



University of New Haven

# Policies and Procedures

**Policy Title:**  
**University Travel Policy**

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**Responsible Office:** Business Office  
**Responsible Official:** Vice President for Finance & Administration

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- **Introduction:**

**Scope**

This Policy and its related procedures are applicable to all University representatives (including employees, students and job applicants) regardless of the source of funds supporting such travel or expenses. For the purpose of this Policy, "University" refers to the University of New Haven and its colleges, schools, divisions, subsidiaries and affiliates. All University trustees, officers, faculty, professional staff members, and students, including student employees or who are otherwise authorized to travel for academic purposes, (e.g., academic seminars) are subject to this Policy. Students traveling under this policy are subject to the Student Code of Conduct Handbook.

**Policy Statement**

It is expected that all University of New Haven employees will exercise appropriate care in incurring Travel Expenses. Because the University is a non-profit, charitable, educational institution, a 501(c)(3) organization as defined by the IRS, expenses should be moderate both in frequency and in amount. Only actual expenses will be reimbursed. Individuals should neither gain nor lose personal funds while conducting business on behalf of the University.

The University of New Haven is committed to supporting the continued professional growth and development of faculty and staff, subject to demonstrated business need and fiscal responsibility considerations. The primary responsibility for the appropriate selection of conferences to attend and other business travel falls to the Traveler, Supervisor, and Expense Approver.

**Reason for the Policy**

The purpose of this Policy is to provide University Travelers with the rules, requirements and restrictions that govern the University's Travel Program while providing a reasonable level of service and comfort at the lowest possible cost to the University.

This Policy will:

- indicate what the approved methods are when procuring business travel arrangements; and
- inform Travelers and Expense Approvers of their roles and responsibilities relative to submitting and approving Business Travel Expenses.

Adherence to this Policy will:

- maximize the Purchasing Department's ability to negotiate discounted rates with preferred suppliers in order to reduce overall cost of travel, by obtaining spend data from the travel management system and discount suppliers for air, rail, hotels, rental vehicles, and other services; and

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- ensure institutional consistency, discipline and accountability over how business travel is conducted by employees of the University of New Haven subject to this Policy; and
  - ensure that the Office of Public Safety is aware of travel plans of all staff and students for adherence to the Cleary Act.

Travelers must be aware of any travel policies or guidelines their department(s) may have in addition to this Policy. Note that such departmental policies or guidelines may be more restrictive than those set forth in this Policy. If there is any disagreement between this Policy and a specific departmental policy, the more restrictive policy will govern a particular situation or issue. In cases where there is a discrepancy between this Policy and the policies provided by a University department, or policies required by an external granting agency (e.g. the federal government) or donor, the more restrictive policies will apply, unless specifically allowed and/or required by the external granting agency or donor.

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- **Policy Sections:**

- **5201.1 Definitions**

- (a) **Authorized Driver.** Someone who successfully completes the University of New Haven's Driver Safety Program. Contact Campus Police for more information.
- (b) **Business Travel Expense.** Reasonable, appropriate, and necessary travel expense incurred while carrying out University business and incurred while on travel from one's office to a business destination and back.
- (c) **Cash Advance.** Funds given to a Traveler prior to the trip for expenses incurred while on University business.
- (d) **Expense Approver.** A Faculty or Professional Staff Member who is designated by a budget owner or financial manager to approve business expenses and who is at a higher level in the organization than the Traveler(s) whose expenses they are charged with approving. A Traveler cannot function as their own Expense Approver, and temporary employees cannot be the sole or final Expense Approver of Business Travel Expenses.
- (e) **Faculty Member.** An individual employed by the University of New Haven in a tenured, tenure-track, non-tenure track or adjunct position who teaches at any college, school, center or institute in the University. A Faculty Member also is deemed to be exempt under the provisions of the Fair Labor Standards Act (FLSA) and/or applicable state law.

- (f) **Legitimate Travel-Related Incidentals.** Small-dollar purchases that occur and are not anticipated but are required for successful completion of the business trip. Examples include: wi-fi, books, office supplies and teaching supplies.
- (g) **PCard.** A University Purchasing Card issued via the Purchasing Department.
- (h) **PCard Reconciliation.** The process whereby the PCard holder organizes the expense backup, assigns the expenses to the proper Banner Index, submits such information to their Supervisor for review and approval and then submitted to the Purchasing Department. Follow guidelines in [University PCard policy](#)
- (i) **Proof of Payment.** Documentation (e.g., receipt, credit card charge slip, hotel folio) that indicates that the individual has settled the billing in-full with the supplier.
- (j) **Staff Member.** An individual employed in any non-faculty category by the University, including an individual who is deemed to be either exempt or non-exempt under the provisions of the Fair Labor Standards Act (FLSA) and/or applicable state law.
- (k) **Supervisor.** The University of New Haven employee to whom the Traveler directly reports.
- (l) **Traveler.** An employee of the University of New Haven, or other authorized individual identified in the Scope section of this Policy, who incurs travel expenses on official University business and is entitled to reimbursement of those expenses.
- (m) **Travel Authorization Form.** The form required to capture important information and the required approvals for a traveler's trip.
- (n) **Travel Portal.** Accessible through myCharger, the travel portal is the repository for the Travel Authorization Form to be submitted for routing of final approval.
- (o) **Expense Report.** The form required for reimbursement requests of personal funds spent on travel expenses.

### **5201.2 Eligible Expenses and Approvals (Travel Authorization Form)**

The University of New Haven will fund authorized Travel Expenses and Legitimate Travel-Related Incidentals incurred while conducting University business. Travelers must upload and process a [Travel Authorization Form](#) and secure all required supervisory approvals four (4) weeks prior to incurring any travel related expenses. No travel may be booked through the Purchasing Department or by PCard, without submission of approved Travel Authorization Form. Travel Authorization forms received after travel are subject to non-reimbursement. Upon return, all Travel Expenses incurred while conducting University- related travel must be reviewed and approved by an Expense Approver. Travelers cannot approve their own expenses. For further information concerning the Travel Authorization Form, please see the [Purchasing Department's web site](#).

### **5201.3 Travel Arrangements**

It is strongly encouraged that all non-local (outside of the New Haven metropolitan area) University travel accommodations be made with the University's Purchasing Department, to facilitate consistent service for Travelers and to assist in the negotiation of discounted rates with preferred suppliers.

Travel arrangements and Business Travel Expenses must be properly authorized, reasonable, and appropriately documented for approval and/or reimbursement. The Purchasing department will require a minimum notice of two weeks prior to departure date to assist with reservations. The University will book standard travel for all approved University students, staff, and faculty associated with approved trips. Any deviation from the standard travel is the responsibility of the traveler and the University will not be involved in booking the alternative plans or responsible for plans that deviate from the standard travel plans.

#### **5201.3.1 Air Travel**

Reimbursement for all air travel will be at the lowest available rate – generally “coach class.” Purchase of airfare with a University PCard is encouraged. Any difference in cost for class upgrade will be at the expense of the Traveler. However, a Traveler may choose to travel “business class” if the continuous flight time in the air (i.e. excluding layovers) (one-way from point of departure to destination – actual time in air) exceeds 6 or more hours. Supervisor approval is required for the purchase of “business class” airfare. (Example – two connecting flights, one 4 hours and one 3 hours would not qualify for business class because the total continuous time in the air is not 6 hours.)

### **5201.3.2 Car Rental**

Only “Authorized Drivers” may rent a vehicle for University business purposes. Please also refer to Policy 5810 “Vehicle Use Policy” for additional guidance. The cost of a car rental is an allowable reimbursable expense provided that such an expense is essential to the business trip. The University will reimburse the Traveler the cost of the vehicle rental, based on the invoice paid to the rental company (IRS mileage does not apply). The Traveler will also be reimbursed for any gasoline purchased separately that is not included in the rental company's invoice provided an original receipt is attached to the Expense Report. Every effort should be made by the Traveler to rent cars from [car rental companies](#) that have discount agreements or special rates with the University. Please contact the Purchasing Department if you need help identifying University of New Haven preferred rental car companies. Any rental of a vehicle for University business within the United States, Canada or Puerto Rico SHOULD NOT

include insurance through vehicle rental agencies. Insurance coverage SHOULD be obtained when renting a vehicle outside the United States, Canada or Puerto Rico. Rental of 15 passenger vans is prohibited due to the possibility of serious accidents and injury to passengers. Please refer to [Policy 5810 “Vehicle Use Policy”](#). Car rentals are to be reserved through companies with whom the University has negotiated rates and insurance documentation on file.

### **5201.3.3 Rail Travel**

Standard coach accommodation will be provided for rail travel less than six hours duration. First class fare will not be allowed unless the continuous rail travel is more than six hours in duration from station to station.

### **5201.3.4 Charter Bus Services**

Charter Bus Companies must be vetted by the Business Office to verify their insurance liability meets the University’s minimum standards. The [bus companies](#) that are approved for University travel are listed on myCharger. (add link)

### **5201.3.5 Other Transportation**

Reasonable use of taxis, buses, airport limousines and similar transport to and from the airport, hotel and/or conference sites will be reimbursed. Utilization of “Black Cars” or a personalized limousine service is prohibited.

### **5201.3.6 Lodging**

Lodging costs for business travel are allowable at the single-room rate, at reasonably priced mid-market hotel or motel accommodations. Any incremental charges for deluxe, double, suite or concierge-level rooms are not allowable. Requests should be made for University of New Haven discounts, educational discounts or other special rates to obtain the best price. The University will not approve or reimburse accommodations at upscale or luxury hotels (rated Four-Star or higher, and comparable internationally). When traveling for a conference, it is appropriate to stay at the hotel hosting the conference, even if the rating exceeds the guidelines; however, the room booked must be at the conference rate. [Local hotels](#) and negotiated rates are listed on myCharger.

All lodging expenses must be substantiated by itemized receipts with information sufficient to verify the amount, date, time, place, and business purpose of each expense. *For example, if the credit card company provides an electronic receipt for an amount billed from a hotel that does not itemize each expense on the bill, the employee must provide paper documentation detailing each expense. Detailed receipts are usually maintained by the vendor for 60 to 90 days after the expense is incurred and can be provided upon request.*

Hotel "no-show" charges, in which a reservation was made and not canceled or changed with the hotel, absent extraordinary circumstances beyond the Traveler's control, and hotel incidentals of a personal nature are not allowable expenses.

### **5201.3.7 Business Meals**

In situations where an individual is conducting business with one or more guests, reasonable meal expenses will be reimbursed. Business meals must be directly related to University business. Participants in the business meal and the purpose of the business meal must be documented on the expense report and on the original receipts. Two receipts are required: itemized receipt and charge slip with gratuity

### **5201.3.8 Local Meals**

Meals consumed within the New Haven Metropolitan area, including towns surrounding any of the University's campuses, and where all of the participants are University members, do not qualify as a reimbursable Business Meal even if "University business matters" were discussed.

Meals consumed by an employee while traveling locally are not allowable business expenses according to the IRS. This does not include meals when an employee is dining or entertaining other individuals for business purposes.

### **5201.3.9 Meals While Traveling**

Meal expenses while traveling on University business are allowable based on original, itemized receipts up to \$64/74 (contingent on destination) per day for domestic travel. This daily allowance includes all meals, beverages, snacks, room service, and reasonable tips, not exceeding 20 percent, and incidentals for an entire day while traveling for University of New Haven business purposes. <https://www.irs.gov/pub/irs-drop/n-23-68.pdf>. Allowable rates for international travel are accessible on the IRS website. [https://aoprals.state.gov/web920/per\\_diem.asp](https://aoprals.state.gov/web920/per_diem.asp)

Receipts are not required to facilitate per diem reimbursement but are required if charged to University pcard.

Additional reimbursement is not appropriate if a meal has been pre-paid as part of a conference or is included in a hotel stay.

Charges or reimbursements for alcoholic beverages are prohibited while traveling on University business.

### **5201.3.10 All Other Travel Expenses**

The University will reimburse an employee or student for other necessary travel expenses (parking, tolls, registration fees, supplies) provided they relate to a bona fide University purpose and are supported by an original receipt. Employees may purchase miscellaneous minor items (books, supplies, instructional materials, etc.) and be reimbursed for their purchases. The University will not reimburse individuals for personal expenses while traveling such as childcare costs, kennel fees for pets, valet, laundry services, snacks, speeding tickets, parking fines, or other similar items or services.

Reimbursable miles: Total miles driven. However, if the trip starts or ends at the employees' residence, their daily commute mileage must be subtracted from the total miles driven. For more information, please refer to the section "Mileage – Personal Use of Automobile" in the University travel and business expense policy.

### **5201.3.11 Spousal, Family and Companion Travel**

Travel expenses for a spouse, domestic partner, families or companions of Travelers will not be reimbursed by the University. Travel for non-University students, staff, or faculty and those not approved as part of the trip will not be accommodated or booked by the University. These travelers will be responsible for booking their own travel.



### **5201.3.12 Distinguished Visitors**

The University recognizes that certain invited guests may require upgraded travel arrangements. These arrangements will be an exception to this Policy and must be approved in advance by the Vice President for Finance and Administration or the Provost. Approved exceptions must be documented in writing on the expense report.

### **5201.3.13 Travel to High-Risk Locations**

Prior to making any travel plans, Travelers going to foreign destinations must check online with the U.S. Department of State to see if the destination location is categorized as “High Risk” or if there are any trip advisories “cautions” for the region. If so, an additional travel approval must be secured from the University’s Department of Public Safety. The following link is provided as a resource for checking the status of foreign destinations; <https://step.state.gov/>

### **5201.3.14 Administrative Burden and Departmental Carve Outs for the Travel Authorization Form**

Certain administrative departments, as specified within the policy section, are exempt from processing and submitting a Travel Authorization Form for University Business Travel due to the administrative burden caused by the high volume of travel required by the nature of their work responsibilities. Employees within the Admissions / Enrollment Management and Development offices are exempt from filing a Travel Authorization Form when traveling, but they are beholden to the other provisions contained within this travel policy. These offices are encouraged to maintain a master travel plan for risk management purposes in the event management needs to identify the travel locations for any University members at any given time.

#### **5201.4 Payment Methods: Preferred and Nonpreferred**

##### ***Preferred: Purchasing Card (PCard)***

Travelers are strongly advised to use a PCard for travel. Travel Expenses paid with a PCard must be reported on PCard Reconciliation report monthly. The Traveler's Expense Approver must approve all Travel Expenses by signing the PCard Reconciliation. Original receipts are required and must be reviewed by the Traveler's Expense Approver prior to approving the Reconciliation. A description of the business purpose of the Travel Expense must be included on the receipts and Reconciliation for each charge.

PCard information, including policy, trainings, and how to apply for a PCard is available on the Purchasing Department's web page.

##### ***Nonpreferred: Personal Credit Card Reimbursements***

While the PCard is the preferred method of payment, Travel Expenses paid with a personal credit card are reimbursable when submitted on a completed Expense Report and accompanied by all receipts/documentation, as detailed below. Travel Expenses paid for with a personal credit card are discouraged. The University reserves the right to refuse and/or delay reimbursement due to non-compliance with this Policy.

##### ***Nonpreferred: Cash Advance Payments***

Some Travelers are permitted to request a Cash Advance for non-local Travel Expenses only. Cash Advances will not be granted for prepaid expenses or expenses that should be paid with a PCard. Cash Advances are the responsibility of the Traveler and Expense Approver and are only available to Faculty and Professional Staff. Cash Advances cannot be issued to students and non-employees. The issuance of a cash advance is authorized on a very limited basis and subject to approval by the Business Office. For further information concerning Cash Advances please see the [Accounts Payable Department's](#) web site.

## **5201.5 Documentation and Reimbursements**

### ***Receipt Documentation***

Receipts documenting Proof of Payment are required for all Travel Expenses, with the exception of business travel mileage reimbursement. Receipts must be legible and itemized. For business travel mileage reimbursement, review the Accounts Payable's web site.

### ***Reimbursement for University of New Haven Travelers***

This Policy qualifies as an "accountable plan" in accordance with [Section 62 of the Internal Revenue Code \[PDF\]](#). Under an accountable plan, Travelers are reimbursed for Travel Expenses incurred, without tax consequences, when the following five conditions are satisfied:

1. **Business Connection:** All charges must be for University related Travel Expenses as defined by this Policy.
2. **Substantiation:** All payments must be substantiated by the Traveler within 60 days after the expense is paid or incurred.  
*Please Note:* In order to comply with [IRS Publication 463](#), under the accountable plan, expenses must be adequately accounted for within a reasonable period of time. A reasonable period of time is defined by the IRS as no more than 60 days after the expenses were paid or incurred. If expense reimbursements are not submitted and approved within the 60-day limit, the amount ultimately paid to the Traveler will be included in the Traveler's annual W-2, or in a similar form issued to non-employee Travelers, as taxable income.
3. **Advance Reasonably Calculated to Cover Expenses:** Any Cash Advance must be "reasonably calculated not to exceed the amount of anticipated expenses" and must be paid within "a reasonable period of time," meaning 15 days, prior to the day the anticipated expense will be incurred.
4. **Specific Identification:** The reimbursement or Cash Advance is identified or paid separately from wages.
5. **Plan Must Require Return of Unspent Advances:** The Traveler is required to return to the employer within 60 days any part of the Cash Advance in excess of substantiated expenses. This requirement is met if the Traveler substantiates the expense within 60 days after it is incurred and returns any unspent funds at that time. If a Traveler does not return an unsubstantiated Cash Advance within 60 days, the Cash Advance is subject to FICA and income tax withholding.

***Non-Employee Expense Reimbursements***

Reimbursement for non-University individuals (Other than spouses/domestic partners, dependents, and family members/friends)

- Requests for reimbursement of Travel Expenses for non-University individuals (guests of the University, candidates for positions, speakers, etc.) are made using a Check Request Form. The Check Request Form should be completed and submitted to the Accounts Payable Department once the proper approvals are secured from the Financial Manager incurring the expenses.

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***This Policy's Contact Person:***

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