

Tufts Travel Policy

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Policy Statement

Tufts faculty, staff, and students are periodically required to travel on behalf of the university in furtherance of its educational and research mission. The intent of this policy is to help facilitate that travel and is designed to be fair and equitable to both the traveler and the university. It applies to all university travel regardless of the funding source. To be reimbursable, all expenses incurred must be necessary to the business of the university and in compliance with IRS, state and/or granting agency regulations and represent a reasonable and appropriate use of university funds.

The university travel policy is outlined in general terms and is not intended to cover every possible situation or scenario that may arise. In all matters, travelers are representing Tufts and should act in an ethical, practical and fiscally responsible manner.

Applicability and Responsibility

This policy applies to employees and non-employees who travel on authorized university business regardless of the funding source. Travelers are expected to be prudent and exercise good judgment when incurring travel costs. All expenses submitted for reimbursement must be in compliance with this policy.

Accountable Plan

Tufts University has, in IRS terms, what is known as an "accountable plan." Under this plan, travelers are required to substantiate (with original receipts) all expenses within a reasonable amount of time. As such, reimbursements are not subject to state or federal taxation. Conversely, expense reimbursements that do not meet these criteria will be treated as taxable income to the recipient. For the purpose of this policy, a "reasonable" amount of time is considered to be within 60 days of completing the trip.

Grant Travel

Generally, grant-supported travel must comply with the university's policies and procedures. However, specific grants may impose stricter requirements that must be followed. It is expected that grant funded travelers are aware of applicable restrictions and acknowledge that expenses submitted for reimbursement and charged to grants are in full compliance with a grant's requirements. For more information regarding grant funded travel please see the [Sponsored web-site](#)

Travel Authorization

Prior to traveling, all university travelers must receive the approval of their direct supervisor or financial/budget officer. Individual schools/units can determine how this authorization is obtained, that is, they can require a simple verbal approval between the traveler and their supervisor or develop a more formalized process. The university's on-line travel expense system ([e-Expense](#)) provides the functionality to obtain the travel authorization electronically. Please see the e-Expense user guide for instructions on [creating a Travel Request](#). ***Individuals who travel without prior approval may be held personally responsible for any expenses they incur.***

Trip Identifier

For tracking purposes, a unique trip identification number is required for travel involving an overnight stay or the purchase of an air, rail or bus ticket. This identifying number will be assigned by utilizing the university's on-line, e-Expense travel system either when obtaining a travel request approval upfront or when the traveler submits an expense report.

University Paid Corporate Card

Tufts provides a [university-paid Corporate Card](#) (MasterCard) program for all employees who travel on university business. The university requires all travelers to use the card for travel related purchases and expenses. All legitimate travel expenses incurred on the card will be directly paid by the university. Additionally, using the card will simplify the travel reconciliation process by feeding and integrating those charges directly into the [e-Expense](#) system. Please see the e-Expense user guide for instructions on [importing your card transactions](#).

Travel Suppliers

The Purchasing Department has established relationships with certain travel suppliers. Travelers are encouraged to use them whenever possible. Designated travel agencies have been selected to provide a full range of travel services to university employees. In addition, Purchasing has negotiated rates that can provide cost savings on hotel stays and/or rental car agreements. For a full listing of these preferred vendors, please check the [Tufts Travel Portal](#) or the [Purchasing web site](#).

Air, Rail, Bus Tickets

All purchases of air, rail, or bus tickets must be made through a university designated travel agency or purchased using the [Tufts Corporate Card](#). Travelers must book the most economical rates available regardless of preferred airlines or frequent flier programs, and are encouraged to consider alternative airports to Logan to obtain better pricing. In recognition of the hardships of air travel, employees booking individual trip segments lasting eight (8) hours or more are allowed to purchase business class fares (stricter rules governing trips being charged to a sponsored grant may apply). In all cases, these higher cost business class fares are subject to prior budgetary approval. Budgetary restrictions will supersede university policy.

Employees traveling internationally on a federally sponsored grant must also comply with the requirements of the Fly America Act. For more information about this act, please go to <http://www.gsa.gov/portal/content/103191>. Due to the complexities and requirements of foreign travel, employees are strongly encouraged to contact a designated travel agent to assist in booking trips (as opposed to utilizing an on-line agency). Experienced agents can advise you of discounted fares and assist with other regulatory requirements (visas, passports, immunizations, etc). [University designated travel agencies](#) can also offer special, negotiated fares to university employees. Please see the [Tufts Travel Portal](#) or the [Purchasing Web Site](#).

Hotel

University travelers should make all hotel reservations through the university-designated travel agent(s), and stay at reasonably priced hotels (not luxury hotels). The [university-designated travel agent\(s\)](#) will secure the lowest room rates available, by using negotiated hotel rate agreements and/or the 'educational rate' offered by many hotel properties. Many times conferences will offer reduced rates for hotels; employees should take advantage of those rates and not stay at more expensive hotels.

Hotel Taxes

Although Tufts is a tax exempt organization, as a general rule travelers must pay taxes charged by hotels. However in certain states, some/all of these taxes can be waived provided specific conditions are met. For a listing of those states/conditions, please click [here](#). University travelers are encouraged to take advantage of these savings when applicable.

Rental Cars

Employees needing to rent vehicles while on university business should utilize existing university vendors and must rent compact or midsize vehicles. Employees must use the corporate card to pay for the rental and for domestic rentals, decline all insurances (LDW, CDW) as this is provided free of charge by MasterCard. For international rentals, employees should accept the insurance and will be reimbursed for the cost.

Receipts and Per Diem Allowances

The university has what is known in IRS terms as an “Accountable Plan.” Under this program, travelers are required to substantiate all expenses with actual, itemized receipts or they can utilize a federally established per diem amount for all meals and incidental expenses. Itemized receipts are required for all lodging and rental car expenses. Also, itemized receipts are required for any meal charged to a federal grant when a per diem allowance is not utilized. The Corporate Card cannot be used to pay for Meals & Incidentals when taking per diem allowances. (For information about per diems amounts please click [here](#). The reimbursement method must apply to the entire trip, that is, you cannot utilize receipts for some meal expenses and claim the per diem amount for other meals for the same trip. (For reimbursement purposes a “trip” is defined as when you leave the local area until you return). Please see the Travel Procedures Section for specific receipt requirements. Except for when per diem allowances are claimed, reimbursement of un-receipted expenses may result in taxable income to the employee and may require additional approval or justification.

Unallowable Expenses

Generally, expenses of a personal nature, such as health club fees and entertainment expenses are unallowable. To be reimbursed, expenses must be necessary and appropriate to the furtherance of the university’s core mission. For a brief listing of unallowable expenses, please [see below](#). In addition, certain expenses may be unallowable on grant-funded travel. For more information on grant travel restrictions please see the [Sponsored web-site](#).

Reconciliation and Reimbursement

Good financial practice requires all travel reports/reconciliations be submitted in a timely manner, *typically within 30 days of completing the travel*. Properly approved and documented reports will be processed by Accounts Payable and any employee reimbursement will be made via a direct deposit to the employee’s bank account on file. All reimbursements are subject to a post-audit review by the Finance Division that may necessitate a correction for unallowable, unnecessary or undocumented expenses. If as a result of this correction money is owed to the university, the employee will be contacted for payment or a credit will be made against a future reimbursement.

Signatures/Approvals

All travel reports must be signed/approved by the traveler and approved by the traveler’s immediate supervisor or their designee. This designee must be someone with school fiscal or budgetary responsibility oversight and who is generally familiar with the activities of the traveler. By signing the report, the traveler and all approvers acknowledge that they are familiar with the travel policy and that all the expenses are necessary, reasonable, appropriate and comply with university, IRS, or sponsoring agency restrictions. ***Travelers and anyone approving a trip are accountable for the travel report even though the traveler may delegate responsibility for preparing the report to someone else (i.e., staff assistant). In all cases, the traveler must approve the report.***

Approvers also ensure that the accounting information provided is accurate; that there is sufficient funding available to cover the costs, and that receipts where required under university policy, are provided. Approvers should request further documentation or justification for any expenses that appear to be excessive or unusual and include that explanation or information with the report. ***Please note - responsibility for conformity to this policy and its associated requirements rests with the traveler and the approver.***

International SOS

Tufts University has partnered with International SOS to assist its students, faculty and staff with a variety of medical and emergency services while traveling outside of the United States on Tufts business. For additional information, please go to the risk management [web site](#) or contact [Chelsea Ferrell](#) via e-mail or 617-627-4649.

Non-employee Travel

Frequently, the university is required to pay the travel expenses for non-employees, such as current or perspective students and guest speakers. All non-employee travel must adhere to established university policies and procedures. Departments must obtain a Travel Authorization Number (T-Number) for all non-employees and arrange travel through existing university agencies. Doing so minimizes the out-of-pocket expenses of the non-employee and provides the university with additional financial oversight. The university also has local hotel properties (near all three campuses) that will bill Tufts directly further reducing the out-of-pocket costs incurred by the student or guest. For more information about these hotel properties, please see the [Tufts Travel Portal](#) or the [Purchasing Web Site](#). The initial roll-out of the [e-Expense](#) system will be configured to handle only Tufts employees. All non-employees needing to be reimbursed should continue to do so using the [paper Travel Form](#). Users will be notified when the e-Expense system is fully configured to handle non-employees as well.

For existing Tufts students, to be treated as a reimbursable business expense the student must incur the cost while on [university business](#). Students who are “active participants” (i.e., traveling to conferences to represent Tufts or present a paper) are considered to be traveling on behalf of the university and can be reimbursed. Similarly, individuals/groups that are traveling as part of a formal student organization or club are considered to be on university business. Students traveling to a conference as a means of advancing their personal knowledge are deemed to have received a travel scholarship and should be paid via a Check Voucher (see link for check voucher) form as opposed to a Travel Expense Form.

Prepayment of Expenses

When necessary the [university corporate card](#) should be used for the prepayment of all travel expenses however when not feasible, the traveler should request prepayment via an electronic requisition sent to the Purchasing Office. Click [here](#) for additional information about eReq.

Contacts

Tufts Support Service: <https://tuftstss.force.com/>

Purchasing: <http://finance.tufts.edu/purchasing/purchasing-office-contact-listing/>

Sponsored Programs Accounting: <http://viceprovost.tufts.edu/spa/contact-us/>

Safety and Risk Management: <http://finance.tufts.edu/controller/risk-management/international-travel/>

Additional Resources

Tufts Travel Portal: www.campustravel.com/university/tufts/index.html

Non-Reimbursable Expenses

In order to be reimbursed, an expense has to be necessary and appropriate in supporting the mission of the university (teaching and research). In general, any expense that is personal in nature is not allowed. The list below is an example of unallowable expenses; it is not intended to be all inclusive but rather a representation of unallowable costs. Travelers are expected to be prudent and show good judgment when expending university funds.

- First class airfares
- Business class airfare for individual travel segments less than 8 hours
- Airline club fees/memberships
- Alcohol can never be charged to a federal grant
- Child care or pet care expenses
- Costs incurred by failure to cancel a reservation
- Flight/travel insurance
- Formal wear
- Newspapers, magazines, books (unless authorized subscription to professional journal)
- Personal grooming costs (i.e., haircut)
- Traffic fines while driving personal or rental vehicles
- Visa costs unless a specific and necessary condition of the travel assignment
- Rental car upgrades such as satellite radio
- Fitness center or health club fees/memberships
- Laundry or dry cleaner charges for trips lasting 5 days or less
- Expenses for personal entertainment (such as sporting events or sight-seeing tours)
- Expenses for spouses, domestic partners or family members

Click to view the [Travel and Business Expense Guidelines](#)