

BIAC Travel Policy

A. Summary

Establish procedures for international and domestic travel.

B. Scope

These policies apply to all staff, postdocs, and students who are paid by BIAC, or by grants held or supervised by BIAC faculty. BIAC employees must abide by the travel policies for the University, which may be found at www.finance.duke.edu/travel. BIAC employees are also subject to the travel policy, procedures, and guidelines described below.

C. Policies and Procedures

All domestic and international business, training, and professional development travel must be requested and approved in advance and in writing by the employee's supervisor. Travel-related expenses may not be incurred using Duke funds prior to receiving required written approval(s). A copy of the travel approval must be included with all travel expense documentation. Departments must document planned travel/or travel allowances annually in the department budget submission and manage travel plans such that line item travel budgets are not exceeded.

When charging travel expenses to sponsored projects, travel should provide direct benefits to the project and necessary to perform the project's scope of work. Generally, allowability of travel expenses is defined by Duke's established travel policy; however it may further be restricted by sponsor's guidelines and award's conditions. Travel costs are reimbursable only for employees working on the grant and require PI's approval.

1. Requests to Travel

- All staff travel must be approved by the employee's supervisor and be directly related to their work.
- *International Travel* - Any staff member planning international travel must register the trip in accordance with Duke's International Travel Policy at <https://eruditio.aas.duke.edu/international/>

2. Making Travel Arrangements

Air Travel

- Flights should be booked well enough in advance to secure the lowest reasonable airfare.

- Duke funds can be applied only to economy class fares, regardless of the destination, number of flights, or distance traveled.
- When traveling internationally on federal grants*, a United States flag carrier must be used for flights. For specific federal guidelines on this issue view the Fly America Act here: <http://www.gsa.gov/portal/content/103191> (Last reviewed 4/16/13.)
- When a Duke Employee, for his or her convenience, travels by an indirect route or interrupts Duke related travel, the additional expenses are the responsibility of the traveler. You can only claim the portion of the cost from RDU to the business location and back. You should print a price summary reflecting the cost of the least expensive direct route for comparison. The cost of this direct route will be the basis for allocation on Duke or grant funds. In addition to the price summary, you will need to submit the receipt for your actual flight to confirm the price paid.
- Baggage Fees for an employee's first checked bag in each direction are typically allowed on both grants* and departmental funds.
- Trip/Ticket Insurance is not allowable on grants* and should not be purchased unless discretionary funds are available to cover it.

Ground Transportation

- Rental cars should be used only when reasonable ground transportation is not available. In that circumstance, rental cars are typically allowed on grants* and departmental funds. It is the employee's responsibility to use the least expensive car that is suitable for the intended business use. Duke does not cover expenses for collision/loss damage waiver, personal accident insurance, or other additional insurance coverage on rental vehicles.
- Reasonable taxi charges, incurred as part of work-related travel, are typically allowed on grants* or departmental funds. However, taxi charges are generally not allowable expenses when either a rental, Duke owned/leased, or personal vehicle is the primary mode of transportation for the trip.
- If a personal vehicle is used for longer distance travel where plane or train would be the usual travel method, mileage reimbursement is limited to the lesser of the total mileage or the cost of round trip economy class air or train fare. Pre-approval is needed for extenuating business-related circumstances, e.g., several employees traveling together, hauling equipment or materials, etc.
- The maximum mileage allowance for a personal vehicle used for to/from the RDU airport on workdays is 32 miles round trip if parking at the airport, or 64 miles (2 round trips) if not parking. On weekends/holidays, mileage is computed between the employee's home and the airport. Mileage reimbursement is typically allowable on grants* and departmental funds.
- Fuel purchases are only allowed for rental vehicles. Fuel costs related to a personal vehicle are considered to be covered by the mileage reimbursement.

- Reasonable local transportation costs (i.e. bus, subway, train), incurred as part of work-related travel, are typically allowed on grants* or departmental funds.

Lodging

- Lodging for single occupancy is typically allowable on grants* and departmental funds with the expectation that moderately priced hotel accommodations will be used.
- When traveling internationally, a per diem, based on the U.S. Department of State published rate for the area, is allowed for lodging in lieu of documentation. Per diem claims in excess of this amount are not allowed unless a grant or contract specifies otherwise. Per diems are not applicable for domestic trips.

Meals

- Meal expenses for every meal (breakfast, lunch, and dinner) should be reasonable for the location. Original, itemized receipts are required for all meal expenses. Meals are typically allowable on grants* and departmental funds.
- When traveling internationally, a per diem, based on the U.S. Department of State published rate for the area is allowed for meals in lieu of documentation. Per diem claims in excess of this amount are not allowed unless a grant or contract specifies otherwise. The number of days claimed for meals and incidentals must take into consideration the departure and return times. Please visit the Employee Travel website here for more details on the per diem policy: <http://finance.duke.edu/travel/foreign/meals.php> Please note, a per diem rate is not available for domestic travel.
- Snacks purchased in addition to regular meals are considered to be a personal expense and should not be charged to the corporate card or submitted for reimbursement. Honor bar purchases are unallowable on all Duke funds and should be covered by personal funds at checkout.
- A meal is considered a personal expense and should not be charged to the corporate card or submitted for reimbursement if the meal was included in the conference registration fee and the traveler chooses to eat at another venue.
- Alcohol, or any meal where alcohol is served, cannot be charged to a grant. These meals are considered entertainment expenses and should not be charged to the corporate card or submitted for reimbursement unless there are discretionary funds available to cover the expense.
- For meals that include more than one person, please provide the additional names, their relationship to Duke, and the business purpose why you are paying for their meal. Group meals are not typically allowable on a grant unless all attendees are directly related to the project and there is a direct benefit to the project. Duke funds and grants cannot be used to pay for meals of family members accompanying Duke Employees on trips.
- Meal expenses on departure or return day are only allowable if the departure/return falls within the appropriate time frame (see chart below). BIAC considers departure times as three hours before an

international flight departure and two hours before a domestic flight departure. Meals outside of these time frames should not be charged to the corporate card or submitted for reimbursement.

Departure Times	Meals Allowable			Return Times	Meals Allowable		
	Breakfast	Lunch	Dinner		Breakfast	Lunch	Dinner
Before 7am	yes	yes	yes	Before 6 am	no	no	no
7am-11am	no	yes	yes	6am-11am	yes	no	no
11am-530 pm	no	no	yes	11am-530 pm	yes	yes	no
5:30-11:59 pm	no	no	no	5:30-11:59 pm	yes	yes	yes

Registration

- Conference registration is typically an allowable travel expense on grants* and departmental funds. However, keep in mind that there is a difference between registration costs and membership dues. Membership dues are not allowable on federal grants. Moreover, the purchase of membership dues with departmental or discretionary funds must be approved by the BIAC director in advance. This approval can be obtained by sending an email to the BIAC Director. Once you receive the approval response, you can purchase the membership.
- Generally, travel expenses should be charged to the individual traveler's corporate card, whenever possible. Exceptions may occur when a discount rate is offered for group registration and/or accommodations or when a group of staff members share a meal. In these cases, the expenses should be charged to the corporate card of the highest ranking group member and documented on the corporate card and travel expense forms. Lab members should seek their supervisor's assistance when making travel arrangements. If the supervisor has a corporate card, the lab members should have their expenses charged to the supervisor's card to avoid out-of-pocket expenses. Out-of-pocket expenses cannot be reimbursed until after the trip is completed.

3. On-line Travel Expense Form

The on-line travel expense form should be submitted within five business days after completing travel and returning to campus. Please see instructions on how to submit the online travel expense form through Duke at Work here: <http://wiki.biac.duke.edu/biac:travelpolicy>.

Scanned copies of original receipts are required to be uploaded when completing the on-line form. There should be one PDF file for all receipts and they should be scanned in the order listed on the travel reimbursement form. The BIAC front office can assist with this process. Original receipts along with the BIAC Travel Summary Form, if used, should be delivered to the BIAC front office before the trip will be processed.

The BIAC front office can enter the trip for you through Duke@Work. Please bring the BIAC Travel Summary Form and all original receipts from your trip to the front office within five business days after completing travel and returning to campus.

- *Air/Rail/Bus* – Ticket purchase receipt and/or ticket stub including price paid for ticket as well as receipts for any change penalties or cancellations. Please provide your boarding passes with the receipt. If the airline keeps your boarding pass(es), please make a note to that effect on your travel summary form.
- *Other transportation charges* – Provide employee's baggage fee receipt(s), taxi receipt(s), and/or parking receipt.
- *Rental Vehicle* – Receipt or contract with itemization of final charges
- *Lodging* – Receipt with itemization of charges
- *Registration Fees* - Original receipt, cancelled check or registration confirmation with itemization of charges.
- *Meals* - Original itemized receipts for all meals
- *Other Expenses* - Original itemized receipts. Notes should be included if meals are purchased for others. (Note: Additional meal costs will not be reimbursed for meals that are included with registrations.)
- *Missing Receipts* - If a receipt is lost or for the rare occasion when a receipt could not be obtained, the traveler should complete a Missing/Lost Receipt Form.
 - For missing corporate card receipts use this form:
https://finance.duke.edu/resources/forms_sec/CardMissing.doc
 - For lost reimbursement receipts, use this form:
https://finance.duke.edu/resources/forms_sec/LostReceipt.doc
- A copy of the request for travel approval document and any pre-travel corporate card forms and expenses.

4. Non-Allowable Travel Expenses

Duke's policy is to reimburse its travelers for all reasonable and necessary expenses incurred while transacting the affairs of Duke. However, there are specific types of expenses which are considered to be personal and are therefore not reimbursable or allowable on the corporate card. The following list is illustrative, and does not necessarily include all items considered to be personal expenses.

- Airline club membership fees
- Annual fees or late charges for personal credit cards
- Barbers, manicurist and shoe shine
- Personal cell phone monthly fees
- Expenses related to vacation or personal days taken before, during or after a business trip unless they resulted in the reduction of the total cost of the trip
- Golf fees, ski lift tickets, etc
- Frequent flyer upgrades

- Health club facilities
- Limousines
- Loss or theft of airline tickets
- Loss or theft of personal funds or property
- Medical expenses while traveling
- Mini-bar alcoholic refreshments
- In room video rentals
- "No show" charges for hotel or car rental services
- Optional travel or baggage insurance
- Parking tickets
- Traffic violations and court costs
- Towing charges
- Personal entertainment i.e., sporting events, theatre, etc
- Personal telephone calls except to report changes in schedule, or to talk with family members once a day (for a reasonable period of time)
- Personal reading materials i.e., magazines, newspapers, etc
- Pet care fees
- Rental car options such as LDW, PAI and liability insurance for domestic trips only
- Rental car upgrades to premium and luxury
- Repairs to personal vehicles damaged while on Duke business
- Saunas, massages
- Souvenirs or personal gifts
- Travelers check fees
- Tuxedo/evening gown rentals
- Expenses more than one year old without approval from the appropriate management center

4. Helpful Resources

Below you will find resources to assist you with travel related processes.

- Instructions on how to submit BIAC travel expenses online through the Duke@Work portal:
<http://wiki.biac.duke.edu/biac:travelpolicy>
- BIAC Travel Summary Form (Use this form to summarize all receipts from a trip):
http://wiki.biac.duke.edu/media/biac:biac_travel_summary_form.xls
- Duke Travel Policies: <http://finance.duke.edu/travel/>