



Title	Travel and Entertainment Policy
Policy Owner	Office of the Associate Vice President for Financial Operations and Controller
Applies to	All University Employees, Students, and Guests, including but not limited to Recruits and Job Candidates
Campus Applicability	All campuses, excluding UConn Health
Effective Date	June 30, 2021
For More Information Contact	Associate Vice President for Financial Operations and Controller
Contact Information	travel@uconn.edu
Official Website	https://travel.uconn.edu

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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, athletic travel, 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 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 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/>).

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. Travel 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 the University Travel Card.

Travelers and Administrators should contact travel@uconn.edu or visit travel.uconn.edu for additional information on what may be reimbursed and how.

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, Provost, Executive Vice President for Administration and Chief Financial Officer, or the Athletic Director or their authorized designees, may review and grant reasonable exceptions. 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 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.

PROCEDURES

Travel and Entertainment procedures are available at: <https://travel.uconn.edu>.

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.

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

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.

1c. OFFICIAL TRAVEL PARTIES – ATHLETIC TRAVEL

An "Official Travel Party" is a group of individuals who are authorized to travel on behalf of the University to athletic events. The Athletic Director is required to approve the "Official Travel Party."

Individuals not included in an "Official Travel Party" require pre-approval by the Athletic Director, or his or her designee, prior to travelling on a team trip.

Once travel is completed, Athletics is required to submit the final travel roster for that trip. The final travel roster must include the names and affiliation of individuals that traveled.

1d. SPOUSAL/PARTNER TRAVEL AND ENTERTAINMENT PARTICIPATION

The travel or entertainment expenses of a spouse, partner, immediate family 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, partner, immediate family or dependent 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 or partner to travel, or provides that his or her spouse or partner 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, immediate family 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, and as such will not be paid or reimbursed using University funds.

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. 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.

Travelers will be reimbursed for travel days 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

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. 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 Travel 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.

2b. AIRPORT PARKING

Travelers should park at the lowest-cost parking lot. Applicable procedures are available at: <https://travel.uconn.edu>.

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.

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 international 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.

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.

2e. UNUSED TICKETS

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

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 Athletic Director or his or her authorized designee.

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.

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.

3c. STATE-OWNED AND STATE-FUNDED VEHICLES

If an employee or department has a state-owned or state-funded (i.e., an automobile allowance/stipend) vehicle, the employee or department should use the vehicle for business travel whenever possible. Charges for tolls and parking are reimbursable.

For state-owned vehicles only: 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>.

For state-funded vehicles (i.e., an automobile allowance/stipend) only: when an employee uses his or her state-funded vehicle for University business, the University will reimburse the employee for their mileage, in accordance with the mileage reimbursement principles contained in this policy, at the IRS's standard moving/medical rate, which is periodically updated and located on the Travel Services website

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 Travel 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.

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 preferred vendors 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.

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.

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.

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.

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.

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 75 miles of both official duty station and personal residence) 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.

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.

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. Travelers may be required by their respective departments or business units to use a particular method. For non-sponsored travel, if meal per diem is requested, the President, Provost, Executive Vice President for Administration and Chief Financial Officer, or Athletic Director (or their designee) has the authority to reduce the meal per diem rate requested. 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, may not exceed the daily meal per diem, 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.). The meal per diem applicable to the first and last day of travel will be 75% of the full day per diem.

Additionally, if a meal was provided, the meal per diem 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 provisions 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.

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.

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.

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.

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. 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.

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 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 1g.

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 the University 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.

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.

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 conferences 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.

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).

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.

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.