resulting from using a personal credit card or other payment method;
- traveler is eligible to take advantage of any state sales tax exemptions available to the University;
- department business manager or designee will receive an email notification of every card transaction;
- electronic receipts for some purchases are automatically routed to the University's Expense Management System (EMS) for proper tracking, when applicable.

When using a Yale Purchasing Card for travel purchases, a billing address (including zip code) and telephone number that are associated with the card is needed. The BUG 701a report now contains the Purchasing Card billing address. If a transaction using a Yale Purchasing Card is denied one should call the bank's number which is on the back of the card. The business office or the Purchasing Card Office (432-9977) may also be of assistance.

To change an existing card or obtain a new card go to the [Yale Procurement Purchasing Card Website](#) or call the Yale Purchasing Card Office at (203) 432-3227. Refer to Procedure [3215 PR.01 Purchasing Card and EMS](#) for more information about Purchasing Cards.

## Travel Advances

The University issues travel advances only to the traveler(s) who are ineligible for the Yale Purchasing Card or when extended travel or unusual circumstances are involved. For more information regarding extended travel, see Policy [3305 Long Term Activity and Other Expense Advances](#).

When a Purchasing Card is unavailable, the traveler has the option of paying for his/her travel expenses using a personal credit card, check or cash.

## 4 – Supporting Documentation Requirements

Upon returning from a University business trip, the employee or his/her designated preparer must complete and submit an expense report describing the business purpose for travel, and listing all travel-related expenses. Proper documentation and receipts must be attached to the expense report as stated in the Guide [3401 GD.01 Supporting Documentation for Business Expenses](#). Expense reports should be submitted within 10 business days following return from a trip.

Documentations are required as follows:

- **Business Purpose:** A clear and complete business purpose must be documented for each and every trip. The purpose should include the dates of the trip and enough supporting documentation to help the approver, and any subsequent reviewer, validate the business need for the trip. For example, when attending a conference or other event on University business, supporting documentation (such as the conference brochure, itinerary or letter of invite), listing the date(s) and purpose of the event, should be attached to the expense report.
- **Original detailed receipts:** An acceptable receipt is one that is printed on official letterhead or company stationary and that includes line item detail such as the date(s) and description of each expense. All others must be accompanied by additional supporting materials (e.g., a credit card statement showing proof that an expense was paid with a personal credit card).  
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.
- **Purchasing Card transactions:** Some major vendors provide receipt-level detail in an electronic report. These itemized electronic reports (also called “Level 3” detail reports) can take the place of a detailed receipt where applicable in the EMS system. For more details, refer to Procedure [3215 PR.01 Yale Purchasing Card and Expense Management System](#)
- **Air travel:** Include the itinerary listing traveler’s name, routing, class of service and total price.
- **Lodging:** Include the itemized hotel receipt. The per diem rates for lodging cannot be used for reimbursement of a hotel stay.
- **Personal meals:** If per diem is used, no receipts are required. If actual expenses are used, receipts for expenses at \$75 or greater are required. There is no longer a requirement to break out alcohol on business meals. However if the business meal is charged to a federally sponsored award, any alcohol must be identified and charged to the expenditure type 873000. The per diem rates will be used as a guideline to determine the reasonableness of actual meal expenses.
- **Group meals and entertainment:** A detailed list of attendees will be required for meals up to and including 10 people. For a group of more than 10 people, a description of the group will suffice. A detailed receipt (must include date, amount and place) from the restaurant will remain the preferred type of receipt. However if it is not available, a credit card receipt is acceptable. There is no longer a requirement to break out alcohol on business meals. However if the business meal is charged to a federally sponsored award, any alcohol must be identified and charged to the expenditure type 873000.
- Refer to Policy [3302 Business Meals, Entertainment, and Other Social Events](#) for more details.
- **Car rental:** Include the final receipt indicating daily rate, mileage, vehicle size, insurance options, plus any gas receipts.

- **Missing documentation:** Follow the procedure as stated in the Guide [3401 GD.01 Supporting Documentation for Business Expenses](#). If any required receipts are missing, complete Form 3301 FR.05 [Missing Receipt](#).

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## 5 – Telephone and Internet Services

### Yale Telephone Calling Card

Whenever possible, a University cellular phone should be used to make business calls while traveling. When a cell phone is not available, the Telecommunications Department can provide University employees with a telephone calling card to be used in conjunction with University-related business. The calling card enables long-distance telephone charges to be billed directly to a designated department account. The calling card can be used for calls in the United States and overseas. Special international access codes must be used when calling from overseas. The codes may be viewed [here](#). Requests for University [calling cards](#) must be made via a START request.

### Internet Services

Because some hotels may charge exorbitant rates for internet use, travelers should be prudent when utilizing these services. Internet access can be obtained in the following ways:

- travelers using laptop computers should take advantage of wireless options if possible;
- when utilizing internet service from hotels, one can use a Purchasing Card and include the charges with the hotel folio receipt.
- travelers can access Yale PPP account via the laptop to get internet access. The laptops can be preprogrammed using the individuals' Yale Bulldog calling card. To learn more, seek assistance from the [Distributed Support Provider \(DSP\)](#) or call the HelpDesk at 2-9000.

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## 6 – Grant and Contract Requirements

### Determine If Restrictions Apply

Before making any arrangements for travel funded by a grant or contract, consult the terms and conditions of the grant or contract, the approved budget, and determine if any rules or restrictions apply to expenditures for travel. For assistance, contact either one of the following:

- Grant and Contract Administration: (203) 432-2460, 155 Whitney Ave, Room 214, grants@yale.edu
- Grant and Contract Administration-Medical School: 47 College Street, Suite 203, (203)785-4689.

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### “Fly America Act” Requirement for Federal Funds

Federal regulations (i.e. Fly America Act) require that domestic grantees must use U.S. flag air carriers to the maximum extent possible.

Any air transportation to, from, between or within a country other than the U.S. of persons or property paid for from U.S. federal funds must be performed by or under a code-sharing arrangement with a U.S. flag air carrier if service provided by such carrier is available. Tickets or documentation for electronic tickets must identify the US flag air carrier's designator code and flight number.

For purposes of this requirement, the U.S. flag air carrier service is considered available even though a

- comparable or a different kind of service can be provided at less cost by a foreign flag carrier, or
- foreign flag carrier service is preferred or more convenient.

Refer to [Guide 3301 GD.02 Use of U.S. Flag Carriers for Sponsored Foreign Travel](#) for more details.

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### Purchase of Alcohol

Purchase of alcoholic beverages may be charged to a Yale Purchasing Card, but must never be charged to a federal grant or contract, even when the meal is reimbursable.

The cost of alcoholic beverages is reimbursable but must be itemized and charged to a University account that is not funded by a grant or contract, using the appropriate ‘unallowable’ expenditure type. Unallowable refers to the fact that alcohol cannot be charged to a federal grant or contract and cannot be considered a University cost in the computation of the facilities and administrative rate for federal purposes.

## 7 – Quick Chart for Travel Reservations at a Glance

The table below shows the preferred methods of purchase and payment for employees, and non-employees/visitors of the University.

When booking hotels within Connecticut, provide CT Tax Exemption code to avoid paying sales tax.

If however, a personal credit card is used for travel and small expenses, the University **will** reimburse for sales tax paid. The preferred method for paying for such expenses is through a Yale purchasing card whether or not sales tax is charged and paid. See [www.yale.edu/tax/salesanduse](http://www.yale.edu/tax/salesanduse) for guidance on how to avoid paying sales tax.

Type of travel expense	Purchasing method	Payment method
Airline tickets	Use <a href="#">Orbitz for Business</a> full-service travel agency or online booking tool at ( <a href="http://www.orbitzforbusiness.net">www.orbitzforbusiness.net</a> ).	Yale Purchasing card
Train tickets: <ul style="list-style-type: none"> <li>Amtrak</li> <li>Metro North</li> </ul>	<ul style="list-style-type: none"> <li>Call Orbitz 1-877-ORBITZ1 or Worldtek Travel at (203) 4 772-0470</li> <li>Contact Metro North directly. 1-800-METRO-INFO</li> </ul>	Yale Purchasing card
Hotels	Use <a href="#">Orbitz for Business</a> full-service travel agency or <a href="#">online booking tool</a> )	Yale Purchasing card
Car Rentals	Use <a href="#">Orbitz for Business</a> full-service travel agency or <a href="#">online booking tool</a> or call rental agency directly	Yale Purchasing card
Conference registration	Call conference sponsor directly	Yale Purchasing card or <b>Check Request</b> payable to conference sponsor
Local meetings and conference services	Contact <a href="#">Yale Conference Services</a>	Purchase Requisition, Yale Purchasing card or Check Request
Long-distance telephone calls from off-campus locations	University cellular phone when available, or use Yale telephone calling card	Directly billed to department
Visa Services	CIBT 1-800- 577-2428; Yale acct # 40634	Yale Purchasing Card
Other expenses (meals, taxi, parking, etc.)	Traveler purchases directly	Yale Purchasing Card, personal check or cash

For additional information, refer to the following Policy and Procedures:

Policy [3301](#) Travel Policy

Policy [3302](#) Business Meals, Entertainment, and Other Social Events

Procedure [3215 PR.01](#) Yale Purchasing Card and Expense Management System

Procedure [3201 PR.01](#) Purchasing Requisitions (being revised)

Procedure [3401 PR.02](#) Check Request

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