

## TRAVEL POLICY CHARTS

### Purpose of Travel - State, Research Foundation, and UB Foundation

Travelers (employees and non-employees) are responsible to ensure that travel:

- Is in compliance with departmental requirements
- Is in compliance with this policy, which follows New York State, Research Foundation, and UB Foundation rules and regulations
- Is in compliance with sponsor requirements, when applicable
- Is conducive to achieving the objectives of the trip while balancing factors such as cost, time, and safety
- Has a direct relationship to the university or research project mission
- Includes documentation (e.g., conference agenda, letter, email, other documentation) regarding the purpose of travel

If an employee sustains a work-related injury while traveling, follow the procedures for filing an accident report detailed on the [Workers' Compensation webpage on the Administrative Services Gateway](#).

### Travel Definitions - State, Research Foundation, and UB Foundation

#### Cost Approver

Role assigned to individuals officially designated as authorized signatories on accounts.

#### Official Station

Is generally the address of the office to which the employee is assigned; an employee can have only one official station. The designation of official station is determined by the university in the best interest of the university and not for the convenience of the employee. The purpose of the official station is to determine when the traveler is in travel status and eligible for reimbursement of travel expenses. Travel between the employee's home and official station is considered commuting and is not reimbursable.

#### Supervisor

Role assigned to the individual officially designated as the employee's time and attendance supervisor. Generally, the supervisor is one level senior to the employee.

#### Traveler

Individual who travels on behalf of the university.

#### Travel Status

A traveler is in travel status (i.e., eligible for lodging and meals) when he or she is engaged in official university business at a distance of more than 35 miles from the designated official station and place of residence.

### Reimbursement Method - State, Research Foundation, and UB Foundation

Individuals submit an *Expense Report* to obtain reimbursement for travel expenses through the [Travel and Expense Reimbursement system](#).  
Travel-related forms are available on the [Administrative Services Gateway in the Forms Catalog](#).

### Expense Report Submission Time Limit - State, Research Foundation, and UB Foundation

The traveler should submit the *Expense Report* for processing within thirty days after the last day of travel.  
University fiscal year-end (June 30) reporting may require that *Expense Reports* be submitted less than thirty days after the last day of travel.  
*Expense Reports* submitted more than thirty days after the last day of travel may be treated as taxable and reported on the employee's W-2.  
The traveler must complete the *Policy Exception Request* when an *Expense Report* is submitted more than 120 days after the last day of travel.

### Supervisor and Cost Approval - State, Research Foundation, and UB Foundation

The traveler's supervisor must approve the traveler's *Expense Report*.  
Supervisor approval authority may be delegated only if the supervisor is unable to fulfill this responsibility as a result of extraordinary circumstances (e.g., extended vacation, disability leave, Family Medical Leave Act (FMLA), sabbatical).

The delegation of supervisor approval authority:

- Must be at the same professional level or one level up
- Must not allow an employee to approve the expenses of their supervisor

The traveler's supervisor reviews the *Expense Report* to verify that expenses:

- Are consistent with a pre-approved travel request
- Were incurred while conducting university business
- Are a prudent use of university funds

The *Expense Report* also requires cost approval. A supervisor may be a cost approver if they have signature authority on the account used for reimbursement. Cost approver delegation is not permitted. Cost approvers must have authorized security access in the travel and expense reimbursement system. The cost approver reviews the *Expense Report* to verify:

- The traveler's relationship to the account or grant
- That travel reimbursement is within allowable rates and all required documentation is included
- University travel rules and regulations are appropriate to the funding source

**Travel Payment Options - State, Research Foundation, and UB Foundation**

Travelers may pay for travel expenses with a personal credit card or UBF PCard.  
 Travelers must complete an *Expense Report* to obtain reimbursement through the [Travel and Expense Reimbursement system](#).  
 A [Procurement Card \(PCard\)](#) for the appropriate funding source may be used for allowable registration fees.  
 The university cannot advance or reimburse personal expenses or costs that will be paid by an outside funding source.

State	Research Foundation	UB Foundation
Expenses incurred prior to travel: <ul style="list-style-type: none"> <li>• Employees – submit an <i>Expense Report</i> to obtain reimbursement for airfare or room deposit prior to the trip.</li> <li>• Nonemployees (e.g., candidates, guest speakers, students) – departments use the <a href="#">Non-Employee Travel (NET) Card</a> for airfare or Amtrak expenses. NET Card expenses are billed directly to a department’s state account.</li> </ul>	Expenses incurred prior to travel: <ul style="list-style-type: none"> <li>• Travelers - submit an <i>Expense Report</i> to obtain reimbursement for airfare or room deposit prior to the trip.</li> <li>• Departments should use the <a href="#">Research Foundation Business Travel Account (BTA)</a> for airfare and Amtrak expenses. BTA expenses are billed directly to a Research Foundation award.</li> </ul>	Expenses incurred prior to travel: <ul style="list-style-type: none"> <li>• Departments should use the <a href="#">UBF PCard</a> or a <a href="#">Disbursement Request (DR)</a> to pay for airfare or room deposit.</li> </ul>

**Tax Exemption Guidance - State, Research Foundation, and UB Foundation**

Each state, funding source, and vendor may have different requirements for accepting tax exempt verification, therefore, it is possible that a particular transaction will not qualify for tax exempt status.  
 Tax exempt forms for New York State and other states are available on the [Administrative Services Gateway in the Forms Catalog](#).

State	Research Foundation	UB Foundation
When employees are traveling on state funds, NYS taxes are not reimbursable. This applies to sales tax, hotel occupancy taxes, and NYS taxes on car rentals and hotels. Travelers are advised to use the <a href="#">NYS Tax Exempt Certificate (AC946) and NYS Exemption Certificate for Tax on Occupancy of Hotel or Motel Rooms (ST 129) forms</a> .	When employees are traveling on RF funds, NYS taxes are not reimbursable. This applies to sales tax, hotel occupancy taxes, and NYS taxes on car rentals and hotels. Travelers are advised to use the <a href="#">Exempt Organization Tax Exempt Purchase Certificate for RF Funds (ST 119.1)</a> .	When employees are traveling on UBF funds, every effort should be made to obtain NYS tax exemption. If tax exemption is not possible, the reimbursement request must include an explanation. Travelers are encouraged to use the <a href="#">Tax Exempt Purchase Certificate for UBF Activities (ST 119.1)</a> .

## Meal Eligibility Requirements - State, Research Foundation, and UB Foundation

Eligibility for reimbursement for breakfast or dinner requires the traveler to be in travel status, and is determined by the time of departure from the traveler's official station or home and the time of return to the traveler's official station or home.

On the day of departure, the traveler is eligible for:

- Breakfast, if travel begins before 7:00 a.m.
- Dinner, if travel begins before 6:00 p.m.

On the day of return, the traveler is eligible for:

- Breakfast, if travel ends after 8:00 a.m.
- Dinner, if travel ends after 7:00 p.m.

Breakfast and dinner are reimbursable when they are not paid for or provided; lunch is not reimbursable.

When a breakfast, dinner, banquet, or buffet is included or provided, the meal is not reimbursable.

When a continental breakfast, reception, party, or cocktail party is included or provided, the meal may be reimbursed.

The meeting or conference agenda must be submitted with the *Expense Report* to verify the meals included.

Lodging and meal reimbursement may not be requested if you are staying in your personal residence. Your personal residence includes your home address as well as a remote residence that you own.

## Alcoholic Beverages

State and Research Foundation	UB Foundation
Reimbursement for alcoholic beverages is not allowed.	Per person reimbursement for alcoholic beverages is restricted to the lesser of the cost of two alcoholic beverages or \$15. Itemized receipt is required. Gratuities are limited to 20% of the pre-tax total bill. If per diem is applicable, the gratuity must be covered by the per diem maximum.

## Overnight Lodging and Meal Reimbursement - Receipted Lodging Method - State, Research Foundation, and UB Foundation

Two methods may be used for reimbursement of an overnight trip, *Receipted Lodging Method* and *Unreceipted Lodging Method*.

A single day of an overnight trip is defined as dinner, lodging, and breakfast the following morning. Travelers may not combine the two methods for the same day except when using UBF funds; however, both methods can be combined for the same trip.

Eligibility for reimbursement for lodging and meals requires the traveler to be in travel status and meet meal eligibility requirements.

### Receipted Lodging Method:

The Receipted Lodging Method provides reimbursement of actual lodging costs and an allowance for meals and incidentals based on federal reimbursement rates for the county of lodging. The per diem rates for locations within the continental United States (CONUS) are revised annually. Itemized receipts are required for lodging, but not for meals, when using this method.

When travelers attend a conference and the room rate exceeds the federal lodging per diem, documentation confirming the conference single room rate must be attached to the *Expense Report* to receive reimbursement at a rate greater than the federal lodging per diem.

Lodging per diems exclude taxes. Within New York State (NYS), employees must utilize the appropriate tax exempt form. Outside NYS, taxes are reimbursable. Tax exempt forms are available on the [Administrative Services Gateway in the Forms Catalog](#).

Each day the traveler is in overnight travel status, the traveler is eligible for reimbursement for lodging up to the maximum lodging per diem and a per diem allowance for meals. The meal per diem is for dinner and breakfast the following morning.

For UBF funds, reimbursement for lodging and meals is allowed for the amount of the actual receipt and is not limited to the federal per diem for lodging and meals. The actual receipt must be an itemized receipt.

Travelers are also eligible for a meal per diem for breakfast the first travel day and dinner the last travel day if they meet meal eligibility requirements. Breakfast or dinner may be reimbursed at the federal per diem for the area where lodging was obtained. The meal per diem is apportioned for breakfast and dinner and includes incidental expenses such as tips to restaurant servers, bellmen, porters, and hotel housekeeping.

Only the individual traveler may claim meal per diems.

Lodging and meal per diems may be accessed from the [Traveling for Business webpage](#).

## Overnight Lodging and Meal Reimbursement - Unreceipted Lodging Method - State, Research Foundation, and UB Foundation

There are two methods that may be used for reimbursement of an overnight trip, *Receipted Lodging Method* and *Unreceipted Lodging Method*. A single day of an overnight trip is defined as dinner, lodging, and breakfast the following morning. Travelers may not combine the two methods for the same day except when using UBF funds; however, both methods can be combined in the same trip.

Eligibility for reimbursement for lodging and meals requires the traveler to be in travel status and meet meal eligibility requirements.

### Unreceipted Lodging Method:

The Unreceipted Lodging method provides for a per diem rate for meals, lodging and incidental expenses regardless of where lodging is obtained, including lodging with relatives or friends. Rates are established based on the city or county where lodging is obtained or the location to which the employee is traveling (whichever rate is less), and the location must be indicated on the *Expense Report*. Receipts are not required when using this method.

Unreceipted lodging may not be combined with meal receipts for the evening that unreceipted lodging is claimed.

Meal Adjustment: When the traveler is in unreceipted overnight travel status but is not eligible for the full per diem (according to meal eligibility requirements), the traveler will receive the full per diem less the allowance for the meal(s). Likewise, if the traveler is entitled to an additional breakfast on the first day of travel or an additional dinner on the last day of travel (according to meal eligibility requirements), the traveler will receive the meal per diem.

The meal per diem includes incidental expenses including all tips to restaurant servers, bellmen, porters, and hotel housekeeping.

Lodging and meal reimbursement may not be requested if you are staying in your personal residence. Your personal residence includes your home address as well as a remote residence that you own.

### Unreceipted Lodging and Meal Per Diem Reimbursement Rates

Location	Lodging	Breakfast	Dinner	Full
New York City and Nassau, Suffolk, Rockland, and Westchester Counties	\$33.00	\$5.00	\$12.00	\$50.00
Cities of Albany, Binghamton, Buffalo, Rochester, Syracuse, and their surrounding areas (within 15 miles of these cities)	\$23.00	\$5.00	\$12.00	\$40.00
All other locations in New York State	\$18.00	\$5.00	\$12.00	\$35.00
Out of state (including tax)	\$33.00	\$5.00	\$12.00	\$50.00

## Non-Overnight Meal Reimbursement

State, Research Foundation, and UB Foundation	UB Foundation
<p>Travelers may be reimbursed for breakfast or dinner if they:</p> <ul style="list-style-type: none"><li>• Are in travel status (more than 35 miles from official station and place of residence); (Niagara Falls, NY; Niagara Falls, Canada; and Niagara-on-the-Lake, Canada are less than 35 miles from UB and do not meet the travel status requirement)</li><li>• Meet meal eligibility requirements</li><li>• Provide a meeting or conference agenda to verify if meals are included</li></ul> <p>Travelers with meal receipts are reimbursed up to the Meals and Incidental Expenses (M&amp;IE) per diem specific for the city and time of year of their travel location according to the federal rates. Alcoholic beverages are not reimbursable.</p> <p>The per diem rates may be accessed from the <a href="#">Traveling for Business webpage</a>.</p> <p>Travelers without meal receipts are reimbursed \$5.00 for breakfast and \$12.00 for dinner.</p> <p>The IRS considers all non-overnight meal reimbursements (i.e., meals incurred during day trips) to be taxable income. In order to meet this IRS requirement, UB withholds taxes from non-overnight meal reimbursements. Therefore, non-overnight meal reimbursements must be charged to the funding source that pays the employee.</p>	<p>Reimbursement is allowed for the actual receipt and is not limited to per diem rates. Cost should be modest and reasonable. An itemized receipt is required.</p> <p>Per person reimbursement for alcoholic beverages is restricted to the lesser of the cost of two alcoholic beverages or \$15. Itemized receipt is required.</p> <p>Gratuity is limited to 20% of the pre-tax total bill. If per diem is applicable, the gratuity must be covered by the per diem maximum.</p>

## Transportation – General - State, Research Foundation, and UB Foundation

Travelers should use the most efficient and cost effective method of transportation available. Often, this means using a common carrier such as an airplane, train, bus, taxicab, or ride sharing. The choice of transportation method must be in the best interest of the state, Research Foundation, UB Foundation, and sponsor. Employees should obtain the lowest cost coach-equivalent accommodations available. Consult with your unit business officer (UBO) to determine the most reasonable option, including the purchase of refundable tickets. Reimbursement for a refundable ticket may be allowed if this is the most reasonable and economical option to secure airfare. UBO approval is required when refundable or other than economy tickets are purchased. Transactions requesting payment to senior leadership (dean, vice president, provost, president) or that benefit an individual with approval authority, require approval by the next higher level of authority.

Direct routes must be chosen with consideration to time and cost, not convenience of the traveler.

Transportation expenses incurred from an employee's home to their official station are not reimbursable.

When a trip is cancelled:

- At the direction of the university, the traveler will not be responsible for costs incurred
- For the traveler's convenience, the traveler may be responsible for costs incurred

**Transportation – Airplane and Amtrak - State, Research Foundation, and UB Foundation**

Requests for airfare and Amtrak reimbursement must be made using an *Expense Report* and include proof of payment (i.e., receipt) and itinerary. This also applies to pre-travel airfare and Amtrak reimbursement requests.

When travelers choose to use their personally-owned vehicle for their convenience, instead of a common carrier, transportation expense reimbursement will be limited to an amount equal to the common carrier coach fare for the same route. A cost comparison between airfare and mileage must be included with the *Expense Report*. Information on how to prepare a cost comparison is available on the [Traveling for Business FAQs webpage](#).

Travel by Amtrak at a distance of over 200 miles one way may be purchased at the Business Class rate.

Reimbursement for reasonable and necessary baggage fees is allowable with a receipt.

State	Research Foundation	UB Foundation
<p>The <a href="#">Non-Employee Travel (NET) Card</a> should be used for airfare or Amtrak expenses for nonemployees (e.g., candidates, guest speakers, students). NET Card expenses are billed directly to a department’s state account.</p>	<p>The <a href="#">RF Business Travel Account (BTA)</a> should be used for airfare and Amtrak expenses for individuals traveling on behalf of the award. BTA expenses are billed directly to an RF award.</p> <p>All air travel on federally funded projects must comply with the <a href="#">Fly America Act</a>.</p> <p>When a trip is cancelled as a result of a public health emergency (e.g., Covid-19), non-refundable costs may be charged to an award if the costs would have otherwise been allowable and the sponsor guidelines related to the treatment of such costs are followed. Travelers should check with the sponsor for specific document requirements.</p>	<p>Individuals may use the <a href="#">UBF PCard</a> or <a href="#">Disbursement Request (DR)</a> to pay for airline or Amtrak expenses.</p>



**Transportation – Personal Vehicle - State, Research Foundation and UB Foundation**

A personal vehicle may be used for business-related travel when a UB-owned vehicle or common carrier is not available, is not cost effective, or is otherwise not appropriate. Justification to use a personal vehicle may be required prior to the trip.

All mileage reimbursements must have a specific purpose of travel indicated on the *Expense Report*. Statements such as “on official business,” “in the course of duties,” “to attend meetings,” are not acceptable. If the mileage is incurred on a regular basis, (e.g., school observations, obtaining research samples), a form letter may be attached to each mileage statement.

Mileage reimbursement rates are determined by the IRS. Charges for gasoline, maintenance, depreciation, insurance, other costs of operating a vehicle, and repairs for damage to the vehicle are included in the federal mileage allowance. The vehicle owner’s insurance is primary for damage to the vehicle(s) in the event of an accident.

Fines, towing charges, violations (e.g., traffic, speeding, parking), and auto club memberships are not reimbursable.

All reasonable and necessary parking and toll charges will be reimbursed whether paid in cash or with a personally-issued EZ Pass. UB may not establish an EZ Pass account for an employee’s personal car.

If an employee chooses to drive their personal vehicle when the cost of airfare is less expensive, only the equivalent cost of coach airfare is reimbursable. Full mileage amounts must be noted on the *Expense Report* and the coach airfare equivalent must be claimed as reimbursement. Documentation must be provided to support the coach amount.

Only the mileage incurred during the course of daily business for the distance greater than an employee’s normal commute to the employee’s official station can be claimed.

The odometer reading should be used as the official record of mileage in all instances of personal car mileage.

Car mileage is not reimbursable when a traveler uses another individual’s personal vehicle.

Departments and employees are encouraged to use Campus Mail for correspondence and the UB shuttle service in lieu of a personal vehicle to reduce travel expenditures and the impact on the environment.

State	Research Foundation	UB Foundation
Receipts are required for reimbursement of expenses associated with personal vehicle usage, such as tolls and parking.	Expenses for tolls, parking, taxis, ride sharing, and local bus, train or subway fares under \$75.00 may be reimbursed without a receipt. This applies per individual receipt and must be itemized on the <i>Expense Report</i> indicating the date, location, and amount claimed. A department or sponsor may require receipts for these expenses at its discretion.	Expenses for tolls, parking, taxis, ride sharing, and local bus, train or subway fares under \$75.00 may be reimbursed without a receipt. This applies per individual receipt and must be itemized on the <i>Expense Report</i> indicating the date, location, and amount claimed. A department or sponsor may require receipts for these expenses at its discretion.

**Transportation – Personal Vehicle Insurance - State, Research Foundation and UB Foundation**

**Vehicle Insurance Information While Traveling on University Business**

<b>Event</b>	<b>Driver’s Medical</b>	<b>Damage to Vehicle</b>	<b>Damage to Other Vehicle</b>	<b>Other Bodily Injury</b>
<b>Faculty or Staff driving their own vehicle</b>	<ul style="list-style-type: none"> <li>Workers’ Compensation (primary); WC will take a lien on No-fault insurance coverage (second);</li> <li>Personal health insurance (third)</li> </ul>	<ul style="list-style-type: none"> <li>Faculty or Staff personal auto insurance</li> </ul>	<ul style="list-style-type: none"> <li>Faculty or Staff personal auto insurance</li> </ul>	<ul style="list-style-type: none"> <li>No fault for medical bills; for liability Faculty or Staff personal auto insurance is primary</li> </ul>
<b>Faculty or Staff driving rental vehicle business paid with personal credit card</b>	<ul style="list-style-type: none"> <li>Workers’ Comp</li> <li>Rental car no-fault insurance</li> <li>No-fault under personal auto insurance</li> <li>Personal health insurance</li> </ul>	<ul style="list-style-type: none"> <li>CDW</li> <li>Campus</li> <li>UB contract with Enterprise, Hertz and National includes CDW for business rentals</li> </ul>	<ul style="list-style-type: none"> <li>Rental car insurance</li> <li>Personal auto insurance</li> </ul>	<ul style="list-style-type: none"> <li>Rental car insurance to \$25/50K limit (NYS) is primary</li> <li>Personal insurance</li> </ul>
<b>Faculty or Staff driving rental paid with purchase order</b>	<ul style="list-style-type: none"> <li>Workers’ Comp</li> <li>Rental car no-fault insurance</li> <li>Personal health insurance</li> </ul>	<ul style="list-style-type: none"> <li>Rental car insurance</li> <li>CDW</li> <li>Personal auto insurance</li> <li>Agency or campus</li> <li>UB contract with Enterprise, Hertz and National includes CDW for business rentals</li> </ul>	<ul style="list-style-type: none"> <li>Rental car insurance</li> <li>Personal auto insurance</li> </ul>	<ul style="list-style-type: none"> <li>Rental car insurance to \$25/50K limit (in NYS)</li> <li>Personal insurance</li> </ul>
<b>Student driving their own vehicle</b>	<ul style="list-style-type: none"> <li>No-fault up to \$50K</li> <li>Student health insurance</li> </ul>	<ul style="list-style-type: none"> <li>Collision on student auto insurance</li> <li>Third party auto insurance, if at fault</li> </ul>	<ul style="list-style-type: none"> <li>Student auto insurance</li> </ul>	<ul style="list-style-type: none"> <li>No fault of injured party for medical bills</li> <li>Student auto insurance</li> <li>Owner of vehicle’s insurance (if different)</li> </ul>
<b>Student driving rental vehicle paid with personal credit card</b>	<ul style="list-style-type: none"> <li>No fault under rental car insurance to \$25K</li> <li>No fault under personal auto insurance</li> <li>Personal health insurance</li> </ul>	<ul style="list-style-type: none"> <li>CDW</li> <li>Campus</li> </ul>	<ul style="list-style-type: none"> <li>Rental car insurance</li> <li>Personal auto insurance</li> </ul>	<ul style="list-style-type: none"> <li>Rental car insurance to \$25/50K limit (in NYS) is primary</li> <li>Personal insurance</li> </ul>
<b>Student driving rental vehicle paid with purchase order</b>	<ul style="list-style-type: none"> <li>Workers’ Comp (if employee)</li> <li>Rental car no-fault</li> <li>Personal health insurance</li> </ul>	<ul style="list-style-type: none"> <li>Rental car insurance</li> <li>Personal auto insurance</li> <li>Agency or campus</li> </ul>	<ul style="list-style-type: none"> <li>Rental car insurance</li> <li>Personal insurance</li> </ul>	<ul style="list-style-type: none"> <li>Rental car insurance to \$25/50K limit (in NYS)</li> <li>Personal insurance</li> </ul>

Additional claims for damage to the other vehicle or other bodily injury may be covered under [NYS Public Officers Law Section 17](#) or the non-owned vehicle coverage.

## Transportation - State Vehicle - State, Research Foundation and UB Foundation

The university does not have a pool of state vehicles for business travel.

## Transportation - Rental Vehicle - State, Research Foundation and UB Foundation

Rental vehicles may be used when it is in the best interest of the university, and is considered appropriate when:

- Renting is the least costly alternative
- Renting is the only method of transportation available
- Renting eliminates substantial delays

New York State (NYS) and the Research Foundation (RF) advise employees to rent vehicles in the name of New York State or the Research Foundation and sign the agreement as agent for the entity of which the employee is traveling. When using UBF funds for payment or reimbursement, rentals should be in the name of New York State. This is to assist in liability concerns, should an accident occur.

Reimbursable expenses include:

- Tolls (receipt required for state funded travel)
- Parking fees (receipt required for state-funded travel)
- Fuel when supported by a receipt
- Rental cost when supported by an itemized receipt
- Collision damage waiver (CDW) or loss damage waiver (LDW) if not included in the rental agreement or credit card program
- Global Positioning System (GPS) usage charges with a rental vehicle

Non-reimbursable expenses include:

- Personal Accident Insurance (PAI)
- Personal Effects Insurance (PEI)
- Liability Insurance
- Traffic fines and violations (e.g., speeding, illegal parking)
- Towing charges related to traffic violations (e.g., illegal parking)
- Transportation to personal meals

Car rental expenses incurred while attending a conference are usually not reimbursable. Low cost shuttles may be available at the airport for transportation to or from the hotel or conference site. If a shuttle is not available, a taxi or ride sharing is usually the next cost effective form of transportation between the airport and the hotel or conference site. When a car rental is necessary, justification, including a cost comparison, is required.

Every effort should be made to obtain tax exemption. NYS taxes are not reimbursable when state funds are used. NYS taxes may be reimbursable when using RF or UBF funds. View the tax exempt forms for [New York State and Other States](#).

### **Transportation - Rental Vehicle - State, Research Foundation and UB Foundation - continued**

Collision Damage Waiver (CDW) must be purchased if not included in the rental agreement or credit card program. If CDW is not obtained, any cost associated with damages to the rental vehicle may be the sole responsibility of the renter.

When an accident occurs, the traveler must report it to the rental agency and Travel Services immediately, and complete any reports required by the rental agency. In addition, contact the police to file a police accident report. Failure to comply with the requirements of the rental agency for reporting an accident or damage to the rental vehicle could result in the driver being held personally liable for any costs.

Insurance coverage purchased in the US is generally not recognized outside of the covered territories. Therefore, when traveling outside of the covered territories, it is necessary to purchase the appropriate insurance from the rental agency in the country where the vehicle is rented. It is recommended that the traveler purchase all of the insurance offered by the rental agency.

### **Miscellaneous Expenses - State, Research Foundation and UB Foundation**

Reimbursable expenses (receipt required) include:

- Taxi and ride sharing
- Telephone and Internet usage for university business
- Baggage fees
- Tolls
- Parking fees
- GPS usage charges with a rental vehicle
- Local bus, train, subway
- Foreign transaction fees

Non-reimbursable expenses include:

- Early bird check-in option fees (departmental discretion may allow reimbursement with UBF funds)
- Airline club membership
- Non-cash airline/hotel credits (e.g., frequent flyer mileage, traveler rewards, gift card)
- Upgrade seat charges
- Trip cancellation insurance (details below)
- Entertainment
- Speeding fines
- Parking tickets
- ATM fees
- Laundry (details below)

**Miscellaneous Expenses - State, Research Foundation and UB Foundation - continued**

State	Research Foundation	UB Foundation
<p>Trip cancellation insurance may be reimbursed when purchased for international travel.</p> <p>Written documentation and approval from the UBO is required. Transactions requesting payment to senior leadership (dean, vice president, provost, president) or that benefit an individual with approval authority, require approval by the next higher level of authority.</p> <p>Before purchasing trip insurance, review the policy terms; some policies will not cover direct or indirect losses stemming from a health epidemic.</p>	<p>Trip cancellation insurance may be reimbursed if it includes protection against changes in travel plans and is reasonably cost-beneficial.</p> <p>Written documentation and approval from the UBO is required. Transactions requesting payment to senior leadership (dean, vice president, provost, president) or that benefit an individual with approval authority, require approval by the next higher level of authority.</p> <p>Before purchasing trip insurance, review the policy terms; some policies will not cover direct or indirect losses stemming from a health epidemic.</p>	<p>Consult with your unit business officer (UBO) to determine if travel insurance is necessary and reimbursable.</p> <p>Written documentation and approval from the UBO is required. Transactions requesting payment to senior leadership (dean, vice president, provost, president) or that benefit an individual with approval authority, require approval by the next higher level of authority.</p>
<p>Laundry expenses for extended stay at international locations are reimbursable.</p>	<p>One personal phone call to a family member will be reimbursed. A receipt is required; the maximum reimbursement is \$10 per day.</p> <p>Expenses for tolls, parking, taxis, ride sharing and local bus, train or subway fares under \$75.00 may be reimbursed without a receipt. This applies per individual receipt and must be itemized on the <i>Expense Report</i> indicating the date, location, and amount claimed. A department or sponsor may require receipts for these expenses at its discretion.</p>	<p>Early bird check-in option fees are reimbursable at departmental discretion.</p> <p>Expenses for tolls, parking, taxis, ride sharing and local bus, train or subway fares under \$75.00 may be reimbursed without a receipt. This applies per individual receipt and must be itemized on the <i>Expense Report</i> indicating the date, location, and amount claimed. A department or sponsor may require receipts for these expenses at its discretion.</p>

### Personal Travel - State, Research Foundation and UB Foundation

When personal travel is combined with business travel or personal expenses are incurred while in business travel status:

- Reimbursement, advance, or payment is not permitted for personal expenses (e.g., hotel, transportation, meals, other personal incidentals)
- Car rental, airport parking, and other costs will be prorated to reimburse only the days the employee was on university business.
- Per diem meals begin or end at check in or check out of business lodging

If the cost of air travel includes additional stops to accommodate personal travel, a cost comparison must be provided to confirm that the cost of business and personal travel does not exceed the cost of business travel alone; the lesser of the two will be reimbursed.

When travelers choose to use their personally-owned vehicle for their convenience instead of a common carrier, transportation expense reimbursement will be limited to an amount equal to the common carrier coach fare for the same route. A cost comparison between airfare and mileage must be included with the *Expense Report*.

Information on how to prepare a cost comparison is available on the [Traveling for Business FAQs webpage](#).

### Conference Considerations - State, Research Foundation and UB Foundation

When the purpose of travel is to attend an event (e.g., conference, meeting, seminar, training), the brochure, agenda, or program is required to substantiate the:

- Business purpose of the travel
- Dates of the event
- Location of the event
- Meals provided

When meals and/or lodging are provided as part of a conference or event, additional reimbursement is not permitted. Meals that are not provided may be reimbursed in accordance with the meal eligibility requirements.

When travelers attend a conference and the room rate exceeds the federal lodging per diem, documentation confirming the conference single room rate must be attached to the *Expense Report* to receive reimbursement at a rate greater than the federal lodging per diem. UBF will provide reimbursement based on actual receipt; documentation confirming the single conference room rate is not required.

Car rental expenses incurred while attending a conference are usually not reimbursable. Low cost shuttles may be available at the airport for transportation to or from the hotel or conference site. If a shuttle is not available, a taxi or ride sharing is usually the next cost effective form of transportation between the airport and the hotel or conference site. When a car rental is necessary, a justification, including a cost comparison, is required.

The [UB Procurement Card \(PCard\)](#) or [UBF PCard](#) may be used for allowable registration fees.

Social activities (e.g., sightseeing, golf outings) are personal expenses and will not be reimbursed.

**International Travel - State, Research Foundation and UB Foundation**

Foreign per diem rates provide for lodging up to a maximum amount and an allowance for meals and incidental expenses, including taxes. The traveler is entitled to 20 percent of the foreign meal and incidental per diem for breakfast and 80 percent for dinner. The per diem rates may be accessed from the [Traveling for Business webpage](#).

Rental vehicle insurance purchased in the US is generally not recognized outside the covered territories. Therefore, when traveling outside the covered territories, travelers are advised to purchase all of the insurance offered by the rental agency in the country where the vehicle is rented.

All expenses must be converted to US dollars.

Travelers and administrators approving international travel are advised to review the:

- [US Department of State Travel Advisories website](#)
- [Provost Memo – New SUNY Policy on International Travel by Students](#)

State	Research Foundation	UB Foundation
Additional approvals are not required for international travel. However, individual departments may require Provost approval in advance of international travel.	Travel to a country with a US Department of State travel warning requires advance written approval from the provost. The traveler must provide a copy of this approval to Travel Services; Travel Services will notify RF Central. All air travel on federally-funded projects must comply with the <a href="#">Fly America Act</a> .	Additional approvals are not required for international travel. However, individual departments may require Provost approval in advance of international travel.

**International Travel – Medical Insurance - State, Research Foundation, and UB Foundation**

Medical insurance policy and identification numbers may be obtained by calling Travel Services.

Students must have the applicable insurance when traveling internationally.

State	Research Foundation	UB Foundation
Europ Assistance is available for SUNY faculty and staff.	GeoBlue/Frontier MedEx is available to individuals (other than independent contractors) traveling on official RF business.	Europ Assistance is available for SUNY faculty and staff.

International Travel - Miscellaneous Expenses		
State	Research Foundation	UB Foundation
Some expenses unique to foreign travel may be reimbursed if they are directly associated with and required for the specific trip including passport and visa fees, cost to convert currency, travelers' checks, laundry charges for extended stay, and departure taxes.	Only expenses specifically approved by the sponsor (e.g., lodging, meals, and transportation) will be reimbursed.	Some expenses unique to foreign travel may be reimbursed if they are directly associated with and required for the specific trip including passport and visa fees, cost to convert currency, travelers' checks, laundry charges for extended stay, and departure taxes.

Student, Guest, and Candidate Travel Reimbursement - State, Research Foundation and UB Foundation
<p>Travel expenses incurred by enrolled university students are reimbursable when such travel directly benefits the academic, research, service, or operational interests of the university. Reimbursable travel includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Participation, on behalf of the university, in academic competitions, conferences, or programs</li> <li>• Student recruitment</li> <li>• Travel required in the performance of university employment</li> </ul> <p>Guest and candidate travel expenses (e.g., transportation, lodging, meals) are allowable when directly related to the individual's time spent in Buffalo on UB business. All student, guest, and candidate travel expenses must be supported by receipts in accordance with this policy.</p>

State	Research Foundation	UB Foundation
<p>Reimbursement to candidates is allowed only when the individual resides more than 50 miles from the UB campus where the interview is scheduled.</p> <p>Reimbursement of spousal travel expenses is not allowed.</p> <p>Nonemployees (e.g., candidates, guest speakers, students) – Departments should use the <b>Non-Employee Travel (NET) Card</b> for airfare or Amtrak expenses. NET Card expenses are billed directly to a department's state account.</p>	<p>When non-employee (e.g., student, guest, candidate) travel is paid from an RF award, the direct relationship of the individual to the project must be identified.</p> <p>Spousal travel expenses may be reimbursed only when allowed by the sponsor and budgeted in the grant.</p> <p>Departments should use the <a href="#">Research Foundation Business Travel Account (BTA)</a> for airfare and Amtrak expenses. BTA expenses are billed directly to a Research Foundation award.</p> <p>All air travel on federally funded projects must comply with the <a href="#">Fly America Act</a>.</p>	<p>A candidate's spousal travel expenses may be reimbursed. The request for reimbursement must be approved by the unit business officer prior to making travel arrangements.</p> <p>Departments should use the <a href="#">UBF PCard</a> or a <a href="#">Disbursement Request (DR)</a>.</p>



## History – Travel Policy Charts

October 29, 2020 – Updated the charts to require the traveler to complete the *Policy Exception Request* when the *Expense Report* is submitted more than 120 days after the last day of travel.

June 22, 2020 – Updated the charts to clarify reimbursement of spousal travel expenses when part of student, guest, or candidate travel:

- State – reimbursement of spousal travel expenses is not allowed
- RF – spousal travel expenses may be reimbursed only when allowed by the sponsor and budgeted in the grant
- UBF - a candidate's spousal travel expenses may be reimbursed; the request for reimbursement must be approved by the unit business officer prior to making travel arrangements

March 31, 2020 – Updated the charts to specify that lodging and meal reimbursement may not be requested if you are staying in your personal residence. Your personal residence includes your home address as well as a remote residence that you own.

January 8, 2020 – Updated the charts to clarify that when employees are traveling on RF funds, NYS taxes are not reimbursable; this applies to sales tax, hotel occupancy taxes, and NYS taxes on car rentals and hotels.