



BUSINESS SERVICES

TRAVEL

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PURDUE UNIVERSITY TRAVEL

The University's basic travel regulations are issued by Purdue to remain within federal and state travel regulations. Any reimbursement must be within these rules and regulations.

One of the primary regulations is that all University travel must be pre-approved. An individual is in travel status when traveling on official business for Purdue whether or not expenses will be reimbursed by the University.

The Form 17 (Request for Authority to Travel on University Business) is the University document that communicates to the appropriate individual a staff member's need to be in travel status. Approval of the Form 17 insures that the traveler's supervisor and/or department head approves of the activity, funds are available for reimbursement of expenses, travel is allowable on the funds and traveler is covered under workman compensation.

Spirit of the Purdue University Travel Regulations

All Purdue University travelers seeking reimbursement should incur the lowest reasonable travel expense and should exercise care to avoid impropriety or the appearance of impropriety, i.e., that a business trip has been taken for personal reasons.

If a circumstance arises that is not specifically covered in the travel regulations, either the most conservative course within the "*spirit*" of the University Travel Regulations shall be adopted or consultation for guidance shall be pursued.

APPROVAL PROCESS

The University's basic travel regulations are issued by Purdue to remain within federal and state travel regulations. Any reimbursement must be within these rules and regulations.

Our primary regulation is that all University travel must be pre-approved. Prior travel approval insures the traveler's supervisor and/or department head approves of the activity, funds are available for reimbursement of expenses, travel is allowable on the funds, and traveler is covered under workman's compensation insurance.

The Form 17 (Request for Authority to Travel on University Business) is the University document that communicates the need to be in travel status when traveling outside Indiana. (See In-State Travel Requests in this section for approval requirements when traveling within the State of Indiana.)

An individual is in travel status when traveling on official business for Purdue whether or not expenses will be reimbursed by the University.

Role of the Department Head or Director

The Form 17 is approved at varying administrative levels of the university. The department head/director must approve all travel requests before the request moves to the next step.

The approval level needed is dictated by whether the travel is domestic (excluding travel inside the State of Indiana), foreign, and the type of funds supporting the travel.

The role of these individuals is to determine whether the trip is necessary, if it will truly benefit the University or the work of the individual traveling, and other issues related to the administrators' management of the department.

The following chart illustrates the final academic signature approval for authorization of University Travel Requests:

Authorized Designee	In State Form 17 or Blanket Travel	Domestic Form 17	Foreign Travel Form 17
Directors, Heads of School, Divisions, Depts or Offices	X	X*	
Deans or Vice Presidents		X*	
Executive Vice Presidents or President			X

*When a Dean or Department Head is traveling, the Form 17 will be approved by the next higher administrative level to complete the academic review of the travel.

Role of the Business Office

The business office has a vital role in the approval process. In addition to facilitating the processing of the documents, individuals exercising comptroller signature authority/delegation review the Form 25, Travel Reimbursement Request, signify the following:

- Trip was authorized and approved following proper procedures.
- Travel expenses were allowable, reasonable and allocated to the account by an individual with knowledge of the expense and the account funding the travel expense
- Reimbursement was signed by the traveler
- Expenses on the reimbursement request are in accordance with travel policies and procedures
 - Appropriate documentation is attached to substantiate the reimbursement, including original receipts
 - Appropriate rates are used to calculate mileage and per diem, if applicable
- Reimbursement request is complete and mathematically accurate
- Funds are available in the designated account
- Appropriate object codes are used.

Domestic Travel Requests

Domestic travel includes travel within and between any of the 50 United States and its possessions and territories. Domestic travel also includes travel between the United States and Canada and within Canada, and between the United States and Mexico and within Mexico.

For travelers who live outside the United States and its possessions, domestic travel is travel performed within the travelers' own country.

Domestic Travel Approval Work Flow:

Business Office SPS Funds (Up to Limit) –

1. Approval Signature in Section: Signature of SPS Reviewer –
2. Department for Processing

Business Office SPS Funds (Over Limit) –

1. Approve at Higher Level or School Business Manager
2. Department for Processing

Non-SPS Funds

1. Business Office Initial beside Department Head/Dean
(Business Office initials indicate to the authorizing individual that the form conforms to University travel policies and the funding source is allowable and reasonable.)
2. Department for Processing

In-State Travel Requests

In-State travel covers all travel within the State of Indiana.

The authorization of in-state travel is delegated to the Department Heads.

Each department must establish written policies describing their internal operating procedures for authorizing in-state travel.

- ◆ Academic departments, the Business Office is responsible for assuring the department has a written policy and the department is adhering to that policy.
- ◆ Departments without a Business Office must develop, maintain, and assure adherence to their own in-state travel authorization policies.

A person with Type 1, Comptroller Authority must sign on the Comptroller line of the Form 25 attesting that the travel is complete, all receipts are attached, all signatures are on the forms, and it adheres to the University's travel authorization policies.

Suggested Minimum Departmental Policies for In-State Travel Authorization

Each department must develop an approval policy for In-State travel.

Example:

1. The department could keep a log of staff traveling inside the State of Indiana on business. Anyone who travels in the State of Indiana must be on the list or reimbursement will not be guaranteed.

2. The department may want to develop a list of the position titles of their staff who would be traveling in the State of Indiana on business. Anyone who travels in the State of Indiana must be in a position that is on the approved list or reimbursement will not be guaranteed.

Certainly, policies may more restrictive than the above. These are very basic policies that provide little travel management, but offer some control on staff traveling within the State of Indiana or to contiguous counties of surrounding states.

Blanket Travel

Blanket or frequent travel to contiguous counties in states surrounding Indiana and other special circumstances requiring frequent travel (greater than 12 trips a year to the same location outside the State of Indiana for the same reason) will require prior blanket approval by the department head.

Departments that require blanket travel, as described above, must develop a list of the staff who will be making such frequent trips and identify the counties or states to which they may travel. This list must be approved by the department head or designee and kept on file at the Business Office.

Each department must develop an approval policy for Blanket travel.

Example:

1. The department could keep a log of staff traveling to contiguous counties outside the State of Indiana on business.
2. The department may want to develop a list of the position titles of their staff who would be traveling in to contiguous counties outside the State of Indiana or other special circumstances on business.

Certainly, policies may more restrictive than the above. These are very basic policies that provide little travel management, but offer some control on staff under blanket travel policies.

If blanket travel approval has been granted by the department head, the Blanket Travel box must be checked on the Form 25, Travel Reimbursement Request, when requesting reimbursement. For academic departments, the Business Office signature on the Form 25 attests that the travel adheres to the department's blanket travel policies. Departments without a Business Office must develop, maintain, and assure adherence to their own blanket travel procedures.

Out-of-State Travel

Out-of-state travel is all domestic travel except in-state travel.

Signature authority is delegated to each of the deans/vice presidents to further delegate domestic travel approvals to department heads/directors. The Form 17 must be approved two weeks prior to the trip.

In schools or divisions where this approval authority delegation has been made, the dean/vice president reviews all department head/director travel requests. The department head/director's business office will complete their review prior to forwarding the Form 17 to the dean/vice president.

In schools or divisions where the dean/vice president has not delegated department head/director authority, domestic Form 17's must be routed for the dean/vice president's review and approval.

Foreign Travel Requests

Foreign travel is defined as travel to, between, or within countries other than the United States and its territories and possessions, as well as Canada and Mexico. General Funds may be used for foreign travel with dean approval as long as the travel supports the teaching mission of the University.

All foreign travel will be reimbursed using the federal foreign travel reimbursement rates unless the source of funds requires the travel be reimbursed using state foreign travel reimbursement rates.

Some state sponsored programs may require the use of state foreign travel reimbursement rates. The State of Indiana rates for reimbursement of daily meals and incidental expenses (M & IE) for foreign travel. All foreign travel required to follow state regulations will be reimbursed at the new rates.

JAPAN	KOREA	TAIWAN	CHINA	FRANCE	GREAT BRITAIN	GERMANY	NETHERLANDS	SINGAPORE	All Other Countries
\$90.00	\$85.00	\$85.00	\$65.00	\$65.00	\$65.00	\$65.00	\$65.00	\$65.00	\$50.00

Travel in False Pass, Alaska, St. George, Alaska and Island Kure, Hawaii will be reimbursed using the current Outside Continental United States (OCONUS) rates.

The use of gift funds and general funds no longer require an exception.

- Gift funds may be used for foreign travel as long as the purpose of the trip is consistent with the intentions of the donor.
- General funds may be used for foreign travel when the purpose of the trip relates to the instructional mission of the University.
- When foreign travel relates to research, sponsored program research funds should be used if the trip is allowable and funds are available in the project.

All foreign travel, for employees of state supported institutions of post secondary education, must be approved by the chief executive officer of the University, or his designee in accordance with State of Indiana regulations.

All foreign travel requests must be submitted at least two weeks prior to the departure date to allow time for the proper review of the request. Exception requests should either be explained on the Form 17 in Box 15 Notes & Explanations or attached to the document in memo form.

Request to Travel (Form 17) Approval Work Flow

SPS FUNDS 505-509 AND 515-699

1. Department
2. Dean
3. SPS (Source of Funds)
4. Department for Processing

SPS FUNDS 500-504 (NSF) 510-514 (NIH)

1. Department

2. Dean
3. Department for Processing

NON-SPS FUNDS (Gift, General, Etc)

1. Department
2. Dean
3. Office of the Provost
4. Department for Processing

NON-SPS FUNDS (Gift, General, Etc)

1. Department
2. Dean
3. SPS (Source of Funds –Except NSF & NIH)
4. Office of the Provost
5. Department for Processing

Only an academic designee should authorize/approve a Form 17.

Federal foreign travel reimbursement rates are defined as the per diem allowance determined monthly by the United States Department of State and Government Accounting Office.

When foreign travel relates to research, sponsored program research, funds should be used if the trip is allowable and funds are available in the project. Because all sponsored program funds have been given to the university for a specific activity or purpose, travel requests funded by these accounts receive additional review by the office of (Sponsored Program Services) to ensure proper use, however foreign travel on NSF (500-504) and NIH (510-514) funds no longer require SPS approval. For additional information see prior written approval.

FUND NUMBER	TYPE OF FUNDS	FOREIGN TRAVEL RESTRICTIONS
010 060 070 090	General Funds	Travel must relate to the instructional mission of our academic programs.
012 014 018-019	General Funds	Travel must relate to the designated purpose of the funds.
110 150-160 392 492	Income Producing or Recharge Funds	Travel must be directly related to the activities performed and budgeted within the entity. Each request will be considered on a case-by-case basis. Exception for source of funds will be made by the Executive Vice President & Treasurer or designee.
115-117 120	Continuing Education Funds	Travel must relate to the program that generated the income. Source of funding exception will be made by the Executive Vice president & Treasurer or designee.
		Travel must relate to the program for which the

200-250	Auxiliary And Service Enterprise Funds	budget is intended. Exception for source of funds will be made by the Executive Vice President & Treasurer or designee.
320-328	CES Funds	Allowed as an exception with prior approval of the Director of Cooperative Extension Service (CES) and the Executive Vice President & Treasurer. Must be related to the extension mission of the University.
340-364 370-375 391	Federal Appropriations And Cooperative Agreements	With prior written approval of the funding agency and the Director of Cooperative Extension Service (CES).
390 and 395	CES Memorandums of Agreement And Miscellaneous Agreements	With approval of the CES Director.
41X 440-446 470-479	Federal Appropriations And Cooperative Agreements	With prior written approval of the funding agency and the Director of the Agricultural Experiment Station (AES).
400-416 420 425-433 494	AES Funds	With prior approval of the AES Director and the Executive Vice President & Treasurer. Travel must be related to research in Agriculture as defined by the purpose of these funds.
490 and 495	AES Memorandums of Agreement And Miscellaneous Agreements	With the approval of the AES Director.
500-654 Except 500-504 & 510-514	Sponsored program Funds	Travel must be part of the approved budget or with prior written authorization of the funding agency. Form 17 should be directed to Sponsored Program Services for approval.
670-684	Industrial And Foreign Government Agreements	Allowable unless the award specifically prohibits international travel. Form 17 should be directed to Sponsored Program Services for approval.
690, 5X4, 6X4 (X=0-9)	Fellowship Funds	Travel must be specifically approved by Graduate School. Form 17 (Box 15, Notes & Explanations) should explain how the travel benefits the recipient of the fellowship.
700-750	Gift Funds (702 is <u>not</u> a gift fund)	Travel must be consistent with the purpose of the gift.
702 775 and 776	Other state appropriated funds, such as, State Highway Fund Statewide Technology And	Travel must relate to the purpose for which funding was appropriated by the General Assembly. Exception for source of funds will be made by

	Technological Extension Programs, such as, Technical Assistance Program Funds	the Executive Vice President & Treasurer or designee.
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SPS review on foreign travel has not been delegated.

GUIDELINES FOR PREPARING AND SUBMITTING FORM 17

Item 1: Name of individual requesting permission to travel on University business.

Item 2: Staff ID number (Social Security Number) of the individual requesting permission to travel on University business.

Item 3: Identify the department name and department number to which the individual is assigned.

Item 4 & 5: Departure and return date and hours refer to date and hour of departure from assigned work site. If someone is taking vacation in addition to their trip, please use actual dates they will be leaving (Item 4) and returning (Item 5), including vacation.

Item 6: If there is more than one business destination for any given trip, all locations (cities, states, countries) should be noted here (e.g., West Lafayette to Washington, DC to New York, and return to West Lafayette).

Item 7: Indicate the purpose for which travel authorization is requested. If any specific duty or assignment has been assumed, give definitive information. This may affect whether request for reimbursement of travel expenses can be approved. **DO NOT ABBREVIATE OR USE ACRONYMS.**

Item 8: Indicate here if personal travel will be combined with the business travel. See statement in Box 13 and visit Personal Time with Business Travel for proper procedures when combining business and personal travel.

Item 9: Indicate beginning and ending times of all **official** business connected with this trip.

Item 10: If a vehicle (personal, University or rental) is being used, but the requester on this Form 17 is not the driver, the driver's name should be indicated here.

Item 11: If a vehicle (personal, University or rental) is being used, and the requester on this Form 17 is the driver, the name(s) of other accompanying the driver should be indicated here.

Item 12: List other staff members attending this function.

Item 13: List estimated expenses in as much detail as possible in the appropriate spaces.

Item 13A: Number of days and cost for use of University vehicle should be listed here. See the Transportation Vehicle website for current rates.

Item 13B: Designate here if vehicle used is owned by your department.

Item 13C: Enter estimated costs for use of private vehicle. See Privately Owned Vehicles for detailed information about rates.

Item 13D: Estimate of airfare. Check here if the airfare will be prepaid.

Prepaid airfare and registration expenses must be noted on the Form 17, Box 15 (Notes and Explanations).

If extra days are included on the Form 17 to take advantage of a discount fare, list the price of both flights. A cost comparison including additional lodging, subsistence, parking, etc. Should be included in Box 15.

Most ticketless airfare (Etickets) should not be prepaid using the department purchasing card unless the traveler has the purchasing card because airlines may require the credit card to be presented at the airport.

Item 13E: Enter estimate of rental vehicle expense.

Item 13F: Enter estimate of taxi, shuttle or other local conveyance expense here.

Item 13G: Registrations fees may be prepaid by invoice voucher or department credit card. Check here if prepaid registration.

Membership dues included with a registration fee are not reimbursable.

Item 13H: Lodging should be at the single room rate.

Subsistence is intended to cover meals, tips, telephone calls other than official business, laundry, dry cleaning, pressing of clothes, use of appliances in rooms, in room movies and games, late checkout fees, luggage storage fees, etc.

Subsistence is paid at the federal M & IE rates for all travel except when state rates are required.

If the traveler is not requesting subsistence, lodging, etc., please state on the Form 17 "No lodging reimbursement being requested."

Item 13J: Other Expenses (Example): Additional charges for books, publications, tapes, etc. from conferences or workshops are reimbursable on the Form 25 if the material is kept in the department. A statement to that effect must appear on the travel reimbursement request.

Item 14: Indicate the appropriate source of funding. If funds 500-699 are used, signature of SPS reviewer is required.

Item 15: Enter all notes and explanations here. Examples: Comparisons (See Pages 40-42) when discount airfare is used, but require a Saturday night stay, justification for use of rental car, additional explanation of personal travel combined with business travel, explanation when Form 17 is not completed 2 weeks in advance of the trip dates, prepayments of airfare or registration, variance/revised Form 17, etc.

Item 16: Staff member requesting travel authorization must sign here and indicate position title and date.

Item 17: Recommendations are required at each level up to the final approval level. The final approval level depends on the travel destination.

Form 17 is not required for in-state travel if the department has implemented their own in-state approval policy.

Domestic travel is approved at the Dean or Vice President or their designee.

Foreign travel is approved by the chief executive officer of the University, or his designee in accordance with State of Indiana regulations

Approval of Absence from Campus Duty requests, as defined in the Business Procedure Manual, are not affected by this travel delegation. Leave requests including University authorized travel, such as research leaves in excess of 10 consecutive work days, require approval of the President or the Executive Vice President using the University President's Form 33.

If this is a revision to a previous Form 17, the box at the top right hand corner must be checked and an explanation should be provided in Block 15. Attach the original request to this form. A revised Form 17 must be forwarded through the usual administrative channels. See Form 17 Variances (Page 30) to determine when a revised Form 17 is required.

REBUDGETS

One of the most common adjustments to a research project involves the transferring of funds from one budget category to another to accommodate unanticipated expenditures, for example, travel. This alteration between budget categories does not change the total research dollars for the project and is referred to as a rebudget. It is normally required to be done in advance of the activity; i.e., requires prior approval.

- ◇ Foreign travel not approved in the budget requires prior approval. (Foreign travel is any travel performed outside the United States, its territories and possessions, and considered foreign travel.)

Prior Approval (Institutional)

Some federal agencies (DHHS/PHS/NIH, NSF, USDA, DOE, NASA) permit the grantee institution local authority to rebudget between budget categories when the expenditures are necessary for the successful continuation or completion of the project under the following general conditions and procedures:

- ◇ The rebudgeting of funds must neither impair the investigator's ability to complete the project or activity as approved nor increase the total cost to the grant.
- ◇ The rebudgeted funds may not be used for any purpose disallowed as a condition of the grant.
- ◇ The rebudgeting request must be reviewed for scientific or program propriety in relation to the objectives of the specific project supported by the grant to which the charges will be made.
- ◇ The request for rebudgeting is initiated by the Principal Investigator (PI) in a letter addressed to the Division of Sponsored Programs (DSP).

For projects from these agencies, the rebudgeting process is initiated by the PI via a letter to the director of DSP requesting prior approval for the expenditures. The rebudget letter must be "before-the-fact" and must indicate the following:

- ◇ PI name,
- ◇ Award identifier (i.e., Purdue account number and sponsor name),
- ◇ Exact nature of the expenditures,
- ◇ Budget categories which would be altered,
- ◇ Full explanation of the need for the budget change, including any significant effect on the general scientific direction of the project; and,
- ◇ Travel dates (if appropriate).

The prior approval rebudget must include signatures of the PI, department head, (or director of Institute, Center, or Agricultural Experiment Station), and academic dean. The department head (or director) and dean signatures indicate academic approval of the proposed request.

Prior Approval (By Sponsor)

Other federal agencies (e.g., DOD, DE, EPA, DOT, DOI, AID) as well as state agencies, foundations, and foreign sponsors, have not given Purdue the authority to rebudget between categories and the rebudget request must be submitted to the agency for sponsor approval. With grants or contracts from these sponsors, letters requesting rebudgeting should be addressed to the sponsor's program or grants officer. These letters must be signed by the PI but do not require the department head or dean signatures.

(Please note: A rebudget letter addressed to the sponsor requesting a change in personnel and/or salaries does require the signatures of the department head and academic dean.) However, most sponsors do require the signature of an institutional official before they will act upon such a request, so the letter should be sent to DSP before it leaves the university.

The request will be reviewed fiscally by Sponsored Program Services (formerly OCGBA) and technically by DSP staff, countersigned by a DSP director recommending approval by the agency, and forwarded to the sponsor for their review/approval. The sponsor notifies DSP in writing whether the request was "approved" or "disapproved". DSP sends a copy of the sponsor's correspondence to the PI, BA, and Sponsored Program Services (formerly OCGBA) to inform them of the sponsor's decision.

SUBSISTENCE

The University provides subsistence (also referred to as per diem or M & IE, meals and incidental expenses) to staff and others while they are traveling on official university business.

The subsistence allowance is intended to pay for the following:

Meals	Tips (Restaurants, Taxis, Porters, Etc.)
Telephone Calls (Other than official business)	Pressing or Freshening Clothing
Laundry or Dry Cleaning	Television/Entertainment Equipment
Use of Appliances in Rooms	Locksmith Fees (Example: lock keys in car)
In-Room Movies & Games	Late Check-Out Fees
Additional beds in Room for Non-Employees	Travel Insurance
Safes or Property Insurance	

Subsistence is reimbursed after the trip is complete.

Overnight Travel

Subsistence for Domestic Overnight Travel

Effective for travel on or after February 1, 2003, subsistence for overnight travel on University business will be based on federal per diem rates for the Continental United States (CONUS). This includes travel inside the State of Indiana.

Subsistence is paid each day at the rate where lodging is obtained that evening. If lodging is in a different city than actual business, the subsistence rate will be the city of lodging. On the day travel ends, (return to official station) the rate will be the same as the preceding calendar day.

A) To Find the Domestic Subsistence Rate:

1. Open CONUS site from <http://www.adpc.purdue.edu/Travel/subsist2.htm#domestic>
2. Click on the state where the city is located.
3. Use the rate under Column (b), M & IE Rate.

NOTE: Rates for Alaska, Hawaii, or US Possessions: <http://www.state.gov/m/a/als/prdm/>
Click on appropriate year and time period of travel.
Scroll to the bottom of the page for Maximum Travel Per Diem Allowances for Foreign Areas:

Canada and Mexico are considered domestic travel, but M & IE rates are found under foreign rates: <http://www.state.gov/m/a/als/prdm/>
Click on appropriate year and time period of travel.
Scroll down to Canada or Mexico.

B) What if the City is not listed on the CONUS Website

To Find the County Subsistence Rate:

1. Open National Association of Counties website at http://www.naco.org/counties/queries/city_srch.cfm
2. Use drop down box to select appropriate state, Click on 'Submit State'
3. Click on first bulleted point: 'View All Cities for Selected State'
4. Highlight correct letter, then click on 'Select'.
5. Scroll down to business location city to find county name.
6. If county is listed in the CONUS list, use the applicable M & IE rate.

C) What if neither the City nor County are listed on the CONUS list?

Cities not listed or located in listed counties have a Standard CONUS M&IE rate of \$31 for 10/1/03 – 09/30/04.

Subsistence for Travel On or After 2/1/2003

FULL DAY	PARTIAL DAY
100% OF M & IE Rate	75% of M & IE Rate
Leave At or Before 8 AM or Return At or After 5 PM	Leave After 8 AM or Return Before 5 PM

Subsistence for Travel Before 2/1/2003

SUBSISTENCE	IN-STATE	OUT-OF-STATE
12 Midnight to 6 a.m.	\$6.50	\$8.00
6 a.m. to 12 Noon	\$6.50	\$8.00
12 Noon to 6 p.m.	\$6.50	\$8.00
6 p.m. to 12 Midnight	\$6.50	\$8.00

Saturday, Sunday and holiday lodging and subsistence will be allowed when such cost is less than the transportation cost to and from the assignment and official station, or when such expenses are necessary for the proper transaction of business.

Foreign Travel Guidelines

Meals & Incidental Expenses (M & IE) (also known as Per Diem, or Subsistence) is defined as the allowance for lodging, meals, and related incidentals. Meals & Incidental Expenses (M&IE) will be paid at the foreign destination rate (location of lodging) from the time an individual leaves their official station until they arrive back at their official station.

Stops involving business within the fifty United States on the way to and from a foreign destination will be paid at the domestic subsistence rate for the time at/between the domestic stop and their official station.

Layovers to change planes will continue to be paid at the foreign destination M&IE rate.

M&IE will be paid each day at the destination rate where lodging is obtained that evening.

On the day travel ends, (return to official station) the M&IE rate will be the same as the preceding calendar day.

A rest stop (rest period) upon arrival at the business site is allowable when the origin and/or destination are outside the United States and the scheduled flight time, including stopovers and change of planes, is in excess of 14 hours. A rest stop (rest period) will not be approved if the required airline stopover en route totals more than 8 hours. See section on Subsistence for M & IE rates.

The M&IE rate for approved rest stops will be the rest stop rate if lodging is obtained at the rest stop. Otherwise the M&IE will be paid at the foreign destination rate of the foreign location to be visited.

Use the Federal Foreign Per Diem table for meals and incidental expense (M&IE) rates.

<http://www.adpc.purdue.edu/Travel/subsist2.htm#fedpdiem>

Lodging over the maximum by location will continue to be approved only if the hotel whose rate was over the maximum is the official place of business. (i.e., site of conference, etc.) Limit is 300% of the maximum federal lodging allowance.

Charges for transfer storage and checking of baggage will be reimbursed if receipts are submitted.

Charges for travelers checks will be reimbursed if receipts are submitted.

Foreign Federal Per Diems / Meal Deductions

For business travel on or after February 1, 2003:

<http://www.adpc.purdue.edu/Travel/subsistmealsdeduction.htm>

MEAL PROVIDED	PERCENTAGE
Breakfast	25% of Full M & IE Rate
Lunch	25% of Full M & IE Rate
Dinner	50% of Full M & IE Rate

For business travel prior to February 1, 2003:

The table listing deductions for meals included in registration fees, lodging rates, or provided by someone else, can be found at:

<http://www.adpc.purdue.edu/Travel/subsistmealsdeduction.htm#oldrates>

The source of this table is Appendix B to Chapter 301 - Allocation of M&IE Rates to be Used in Making Deductions from the M&IE Allowance, from the Federal Travel Regulations.

Meals & Incidental Expense rates for localities in non-foreign areas (prescribed in Civilian Personnel Per Diem Bulletins published periodically in the Federal Register by the Secretary of Defense) and for localities in foreign area (established by the Secretary of State in Section 925, a per diem supplement to the Standardized Regulations (Government Civilians, Foreign Areas)) shall be allocated as shown in this table (S 301-7.12(a)(2)(ii)) when making deductions from non-foreign or foreign area per diem rates.

Example: A University employee is traveling in Paris, France. The current Federal Per Diem is \$144 for lodging and \$98 for Meals and Incidental Expenses making the total Federal Per Diem a maximum of \$242. The registration indicated that during the trip all meals would be provided. When the employee files the Form 25 for reimbursement only the incidental amount (M & IE) of \$19 (\$98 less \$15-breakfast, \$25-lunch, \$39-dinner) plus \$144 for lodging would be claimed as lodging and subsistence.

Same Day Travel

For travel that begins and ends in the same day (regardless of travel destination) on a normally scheduled workday. The traveler does not purchase lodging and returns to official station or home. Subsistence may be claimed as follows:

SUBSISTENCE AMOUNT	\$15.00
In Travel Status 8 Hours or More	X

The maximum subsistence allowable for travel in the same day is \$15.00.

Any required same day business travel on Saturdays, Sundays, Holidays, will be reimbursed if travel is 8 hours or more. Part-time employees or employees interrupting vacation leave for a morning or evening meeting would not qualify for meal allowances if travel is less than 8 hours.

If Registration Fee for same day travel includes meals, or the traveler is furnished meals gratis, the standard deduction for these meals should be reflected in the reimbursement request.

Examples of Same Day Travel

Example #1: Travel Only (Lunch Provided)

The traveler is attending a seminar in Chicago, Illinois. The registration fee included a lunch. The traveler leaves at 5 AM, travels to Chicago, and returns at 7:30 PM. The traveler was in travel status for more than 8 hours, therefore is entitled to \$15.00 same day subsistence. Reimbursement is \$15.00 less \$3.75 (25% of \$15) after completing the Form 25, Request for Travel Reimbursement.

Example #2: Combination Work and Travel

The traveler is attending a seminar in Indianapolis. The traveler comes to work at 8 AM, then leaves for a meeting in Indianapolis at Noon, then returns home or official station at 5 PM. The traveler was in work and travel status for more than 8 hours, therefore is entitled to \$15.00 same day subsistence after completing the Form 25, Request for Travel Reimbursement.

Example #3: No Reimbursement

The traveler is attending a seminar in Indianapolis. The traveler leaves West Lafayette at 9 AM and travels to Indianapolis, then returns by 4:00 PM. The traveler was not in combination travel and work status for more than 8 hours, therefore is not entitled to \$15.00 same day subsistence.

TRANSPORTATION

Personal Owned Vehicle

Mileage Reimbursements

Travel in privately owned vehicles is reimbursed according to miles traveled. The amount paid for mileage is intended to compensate the traveler for wear and tear, gas, and insurance coverage on their personal vehicle.

Mileage to common destinations, using the shortest route usually traveled, has been computed by Disbursements using the official state highway map and road atlas (see the Mileage Information Guide at <http://www.adpc.purdue.edu/Travel/milechrt.htm>). If the city is not listed on the mileage chart, travelers may use mapping sites such as www.mapquest.com or www.mapsonus.com. Please attach a printout showing the miles if websites are used to compute mileage.

Reimbursement for miles traveled in excess of 110% of the mileage will require additional explanation (i.e., addresses visited, detours, etc.).

Travel expense reimbursement is limited to the lesser of expenses incurred from the departure point or from the "official station". The official station is defined as the location of the permanent office.

If the traveler is departing from some place other than their permanent office, a comparison must be shown to indicate that expenses do not exceed what would have been allowed had they left from their "official station".

On-campus mileage is not reimbursable.

Mileage from campus to local Purdue locations and other local sites will be reimbursed at the request of the employee and department involved.

Travel on or after January 1, 2005

	Mileage	Mileage Rate
***See Drive Vs Fly	***No Limit	\$.40 Per Mile
State of Indiana Contracts and Grants		
In-State	All Miles	\$.36 Per Mile
Out-Of-State	0-500 Miles	\$.36 Per Mile
	Over 500 Miles	\$.17 Per Mile

*****Drive Vs Fly:** Persons who choose to drive rather than fly long distances are in travel status for a total of two full driving days for subsistence and lodging (1 day there, 1 day back). Mileage reimbursement will not exceed the best available airfare **PRIOR** to travel. The traveler must acquire a written quote from a travel agency or printout from an online vendor, i.e., Expedia, Travelocity or directly from an airline website **PRIOR** to travel.

Travel on or after January 15, 2004 through December 31, 2004

	Mileage	Mileage Rate
***See Drive Vs Fly	***No Limit	\$.37 Per Mile
State of Indiana Contracts and Grants		
In-State	All Miles	\$.36 Per Mile
Out-Of-State	0-500 Miles	\$.36 Per Mile
	Over 500 Miles	\$.17 Per Mile

*****Drive Vs Fly:** Persons who choose to drive rather than fly long distances are in travel status for a total of two full driving days for subsistence and lodging (1 day there, 1 day back). Mileage reimbursement will not exceed the best available airfare **PRIOR** to travel. The traveler must acquire a written quote from a travel agency or printout from an online vendor, i.e., Expedia, Travelocity or directly from an airline website **PRIOR** to travel.

Travel on February 1, 2003 through January 14, 2004

	Mileage	Mileage Rate
***See Drive Vs Fly	***No Limit	\$.36 Per Mile
State of Indiana Contracts and Grants		
In-State	All Miles	\$.28 Per Mile
Out-Of-State	0-500 Miles	\$.28 Per Mile
	Over 500 Miles	\$.14 Per Mile

Travel on January 11, 2002 through January 31, 2003

MILEAGE	All Miles	0 - 500	501 - 3,000	Over 3,000 (With Prior Approval of Asst Comptroller)
In-State	\$.36			
Out-Of-State		\$.36	\$.18	\$.10

- Out-of-state mileage in excess of 3,000 miles must be cost-justified and approved as an exception from the Disbursements Manager prior to travel.
- If approved, mileage in excess of 3,000 miles will be reimbursed at a rate of \$.10 per mile.

Travel on July 16, 2001 through January 10, 2002

MILEAGE	All Miles	0 - 500	501 - 3,000	Over 3,000 (With Prior Approval of Asst Comptroller)
In-State	\$.34			
Out-Of-State		\$.34	\$.17	\$.09

- Out-of-state mileage in excess of 3,000 miles must be cost-justified and approved as an exception from the Disbursements Manager prior to travel.
- If approved, mileage in excess of 3,000 miles will be reimbursed at a rate of \$.09 per mile.

Travel on August 1, 2000 through July 15, 2001

MILEAGE	All Miles	0 - 500	501 - 3,000	Over 3,000 (With Prior Approval of Asst Comptroller)
In-State	\$.32			
Out-Of-State		\$.32	\$.16	\$.08

- Out-of-state mileage in excess of 3,000 miles must be cost-justified and approved as an exception from the Disbursements Manager prior to travel.
- If approved, mileage in excess of 3,000 miles will be reimbursed at a rate of \$.08 per mile.

Mileage for traveling between the place of lodging and dining or any personal mileage, i.e., shopping, sightseeing, visiting friends, is NOT reimbursable. A second round trip is permitted to transportation terminals when such costs are lower than alternatives such as parking or renting cars.

Mileage reimbursement may be limited to less than full reimbursement by deans and/or department heads.

When two or more staff travel together in a personal vehicle, reimbursement cannot exceed airfare and subsistence for time in route by plane. When two or more staff members travel the same general route in automobiles, the department head, having first hand knowledge of all pertinent facts, should determine if travel together is appropriate. If employees are approved by the department head to travel separately, each employee is eligible for full mileage reimbursement.

Rental Vehicles

1. Most major rental car companies give Purdue employees a discount on normal charges. Currently Purdue has special contracts with National and Avis for preferred rates and special shuttle arrangements between major airports and Big 10 cities. However, as with any travel arrangements, the traveler should check with several sources for the best rate available at the time of the trip. Each company provides a unique identification number to be referenced when making reservations.
2. Collision (CDW), Personal Accident Insurance (PAI), Liability (LIS) and Personal Effects (PEC) coverage is not reimbursable. Purdue is self insured for damage exposure for vehicles used by university staff.
3. Parking and gasoline charges are reimbursed when receipts are furnished.
4. The itemized receipt obtained from the rental agency must accompany the travel expense voucher.
5. If the rental vehicle was used for personal business combined with University business, only the amount directly related to University business can be reimbursed. Even if the total discounted rental rate is less than the amount for days of business use.

6. If the rental vehicle was used for personal business, the bill must be divided and a statement outlining the number of days for personal use shown on the Form 25, Request for Reimbursement.

Insurance Coverage: Purdue insures, on a worldwide basis, the collision damage exposure for vehicles rented by staff traveling on university business. Therefore, the waiver offered by the rental company should not be purchased.

Accidents should be reported to the police immediately. Obtain the name and departmental affiliation of the investigating officer. Exchange information with the other driver(s) involved including: names, addresses, phone numbers and descriptions of vehicles. Report this information immediately to Risk Management.

Advise the rental car company that Purdue University self-insures rental vehicle collision damage. A wallet card is available from Risk Management with the insurance information on it. The rental agency may demand that you provide to them a credit card to which the damage can be billed. The repair expense will be reimbursed to you by Risk Management, upon receipt of copies of the Form 17, the rental agreement and your credit card statement.

ALLOWABLE SIZE OF RENTED VEHICLE

In keeping with the 'Spirit of Purdue Travel Policy' the traveler should rent intermediate/medium size vehicle. See questions below for special circumstances. Is the additional expense advantageous to the mission of the university or simply an extra perk (bonus) for the traveler?

QUESTION: Does a traveler need a higher priced convertible or full-sized rental when an intermediate car will get the traveler to where they need to be for business, with what they need to complete the business, and in a timely manner?

ANSWER: Yes, if the traveler is driving someone that represents the university in a parade. Example: Rose Bowl Parade.

QUESTION: Does a traveler need a higher priced SUV to travel when the weather is nice and they're just traveling on normal roads?

ANSWER: No unless they're in an area with inclement weather (example mountains covered with snow in winter) or if their business takes the traveler into areas that a 4-wheel drive vehicle is needed to accomplish the mission of the trip.

QUESTION: Does a traveler need a van or larger vehicle to travel normal roads?

ANSWER: No unless the traveler is picking up additional passengers (such as donors) and needs the room or if the traveler has equipment that needs transported to accomplish the mission of the trip.

Commercial Air

Airfare is reimbursed directly to the traveler at the economy or coach fare only. First or Business class airfares will be allowed only on an exception basis and **Must be Approved Prior To Travel** by Disbursements. The exception request with the Assistant Comptroller's approval must be submitted with the Form 25, Travel Reimbursement Request.

Airfare Receipts:

An airfare receipt must include the travelers name, dates of travel, destination(s), name of air carrier, fare/class of travel, and cost of flight.

- The passenger coupon or detailed itinerary is required as proof of payment for air travel if a paper ticket is purchased from a travel agency.
 - *Purdue encourages our travelers to request a copy of the passenger coupon when purchasing e-tickets from a travel agency.*
- Boarding passes can be used as backup information, but not for actual receipt information.
- If a ticket is not issued for the flight, the proper documentation consists of the traveler's itinerary. If the itinerary doesn't provide payment information, the traveler should also attach a receipt from the airline, charge card receipt and/or front and back copy of canceled check.
- If the traveler uses an internet booking tool, such as Travelocity, Expedia, etc., be sure to print out the receipt (*not just the quote*). Some proof of payment of the amount must be listed on the itinerary (i.e., receipt from the airline, charge card receipt or canceled check.)
- If the employee is traveling on a PRF Foreign Travel Grant, a copy of the ticket and any other reimbursed receipts must be attached to the reimbursement voucher along with a copy of the letter awarding the grant. These copies should be clearly marked that the expenses were already reimbursed by PRF.

Discount Fares Requiring Additional Day's Stay

Discount air travel arrangements that require an additional night(s) lodging and/or subsistence are reimbursable. The additional lodging and subsistence must not exceed regular coach fare at the time the trip is taken. The calculation showing the savings must appear in box 15 on the Form 17. The calculation should include the coach fare, the discounted fare, the amount of additional lodging and subsistence, and any other expenses incurred on behalf of the extra day's stay.

Pre-Paying Airfare on Department Procurement Card

Airfare may be charged on the department purchasing card (P-Card) or reimbursed directly to the traveler.

The process assumes the traveler is responsible for making the specific travel arrangements and communicating the necessary details to the Business Office.

Once the traveler has completed the Form 17, the payment method should be discussed with the Business Office. The payment method may be entered on the Form 17 any time the employee and the Business Office come to agreement. Any expense that will be charged via the University purchasing card must be clearly identified on the Form 17 in Section 15 Notes and Explanations, indicating the method of payment.

Once the travel is approved at the department level and the proper signatures are affixed to the Form 17, the Business Office can proceed with the appropriate payment method using the following procedures.

The procedure changes slightly depending on whether the Business Office or the Traveler holds the Purchasing Card.

Procedures If Traveler Has the Purchasing Card:

1. The employee will complete flight arrangements, except for payment details. The employee should also confirm that the fare is a coach rate at this time. The payment arrangements and confirmation of coach fare should be noted on the Business Office copy of the Form 17 along with the assigned purchasing card number.
2. The original Form 17 will be retained for normal travel processes and filed waiting for reimbursement.
3. A copy of the Form 17 should be filed with the purchasing card documentation awaiting the purchasing card monthly reconciliation.
4. When the purchasing card transaction listing is received, the business office will verify that the charges are correct and complete the purchasing card reconciliation process.
5. When the traveler submits the Form 25 for reimbursement, the business office will verify that the original copy of the passenger's airline ticket is attached and the prepaid airfare is accounted for properly. They will then complete the review of the Form 25, sign, and submit it for payment with the original Form 17.
6. The Business Office will attach copies of the Form 25 and airline ticket to the Form 17 maintained as part of the purchasing card backup documentation.
7. Other copies of the Form 17, Form 25, and receipts are filed per normal department procedure.
8. The business office will review pending Form 17s bi-monthly. If the travel dates have passed, the business office will contact the employee to follow-up on reimbursement of expenses. If the employee has not filed for reimbursement within six months of the trip, or if the trip did not occur, the employee will be expected to reimburse the University for the charged expenses.

Procedures If Business Office Has the Procurement Card:

1. The Business Office will notify the employee when the travel is approved at the department level.
2. The employee will complete flight arrangements, except for payment details, and obtain a confirmation number from the travel agent.
3. The employee will communicate the airline or travel agency number to be contacted regarding payment details to the Business Office together with the confirmation number.
4. The Business Office will call the travel agent or airline with the confirmation number provided by the employee and charge the airfare using the purchasing card approved for travel expenses. They should also confirm that the fare is a coach rate at this time. The payment arrangements and confirmation of coach fare should be noted on the Business Office copy of the Form 17 with the assigned purchasing card tracking number.
5. The original Form 17 will be retained for normal travel processes and filed awaiting reimbursement.
6. A copy of the Form 17 should be filed with the purchasing card documentation awaiting the purchasing card monthly reconciliation.
7. When the purchasing card transaction listing is received, the business office will verify that the charges are correct and complete the purchasing card reconciliation process.
8. When the traveler submits the Form 25 for reimbursement, the Business Office will verify that the original copy of the passenger's airline ticket is attached and the prepaid airfare is accounted for properly. They will then complete the review of the Form 25, then sign and submit it for payment with the original Form 17.
9. The Business Office will attach copies of the Form 25 and airline ticket to the Form 17 maintained as part of the purchasing card backup documentation.
10. Other copies of the Form 17, Form 25, and receipts are filed per normal department procedure.
11. The Business Office will review pending Form 17s bi-monthly. If the travel dates have passed, the Business Office will contact the employee to follow-up on reimbursement of expenses. If the employee has not filed for reimbursement within six months of the trip, the Business Office will contact the employee regarding reimbursement of the charged airfare.

Canceled Trips will be handled under normal Travel Policy guidelines.

For Sponsored Projects that have expired, the Business Office should check the pending file for outstanding travel on the expired accounts and request Form 25s or repayment of expense prior to the six month period stated above consistent with normal account management time frames.

CAUTION: When purchasing Electronic Tickets (E-Tickets), the traveler may have to show the actual charge card at the ticket counter before boarding. Therefore, **extreme caution** must be used when purchasing Electronic Tickets using the P-Card (see "Procedures if Business Office Has the Purchasing Card' instructions).

E-Tickets or Ticketless Travel

The traveler receives an itinerary and a receipt showing a confirmation number. Upon arrival at the airport, the traveler shows the charge card used to purchase the ticket or a photo I.D. card at the ticket counter, along with the confirmation number, and receives a boarding pass with a seat assignment.

If ticket is purchased from a website, i.e., Expedia or Travelocity, be sure to printout the receipt verifying the purchase. A printout of the 'quote' is not acceptable documentation for reimbursement.

Compensation Received From Airlines

Intermittently we have travelers that volunteer to take another flight and are compensated by the airline with a free ticket(s).

Compensation received by a traveler from an airline when the traveler voluntarily vacates a seat on a scheduled flight may be retained for personal use by the traveler if:

1. Voluntarily vacating the seat will not interfere with performing official duties; and
2. Additional travel expenses, incurred as a result of vacating seat are borne by the traveler and are not reimbursable; and
3. Annual vacation leave is charged for additional hours if volunteering delays travel during duty hours.

U. S. Flag Carrier

The Federal Aviation Act of 1958 as amended by the International Air Transportation Fair Competitive Practices Act of 1974 required all federal agencies and government contractors, subcontractors and grantees to use U.S. Flag Carriers for air transportation of personnel both domestic and foreign travel. The Act further provides that in the absence of satisfactory proof of the necessity therefore, any expenditure of federally appropriated funds for foreign travel on other than U.S. Flag Carrier shall not be allowable. See questions and answers below taken from the Federal Travel Regulations.

What is U.S. Flag Air Carrier Service?

Service provided on an air carrier that holds a certificate under 49 U.S.C. 41102.

U.S. flag air carrier service also includes service provided under a code share agreement with a foreign air carrier in accordance with Title 14, Code of Federal Regulations, when the ticket (or electronic ticket documentation) identifies the U.S. flag carrier's designator code and flight number.

When Must Traveler Use U.S. Flag Carrier Service?

The traveler is required by 49 U.S.C. 40118 (Fly America Act), to use U.S. flag carrier service for all air travel funded by federal funds unless:

- a) Use of a foreign air carrier is determined to be a 'matter of necessity'
 1. When use of a foreign air carrier is necessary for medical reasons, including reducing the number of connections and possible delays in transporting persons in need of medical treatment;
 2. When use of a foreign air carrier is required to avoid an unreasonable risk to traveler's safety;
- b) When a ticket in authorized class of service (coach/economy) on a U.S. flag carrier is unavailable, and a seat is available in that class of service on a foreign air carrier.
- c) No U.S. flag air carrier provides service on a particular leg of the route, in which case a foreign air carrier service may be used, but only to or from the nearest interchange point on a usually traveled route to connect with a U.S. flag air carrier;
- d) A U.S. flag air carrier involuntarily reroutes your travel on a foreign air carrier;
- e) Service on a foreign air carrier would be 3 hours or less, and use of a U.S. flag air carrier would at least be double time;
- f) When costs of transportation are reimbursed in full by a third party, such as a foreign government or international agency.

What Exceptions to the Fly America Act Requirements Apply When Traveling Between U.S. and Another Country?

Unless such use would extend travel time, including delay at origin, by 24 hours or more; U.S. flag air carrier on every portion of the route where it provides service unless, when compared to using a foreign air carrier such use would:

1. Extends travel time by at least 6 hours or more
2. Increase number of aircraft changes made outside the U.S. by 2 or more
3. Requires a connecting time of 4 hours or more at a foreign interchange point.

What Exceptions Apply When Travel is Solely Outside the U.S. and a U.S. Flag Carrier Provides Service Between Origin and Destination?

A U.S. flag carrier must be used for such travel, unless, when compared to using a foreign air carrier, such use would:

1. Increase number of aircraft changes made outside the U.S. by 2 or more
2. Extends travel time by at least 6 hours or more
3. Requires a connecting time of 4 hours or more at a foreign interchange point.

Is Travel by a Foreign Air Carrier Permitted if the Cost of Ticket is Less, More Convenient, or Traveler Prefers Foreign Air Carrier?

No. Foreign air carrier service may not be used solely based on the cost of a ticket, traveler convenience or preference.

Must the Traveler Provide Any Special Certification of Documents if a Foreign Air Carrier is Used?

Yes. A certification includes:

- ◆ Traveler's name
- ◆ Dates traveled
- ◆ Origin and destinations of travel
- ◆ Detailed itinerary of travel

- ◆ Name of air carrier and flight number for each leg of trip, and a
- ◆ Statement explaining how exception was met

What is the Liability if Traveler Improperly Uses a Foreign Air Carrier?

Reimbursement cannot be made for any transportation cost for which traveler improperly uses foreign air carrier service. If foreign air carrier is improperly used for any part of or all of the trip, the cost on the foreign air carrier is not reimbursable.

Leased or Private Aircraft

Leased aircraft:

The actual lease cost for aircraft leased from commercial leasing companies or the Purdue Aero Club is reimbursable up to the round trip, commercial coach airfare rate for the same trip for the same number of official passengers. A valid invoice must be provided.

Private Aircraft:

When an employee and others rendering service to the University use a privately owned aircraft in the conduct of official business, the employee owning the aircraft is entitled to reimbursement of a maximum of 45 cents a mile up to the lowest available commercial coach airfare for one individual for the same flight to the same destination.

A written statement from a travel agent must be attached to the request for travel reimbursement. The travel agent statement must show the lowest available commercial coach airfare for one individual for the same flight to the same destination.

The air mileage between the origin and the destination airports, as determined from airways charts issued by the National Oceanic and Atmospheric Administration, Department of Commerce, shall be reported on the reimbursement request and shall be used in computing payment.

If a detour was necessary because of adverse weather, mechanical difficulty, or other unusual conditions, the additional air mileage may be included in the mileage reported on the reimbursement request and, if included, it must be explained.

A Purdue staff member operating his/her owned aircraft on approved University business is covered under Worker's Compensation in the event illness or injury occurs while in official travel status. However, the University provides no liability coverage to third parties for bodily injury or property damage which results from the operation of such aircraft. "Owned aircraft" means wholly or partially owned by the staff member or registered in the name of the staff member or any member of his or her household.

A list of air mileage from Indianapolis to every airport in the continental United States is kept in Disbursements by the Travel Clerks.

Chartered Aircraft

Chartered aircraft may be used when traveling on university business if it is the least expensive method of transportation. To charter an aircraft contact the Purchasing department.

Bus

Travel by bus is a reimbursable expense provided acceptable receipts are attached to the Form 25, Travel Reimbursement Request.

Train

Travel by train is a reimbursable expense provided acceptable receipts are attached to the Form 25, Travel Reimbursement Request.

University travelers must use coach-class accommodations for all train travel. Coach-class is defined as “The basic class of accommodations offered by a rail carrier to passengers that includes a level of service available to all passengers regardless of fare paid. Coach-class includes reserved coach accommodations as well as slumber coach accommodations when overnight train travel is involved.”

AN IMPORTANT POINT:

Complimentary meals included in the fare must be deducted from per diem.

A foreign train, bus or other service carrier may be used in lieu of, or as a supplement to air travel at the lowest rate by the transportation facility used. However, if such travel could have been performed by air, the allowance should not exceed that of coach air accommodations.

Taxis, Limousines, and Other Local Conveyances

Taxis, limousines, and other local conveyances are reimbursed without receipts provided they are reasonable. Such transportation must be limited to travel between official stations and transportation terminal, and/or places of lodging and places of University business.

The amount of the fares must be itemized, individually showing starting and ending locations of each trip. Taxi fares may be reimbursed when a University, rental or personal vehicle has been the prime mode of transportation, however, a written explanation is required.

Tips will be deducted if the receipt attached to the Form 25 itemizes the tip and cab fare.

LODGING

Lodging expense will be reimbursed based on the location of travel, upon presentation of an original receipt from a commercial lodging establishment. The receipt should show dates of occupancy and the name and address of the place of lodging. A person may not claim reimbursement for lodging when the lodging was provided by a person who is not in the business of providing lodging.

Staff members in official travel status shall be allowed reimbursement for actual lodging charges not to exceed the single person occupancy rate, sales tax and an instrument charge for a telephone when it is listed separately on the receipt.

Extra charges such as tips, room service, movies, phone calls, laundry services, meals, safes, property insurance, or miscellaneous charges will not be paid as lodging.

Additional fees charged for late checkout are not reimbursable. Normally lodging establishments have facilities to store luggage at no additional cost after checkout.

Actual lodging costs at the single room rate will be reimbursed. However, to minimize costs, staff members should use the most economical lodging suitable to the circumstances of travel. Room rates requested for reimbursement will be reviewed and those thought to be excessive will require justification.

Domestic Lodging

Lodging expenses are reimbursable if the business trip is overnight or long enough that the traveler needs to stop for sleep or rest to properly perform their business duties.

An original receipt is always required to be reimbursed for lodging.

Foreign Lodging

Lodging during foreign travel will be reimbursed at the federal foreign travel reimbursement rates. These reimbursement rates are furnished by the U. S. Department of State and are published in "Maximum Travel Per Diem Allowances for Foreign Areas Section 925, A Supplement to the Standardized Regulations". The publication will continue to be available via subscription from the Superintendent of Documents, U. S. Government Printing Office, Washington, D.C. 20402-9371.

A rest stop (rest period) upon arrival at the business site is allowable when the origin and/or destination are outside the United States and the scheduled flight time, including stopovers and change of planes, is in excess of 14 hours. A rest stop (rest period) will not be approved if the required airline stopover en route totals more than 8 hours. See below for M & IE rates.

If the travel is required to be reimbursed under State policy, follow the lodging regulations for domestic travel. Regardless of source of funds, the cost of the lodging must be converted to US dollars with the calculation shown on the receipt itself.

For travel in foreign areas involving special or unusual circumstances, the reimbursement of actual and necessary itemized per diem expenses shall not exceed 300% of the applicable maximum foreign travel per diem allowance. A full explanation of the special or unusual circumstances must be indicated on the Form 17 and approved prior to the trip.

Sharing Rooms

Faculty/staff members may be reimbursed when paying for expenses on behalf of other employees, **IF**

- Both employees are conducting official business for the University, **and**
- The employee bearing the ORIGINAL receipt claims reimbursement, **and**
- The accounts are distributed on the reimbursement claim, Form 25, (in the case of multiple accounts, **and**
- Claim forms submitted together and cross-referenced with an explanation of which traveler incurred the expense.

Remember: Copies of receipts not acceptable.

If the staff member occupies a room with a spouse or other non-university person (double room rate), it is the traveler's responsibility to have the place of lodging note and initial the single room rate on the lodging receipt, even if the single and double room rates are the same. If this is not done, Disbursements

will determine the single room rate from various travel publications or from the local travel agencies and will reduce the reimbursement request accordingly.

Campgrounds

Commercial receipts for campgrounds will be reimbursed as lodging receipts.

PERSONAL TIME WITH BUSINESS TRAVEL

University funds cannot be used to reimburse personal expenses. A person should exercise special care not to seek reimbursement for expenses that could be construed to be personal. Occasionally an employee may take a trip that includes both personal and business travel. A combination trip benefits the traveler to some extent.

Transportation:

When the traveler decides to combine business travel with personal travel, regardless of the type of transportation, the amount reimbursed will be the fare directly related to the point(s) of business based on the **actual** ticket purchased. The travel or transportation ticketing agent can provide the cost of the business portion of the trip when the combination ticket is purchased.

This amount **should be calculated 'before'** the trip and outlined in box 15 on the Form 17. The statement from the travel or ticketing agent should be attached to the reimbursement request, Form 25.

Example:

- The traveler purchases a ticket to travel from City A to City B for University business and to City C for personal reasons, then back to City A. The traveler will be reimbursed for the direct one-way business portion (City A to City B) times two plus taxes.
- The traveler purchases a ticket to travel from City A to City C for personal reasons, then to City B for University business, then returns to City A. Again the traveler will be reimbursed for the direct one-way business portion (City B to City A) times two plus taxes.

If a statement from the travel or ticketing agent verifying the business portion of the trip is not included with the reimbursement request, we will determine the cost of the direct, one-way business portion of the trip, double it and add applicable taxes. Any remaining cost is the travelers responsibility.

If the traveling employee and the department head agree to extend travel time consuming additional work time or personal time (e.g., Saturday & Sunday) in order to reduce the cost of travel, that is their prerogative. However, it must be stressed that people will not be forced to use their personal time (e.g., weekends or holidays) to secure less expensive fare or less overall out-of-pocket costs.

Car Rental:

The traveler must pro-rate the rental based on the number of personal days versus business days.

Remember: Purdue insures, on a worldwide basis, the collision damage exposure for vehicles rented by staff traveling on university business. Therefore, the waiver offered by the rental company should not be purchased for the days the car is used for University business.

Advise the rental car company that Purdue University self-insures rental vehicle collision damage. A wallet card is available from Risk Management with the insurance information on it.

Lodging:

Lodging expense will be reimbursed based on the location of travel, upon presentation of an original receipt from a commercial lodging establishment. The receipt should show dates of occupancy and the name and address of the place of lodging.

Individual travelers are limited to reimbursement of the single room rate. If a family member or other non-business related person stays in the room with the traveler, it is the traveler's responsibility to have the hotel indicate the single room rate on the receipt at the time of check-out.

Parking:

Parking expense at the airport and hotels must be reduced for personal day expenses.

Subsistence:

Subsistence will not be reimbursed for any days in which an employee is in vacation status. One day is allowed for travel to and from the business destination.

REGISTRATIONS

Registration fees for attendance at professional meetings may be reimbursed upon presentation of an original receipt. If receipts are not provided by the conference/workshop, it is the traveler's responsibility to obtain an acceptable proof of the claim for reimbursement (i.e., proof of payment and a supporting document indicating the amount).

If the registration fee includes any meals or meals are furnished gratis (i.e., dinner with colleague or vendor sponsored meals) these should be deducted from the subsistence allowed.

Foreign Travel:

Visit <http://www.adpc.purdue.edu/Travel/subsist2.htm#fedpdie> at our Travel Procedures web site for Federal Per Diem rates for foreign travel supported by federal funds. See page 6 for foreign travel supported by state funds.

When Subsistence Is Not Paid

When subsistence is not being paid, no deduction will be made for meals furnished (re: one day trip) unless meals are listed separately (optional) from the actual registration fee.

Membership Dues

Membership dues included with a registration fee are not reimbursable.

Additional charges for books, publications, tapes, etc. from conferences or workshops are reimbursable on the Form 25 if the material is kept in the department. A statement to that effect must appear on the travel reimbursement request.

Pre-Paying Registrations

Guidelines for Registrations Paid by Invoice Voucher

- Registration fees are due prior to the travel.
- Meals, tours, and other costs in addition to the registration fee must be paid by the staff member.
- A copy of the approved Form 17 and other relevant information (i.e., completed registration form) are attached to the Invoice Voucher.

All payments via direct Invoice Voucher related to staff and student travel should be directed to the Travel Clerk in Disbursements. Payments and reimbursements via direct Invoice Voucher for non-Purdue staff, non-Purdue students and for prospective employees should be directed to the Expenditures Authorization Clerk in Accounting Services.

Prepaid Registrations Using Department Procurement Card

We have approval to authorize use of the department procurement card for charging registration travel expenses. The procedure to charge registrations only is outlined below.

The Business Office will:

- a) Make a copy of the approved Form 17 (with the indication in section 15 that the registration expenses will be charged).
- b) Review the registration form to assure the expenses are allowable.
- c) Identify and highlight on the registration form any meals that are covered by the registration fee.
- d) Attach the Form 17 copy to the registration form.
- e) Call the company and charge the registration using the approved purchasing card for travel expenses and indicate this on the registration form.
- f) File the above paperwork awaiting the purchasing card transaction listing and the traveler's submission of the Form 25, Travel Reimbursement Request.
- g) When the purchasing card transaction listing is received, verify the charges are correct, and confirm the charges.
- h) When the traveler submits the Form 25, verify that the prepaid meals are properly accounted for, complete the review of the Form 25, sign, and submit it for payment.

If a Form 25 will be filed for additional expenses, please reference the direct Invoice Voucher number and enclose a copy of the registration form with the Form 25. Also, deduct any meals that were included in the registration fee from the subsistence.

CURRENCY EXCHANGE RATES

The following sources for converting receipts in foreign currency to US dollars for reimbursement purposes may be found at <http://www.adpc.purdue.edu/Travelcurrency.htm>. Please remember to use the rate for the same time period as your travel.

The calculation for the exchange should be written directly on the receipt.

Example: On 9/25/95 the conversion rate for FF to US dollars was .2023. Written on the receipt should be: 2000 FF * .2023 = \$404.60 US dollars, this should then be transferred to the appropriate line on the Travel Reimbursement Request Form 25.

The currency exchange rate should be noted on the receipts attached to the Form 25.

TRIP CANCELLATION OR CHANGES

A trip may be canceled in the event of an emergency. An emergency is defined as the illness or death of the traveler or immediate family member of the traveler. In addition, the traveler's supervisor or department head may have a business need to cancel the trip. Any other reasons for canceling or changing the trip must be approved in writing by the individual who approved the original Form 17.

If a business trip must be canceled or changed, expenses already paid by the traveler are reimbursable with appropriate documentation and required receipts. To be reimbursed for airfare, the original ticket must be attached to the Form 25 and sent to the Business Office. The business office should retain the ticket for possible exchange and future business trip by the traveler.

When a 'non-refundable' ticket can be exchanged for a future business trip, the expense (usually \$75 - \$100) is reimbursable with appropriate documentation when the traveler returns from the trip.

If the airline ticket has been purchased using the University purchasing card, the employee will be required to reimburse the University if the trip has been canceled for a reason other than described above.

FORM 17 VARIANCES (REVISIONS)

Domestic and Foreign Travel Variances

When a traveler takes a business trip (domestic or foreign) and one of the following situations occur, a statement of explanation should be documented on the Form 25:

- a) Significant change in travel plans, i.e., business destination(s) (cities, states, or countries)
- b) Significant change in travel dates
- c) Extending a trip more than 2 days over number of days approved on the Form 17
- d) Dollar amount is 20% greater than approved Form 17 estimate
- e) Change in account number

The Business Office is responsible for making sure the justification is on the Form 25 when

needed and that an academic staff member with Type 1 department head signature authority has approved the justification by signing the Form 25. The Business Office will approve the Form 25 on the Comptroller signature line. This approval acknowledges that the travel follows University Travel Policy and all required signatures have been obtained.

No Expense Form 17s

A Form 17 is required even if there is no expense to the University. State "No Cost to the University" on Form 17 in the account number area.

Sponsored Program Form 17

For funds 500-699, if an individual is traveling on an account where they are not paid, the following certification must be made on the Form 17 by the principal investigator (line 15):

The traveling individual is not currently receiving any portion of his/her salary from this grant. This is to certify that the individual is actively engaged in research on the grant and the approved travel is related to the research. Signature Principal Investigator

GUIDELINES FOR PREPARING AND SUBMITTING FORM 25

Department Routing And Processing - Form 25

Routing

In the academic departments, the usual routing process for Form 25's:

- 1) Traveler or department secretary prepares the reimbursement based upon actual expenses from the trip including receipts and other documentation.
- 2) Traveler signs the document certifying that the expenses claimed are correct and accurate.
- 3) The Department Head or someone the Department Head has given signature delegation must sign on the Department Head approval line.
- 4) The Business Office must review the Form 25 for proper signatures, adherence to travel policy, math is correct, receipts and attachments are provided, Form 17 is attached, and any additional explanations are attached.
- 5) The business office also compares the Form 25 with the Form 17, verifying that the account number on both are the same. Resolves any issues associated with other differences.
- 6) A person with Type 1 Comptroller signature authority must sign on the Comptroller approval line.
- 7) Retain the department copy of the Form 25 and route the document to Disbursements. The travel clerks audit for the business office signature.
- 8) The reimbursement check is mailed directly to the traveler.

Processing

1. The social security number of the person requesting reimbursement must be shown on the Staff ID line.
2. Please use only one staple to attach documents to Form 25. Staple in upper left-hand corner of document.
3. If receipts are numerous, tape or glue the receipts to a 8 1/2 x 11 piece of paper so they will not be lost. Please remove all staples as the receipts will be microfilmed by central office.
4. Original receipts are required for lodging, plane fare (passenger coupon), registration, parking and other miscellaneous expenses except taxis, local conveyances (city bus) and tolls.
5. Charge card receipts alone are not acceptable for reimbursement of any expense.
6. The traveler should always turn in a lodging receipt that shows the single room rate.
7. If the receipt does not state that the rate shown is the single room rate, the hotel clerk should note on the receipt that it is the single room rate (or what the single room rate actually is).
8. If the room is shared with another employee, the charges should be divided proportionately. Separate receipts should be requested from the hotel clerk when checking out.
9. If the room is shared with a non-university person, the single room rate should be shown.
10. If an airline ticket was not issued, some form of documentation should be obtained from the travel agent or airline and included showing payment of the ticket. This documentation could be the itinerary and charge card receipt or a receipt obtained from the airline. Documentation should include total cost, cost per leg of trip, dates and places of departure and arrival.
11. Telephone calls for University business can be reimbursed. To be reimbursed, the traveler must indicate which telephone charges were connected with business by stating "business" next to the charge on the receipt or noted on the Form 25. Fax, EMail, and cellular phone charges require the same procedure for reimbursement as telephone calls. Cross out all non university calls on the lodging receipt.
12. Be sure to separate out the registration fee expenses using the specific object code.
13. If airfare or registration fees were prepaid, please cross reference on the reimbursement request.
14. Any meals provided in the registration must be deducted from subsistence on the Form 25.
15. The standard deduction for meals included in the registration fee or furnished gratis is 25% of full rate for a breakfast or lunch and 50% of full rate for an evening meal if subsistence is also paid.
16. Additional charges for books, publications, tapes, etc. from conferences or workshops are reimbursable on the Form 25 if the material is kept in the department. A statement to that effect must appear on the travel reimbursement request.
17. Include an explanation if any of the following situations occur and the travel is domestic:
 - There has been a significant change in travel plans (i.e., change in dates, cities).
 - Subsistence is requested for more than two days over the number of days approved.

- Dollar amount is approximately 20% more (Higher) than estimated.
 - There is a change in account number (if foreign travel or SPS account numbers).
18. If the travel is foreign, and if one of the four situations listed in 18 above occurs, a Revised Form 17 should be attached to the Form 25.
 19. If the travel is authorized as Blanket Travel, the Blanket Travel Box must be checked.
 20. If a computer generated Form 25 is submitted for reimbursement, the only correction that will be shown on the departmental copy will be on the distribution line.
 21. Business Office should sign on the Comptroller Signature line denoting that the travel adheres to University Travel Policy and all required signatures have been obtained.
 22. Any out of the ordinary situations should be accompanied by an explanation. (Example: Vacation during the trip, side trips, no lodging or subsistence being claimed).

RECEIPT REQUIREMENTS

Prior to May 1, 2003, receipts were required for all expenses except taxi and tolls.

Beginning May 1, 2003, original receipts are required for all expenses submitted for reimbursement \$75 or greater.

NOTE: Lodging receipts are required regardless of amount. Additional details on specific types of receipts are included on this page.

Exceptions:

Documentary evidence, i.e. receipt, is not required if the following apply

- Expense, *other than lodging*, is less than \$75.
 - Receipts are ALWAYS required for lodging.
- Incidental expenses may be totaled in reasonable categories without receipts as long as the aggregated total is 'under' \$75, i.e., parking and gasoline. This is not mandatory, each item under \$75 may be listed separately on the Form 25.

Lodging/Hotel Receipts:

The acceptable lodging receipt is an itemized receipt provided by a place that is in the business of providing lodging. The receipt must include:

- ◆ Name and location/address of lodging
- ◆ Dates of stay
- ◆ Separated costs for lodging, meals, telephone calls, and parking

If a staff member occupies a room with a spouse or other non-university person (double room rate), the place of lodging must note and initial the single room rate on the lodging receipt even if the single and double rates are the same.

Airfare Receipts:

An airfare receipt totaling \$75 or greater is adequate when it includes:

- ◆ Name of air carrier
 - ◆ Name of traveler
 - ◆ Dates of travel
 - ◆ Destination(s) or legs of trip
 - ◆ Fare/class of travel
 - ◆ Total cost of ticket
- ◆ The passenger coupon or detailed itinerary is required as proof of payment for air travel if a paper ticket is purchased from a travel agency.
 - *Purdue encourages our travelers to request a copy of the passenger coupon when purchasing e-tickets from a travel agency.*
 - ◆ Boarding passes can be used as backup information, not for actual receipt information.
 - ◆ If a ticket is not issued for the flight, the proper documentation consists of the travelers itinerary. If the itinerary doesn't provide payment information, the traveler should also attach a receipt from the airline, charge card receipt and/or front and back copy of canceled check.
 - ◆ If the traveler uses an internet booking tool, such as Travelocity, Expedia, etc., be sure to print out the receipt (*not just the quote*). The receipt should provide proof of payment for the itinerary.
 - ◆ If the employee is traveling on a PRF Foreign Travel Grant, a copy of the ticket and any other reimbursed receipts must be attached to the reimbursement voucher along with a copy of the letter awarding the grant. These copies should be clearly marked showing expenses were already reimbursed by PRF.

Car Rental receipts:

The acceptable car rental receipt is an itemized receipt (for costs \$75 or greater) provided by a place that is in the business of renting vehicles.

Registration Receipts:

Registration fees \$75 or greater for attendance at professional meetings may be reimbursed upon presentation of an original receipt.

If receipts are not provided by the conference/workshop, it is the traveler's responsibility to obtain an acceptable proof of the claim for reimbursement, i.e., proof of payment (credit card receipt) and a supporting document indicating the amount.

Receipts for Purchases:

Additional charges \$75 or greater for books, publications, CDs, tapes, etc. from conferences or workshops are reimbursable on the Form 25 with an original receipt. A statement that the items purchased becomes property of the department must appear on the travel reimbursement request. To be reimbursed for purchases, such as, copying, presentation materials, research materials, an original receipt must be included with the Form 25 request for reimbursement. The purchases must be directly related to the purpose of the travel.

Parking receipts:

Parking charges \$75 or greater are a reimbursable expense based on the following criteria.

- ◆ Parking Garage: Receipt required
- ◆ Parking at Hotel: Receipt required
 - ◇ Personal or Rental Vehicle:

- Separate the parking expense from the lodging amount and claim it on the Form 25 as miscellaneous expense.
- ◇ University Vehicle:
 - When a University vehicle is used, parking is not reimbursed on the Form 25. Submit a copy of the lodging receipt to Transportation Services for reimbursement of the parking expense.

Parking expense must be reduced for personal day expenses.

Missing/Lost Receipts

If receipts are lost, it is the traveler's responsibility to obtain acceptable proof of the claim for all hotel expenditures and other expenses \$75 or greater.

The requirements listed below must be followed if the receipt for an expense \$75 or greater is lost or unobtainable,

- ◆ Lodging Expense:
 - Lodging requires copy of statement from provider.
- ◆ Airfare Expense:
 - Airfare requires copy of documentation from provider or background documentation, i.e., boarding passes, credit card receipt, copy of front and back of canceled check or bankcard statement.
- ◆ Rental Car Expense:
 - Rental car requires copy of documentation from provider.
- ◆ Other Expenses:
 - Other lost receipts for expenses \$75 or greater must be documented using the Form 25MR, Certification for Missing Receipt, or a written explanation signed by traveler. This form is available on the Travel web page at:
<http://www.adpc.purdue.edu/Travel/receipt.htm#lostreceipt>

Paying for Expenses of Another Employee or Student

Faculty/Staff members may be reimbursed when paying for expenses on behalf of other employees or students.

- ◆ Only the employee bearing the ORIGINAL receipt would be allowed to claim reimbursement for the expenses paid on behalf of a fellow staff member or student.
- ◆ To avoid double reimbursements, there should be no copies made of the original receipt.
- ◆ If the expense is split between departments, either the traveler or business office is required to distribute the reimbursement to the necessary accounts on the Form 25.
- ◆ All related reimbursements should be submitted together or each reimbursement cross-referenced with an explanation of which traveler incurred the expense.

TRAVEL ADVANCES / PURDUE RESEARCH FOUNDATION

Travel advances are generally available to:

Student employees, clerical and service employees and monthly paid staff with visiting, temporary or adjunct appointments.

For those individuals who qualify for the American Express Corporate Card, the following items may be advanced:

Airfare: When must be paid more than forty-five (45) days prior to departure date.

Subsistence: When it totals more than \$250.00.

For those individuals who do not qualify for the American Express Corporate Card, an advance may be obtained on all items listed on the Form 17 with the exception of:

University vehicle (Credit Cards are provided for gasoline)

Registration fee of \$50 or more.

Procedure to Request Advances:

- 1) Advances must be requested in writing and must include:
 - a) A copy of a Form 17 (Request for Authority to Travel) approved by the appropriate *DEAN/DESIGNEE*. Approval by the project Administrator in SPS must be obtained on fund centers 500-699 on all foreign travel before submitting travel to PRF.
 - b) A completed PRF Form 1000 (Request for Advancement of Travel Funds) approved by Department Head or Business Administrator.
 - c) The traveler's personal postdated check in the amount of the advance and dated three (3) weeks from the date of return to campus. This check must be payable to **PURDUE RESEARCH FOUNDATION**.
- 2) The request must be submitted to the PRF Business Office (Room 100 - HOVDE Hall) **minimum of five (5) working days prior** to the date the advance is needed. The advance will be ready for pick-up no earlier than two (2) working days prior to departure.
- 3) For airline/lodging reservations, where necessary, an advance for the airfare/lodging only may be obtained when airfare/lodging must be paid more than forty-five (45) days prior to departure. In such cases, the remainder of the advance would follow the procedure outlined above.
- 4) Payment of registration fees of \$50 or more are to be made directly from University funds (refer to the Business Procedures Manual).
- 5) Personal checks to reimburse PRF will be cashed on the date of the check unless notification of non-reimbursement by the University is provided by the departmental Academic Business Administrator or departmental Business Office. This notification must be received by the last working day before the date of the postdated check. It is the responsibility of the requesting department to inform PRF when reimbursement may be delayed.

- 6) Such checks will be held **no longer than two (2)** additional weeks.
- 7) If an advance is determined to be uncollectible upon the expiration of the above mentioned two week extension, or upon return of a check by the bank, the balance due PRF will be charged to the departments/schools discretionary funds held by PRF. Such action, when necessary, will be reported to the appropriate Academic Business Administrator.

SABBATICALS

Travel expenses for a faculty member to and from a sabbatical site are not reimbursable by the university. Funding for any university business-related travel while on an approved sabbatical is allowable under normal travel regulations. If during the sabbatical the faculty member is recalled to campus or other locations for university business, travel expenses associated with the trip are allowable under normal travel regulations.

Grants or stipend adjustments to defray family travel expenses related to a sabbatical are sometimes available. Refer to Executive Memorandum B-11 or your business office for more information.

PROSPECTIVE EMPLOYEES and GRADUATE STUDENTS

Administrative/Professional/Faculty

Individuals (and their spouses) visiting campus to interview for a position may be reimbursed for some of the trip's associated expenses. Prior approval to reimburse these expenses is obtained by processing a Form 17C.

Interviewee spouse expenses are reimbursable in accordance with normal travel reimbursement regulations. When requesting reimbursement of a spouse's travel expenses, a separate Form 17C for the spouse must also be completed and routed for approval along with the prospective employee.

Expenses for the spouse should be presented with the prospective employee's receipts on an Invoice Voucher Form 56, for reimbursement along with copies of each Form 17C.

Graduate Student

Prospective graduate students (and their spouses) may be reimbursed for allowable travel expenses under the same guidelines as prospective employees.

Graduate spouse expenses are reimbursable in accordance with normal travel reimbursement regulations. When requesting reimbursement of a graduate spouse's travel expenses, a separate Form 17C or memo for the graduate spouse must also be completed and routed for approval along with the prospective graduate.

Permission to reimburse graduate student travel expenses is obtained through a memo from the department head to the dean. The request is approved by the dean and the assistant comptroller for accounting services. This memo should be completed annually and include:

1. The estimated number of graduate students to visit the department and be reimbursed by the university.
2. The estimated travel expenses per graduate student for each visit.

Because permission to reimburse expenses is given with the approval of this memo, no further forms or approvals (i.e., a Form 17C) are required. With appropriate receipts, allowable expenses may be reimbursed using the invoice voucher system. A copy of the approval memo should be attached to the invoice voucher when it is forwarded. Expenses are chargeable to general funds, industrial or gift funds under normal guidelines.

Recruitment expenses charged to sponsored project funds are allowable if the recruitment is for a specific position on the project. See your business office for further information.

EMERGENCY LEAVE FOR STAFF TRAVELING ABROAD

1. Reimbursement of transportation costs not to exceed the least-cost, most-direct, economy class, round-trip air travel from the staff member's post abroad to West Lafayette, Indiana will be paid for trips made for purposes specified in (2) below.
2. Serious illness of the staff member, or death or serious illness of the staff member's spouse, children or parents.
3. In addition, the transportation costs, as determined under (1) above, for the spouse of the staff member serving abroad will be reimbursed, provided the university paid the transportation costs of the spouse in going abroad. In the case of the spouse, these costs will be reimbursed for trips made because of serious illness of the spouse, or death or serious illness of the staff member, children or the parents of the spouse.
4. Per diem will not be paid.

OTHER LEAVES OF ABSENCE

Relocation expenses to a foreign work site, due to participation in an exchange or study abroad program for an extended period of time are sometimes reimbursable by the university. Whether or not the travel expenses are allowable is often dependent upon the source of funds. Your business office can provide more information and help determine if the expenses would be allowable.

Funding for any university business-related travel while on an approved leave is allowable under normal travel regulations. As with a sabbatical, if the faculty member is recalled to campus on university business, the travel, needed lodging expenses while on campus and other expenses associated with the trip are reimbursable under normal reimbursement rules.

TRAVEL REIMBURSEMENT REMITTANCE ADVICE

When University staff is reimbursed for travel expenses, the date(s) of travel are included on the check stub (remittance advice) as the Invoice Voucher number.

Example:

Invoice Voucher Number 05163103 signifies travel from May 16 through May 31, 2003
Invoice Voucher Number 122003010504 signifies travel from Dec. 20, 2003 through Jan. 5, 2004.

CORRECTION NOTICE

If the reimbursement amount is different than requested on the Form 25, we will send a 'Notice of Correction' along with the check explaining the modification.

WHAT DOCUMENTATION CAN BE USED AS A QUOTE/COST COMPARISON?

1. A written statement from a travel agency
2. Printout from airline website
3. Printout from an online vendor, i.e., Expedia or Orbitz

NOTE: Comparisons are only accurate if obtained 'prior' to travel and must show the lowest available commercial coach airfare for one individual for the same business dates to the same business destination! To qualify 'prior', the comparison should be obtained at the same time the tickets are purchased.

- Tickets purchased separately (one-way) to travel on personal business should not be included in the price when comparing the cost of tickets.

WHAT IF A TRAVELER DOESN'T HAVE A QUOTE/COST COMPARISON?

If ***PRIOR** expense documentation is not provided, the traveler will be reimbursed as follows:

- a. by doubling the cost of the direct, one-way business portion of the trip plus applicable taxes from the actual ticket receipt provided,
- b. by using the 'current lowest fare with stopovers',
- c. utilizing the cost of co-worker ticket as comparison; or
- d. the amount requested, whichever is less.

Any remaining cost is the travelers responsibility.

WHEN IS A COST COMPARISON REQUIRED?

Any cost comparisons should be made '**prior**' to the trip and for the same dates as the actual business trip.

1. Driving VS Flying:

The mileage reimbursement cannot exceed the best available airfare [prior to travel](#). To qualify for reimbursement when driving longer distances (Rule of Thumb: Greater than 800 miles roundtrip) normally accomplished by flying, the expense under the "Drive Vs Fly" rule must be the lesser of the actual mileage expense or total of:

- Best available airfare
- Roundtrip mileage to airport
- Airport parking
- Shuttle expense to/from airport to business location

2. *When leaving from a location other than 'Official Station':*

Travel expense reimbursement is limited to the lesser of expenses incurred from the departure point or from the "official station". The official station is defined as the location of the permanent office.

If the traveler is departing from some place other than their permanent office, a comparison/quote obtained [prior to travel](#) must be attached to the Form 25, Request for Reimbursement, indicating expenses are the lesser of the two.

3. *Discounted Fare Due to Additional Overnight Stay (generally a Saturday Night):*

Discount air travel arrangements that require an additional night(s) lodging and/or subsistence are reimbursable under the following conditions:

- Additional lodging and subsistence must not exceed regular economy/coach fare at the time the trip is taken.
- The comparison should include a quote for coach fare ([prior to travel](#)) without the additional stay, amount of discounted fare, additional lodging, subsistence, rental car days, airport parking, and any other expenses incurred on behalf of the extra day(s) stay.
 - The total of the discounted fare, days of additional lodging, subsistence, rental car, airport parking, and any other expenses incurred because of additional stay should be less than quote without additional stay.

4. *When Combining Personal and Business Travel:*

Occasionally an employee may take a trip that includes both personal and business travel.

When this occurs, the following rules apply.

1. If the stay at a business location is extended either prior to or after the business mission, the entire ticket may be reimbursed.
2. If any other destinations (other than normal connecting airports) not pertaining to the business purpose are included on the ticket, the amount reimbursed will be the fare directly related to the point(s) of business based on the fare class used. The traveler must provide a written quote obtained from the airline, travel agency or a printout from a website as proof of cost for the direct route to and from the business location. This must be obtained '**PRIOR**' to travel, outlined in Box 15 on the Form 17, and attached to the Form 25, Request for Reimbursement. To qualify '**PRIOR**', the comparison should be obtained at the same time the tickets are purchased.
 - Tickets purchased separately (one-way) to travel on personal business should not be included in the price when comparing the cost of tickets.
3. Airfare reimbursement will not be made for non- university business travel even though the total discounted airfare is less than regular coach fare.

A combination trip does benefit the traveler to some extent, therefore, travelers should exercise special care not to seek reimbursement for expenses that could be construed as personal. Additional information can be found at [personal and business travel](#).

5. When Using Private, Leased or Chartered Aircraft:

When an employee or others rendering service to the University use a private owned aircraft in the conduct of official university business the cost is reimbursable up to the lowest available round trip commercial coach airfare for the same dates and destination of travel.

The actual lease cost for aircraft leased from a commercial leasing company or Purdue Aero Club is reimbursable up to the round trip commercial coach airfare rate for the same trip for the same number of official passengers.

Chartered aircraft expenses are reimbursable up to the lowest available round trip commercial coach airfare for the same dates and destination of travel.

In each of the situations above, a traveler must provide a written quote '**PRIOR**' to travel. The quote may be from a travel agency, airline or printout of an online quote.

OBJECT CODES

TRAVEL EXPENSES (HOTEL, CAR RENTAL, ETC)

- ♦ INDIANA 5-5901
- ♦ OUT-OF-STATE 5-5903

♦ FOREIGN	5-5906
AIRFARE:	
♦ DOMESTIC	5-5918
♦ FOREIGN	5-5919
REGISTRATIONS:	
♦ DOMESTIC	5-5631
♦ FOREIGN	5-5632
Other Object Codes used:	
SAME DAY TRAVEL	5-5941
ATHLETIC RECRUITING	5-5984

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