

TRAVEL POLICY FOR THE U.S. SCIENCE SUPPORT PROGRAM OFFICE (USSSP)

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USSSP's policy is to provide travel arrangements that ensure the efficient operation of the organization while maximizing the comfort and effectiveness of the traveler. USSSP assumes responsibility for providing timely and accurate information to assist the traveler and to process reimbursements in a timely manner, consistent with university and government regulations. It is the responsibility of the traveler to obtain proper authorization, to maintain proper documentation of expenses, and to apply promptly for reimbursement.

IMPORTANT REMINDERS:

- **Confirm** your flights 24-48 hours prior to departure, especially when in a foreign country.
- If your travel is booked through Ultramar and you need travel assistance or have a travel-related emergency (i.e. cancelled flight, missed flight), **call the 24/7 toll-free numbers listed on your itinerary.**
- USSSP will reimburse the cost of travel purchased (i.e. airfare, deposits) or surcharges imposed due to cancellations or changes in travel arrangements **only when required for business needs.**

Travel Authorization

IODP expedition and meeting-related travel activities will be initiated by the USSSP Office. Prior to each expedition or meeting, participants will be contacted by USSSP with the activity announcement, instructions and guidelines for securing travel reservations, and instructions for filing expense reimbursements.

Air Transportation – General

Travelers are encouraged to contact the USSSP Logistics Coordinator, James Spencer (jspencer@ldeo.columbia.edu) to make flight arrangements. He can work directly with the LDEO-designated travel agency, Ultramar, to make reservations. Alternatively, travelers can contact Mr. Safder Paracha at Ultramar directly (lamont@ultramartravel.com). Ultramar's regular business hours are 8:30 am to 6:00 pm EST on weekdays, but the phone number (888-681-7821) is active 24 hours a day for emergencies. Ultramar is aware of Columbia University travel policies and will help select air carriers that conform to the policy, which speeds up reimbursement. Furthermore, Ultramar has access to discounts and preferential rates negotiated by the University. Finally, the agency can help access and maintain the appropriate documentation of expenses.

To the extent possible, the traveler should try to make travel arrangements as early as possible to assist in keeping costs to a minimum. Ultramar will assist with modifications

to an itinerary to accommodate the traveler; however, if the modifications are substantial, the traveler may be asked to arrange the travel on their own. If travel arrangements combine business travel with personal travel, the traveler must purchase the entire ticket and request reimbursement for the cost of the business-only travel itinerary. (Travelers will be able to immediately file for reimbursement of business-related costs in such cases.) This is for the traveler's protection in case a situation arises (e.g., a cancelled flight on the personal leg of a travel itinerary) in which the traveler is entitled to a refund; a refund can be issued to a traveler *only if the traveler paid for the ticket.*)

If a ticket is purchased independently of Ultramar, the traveler will be asked to document that the itinerary and fare paid were reasonable and appropriate. *Travelers who choose to arrange their travel independently of the USSSP Office or Ultramar should allow their itineraries to be reviewed by the USSSP Office before purchasing*, so that compliance with U.S. flag carrier policy and other Columbia University and government requirements can be confirmed. Failure to comply with these requirements could result in non-reimbursement.

In accordance with federal regulations for government-supported research activities, *USSSP can only support travel in coach or economy class.*

Unused Tickets: The traveler is responsible for notifying USSSP or Ultramar as early as possible if travel plans change or a portion of a ticket, including Amtrak tickets, goes unused. If a traveler does not travel for USSSP within a year of the original ticket's issue date, and uses any value or portion of the ticket for non-USSSP purposes, USSSP retains the right to seek reimbursement from the traveler.

Lost Tickets: The traveler is responsible for purchasing a replacement ticket and processing any lost ticket applications or forms with the airline and/or Amtrak.

Expedition-Related Travel

Shipboard expedition participants will typically be covered by USSSP for one night's stay in a hotel both before and after each expedition. If an expedition participant is delayed returning to port, the USSSP Office will assist in rearranging flight schedules, but can do so only if USSSP purchased the original airline ticket; the USSSP office will not be able to access a reservation that was not made through Ultramar. *Therefore, it is highly advisable to use Ultramar to arrange this travel.* If the ship arrives early in port at the end of an expedition, USSSP will do its best to arrange for an early departure; but please be advised that if early departures are costly to the program, shipboard participants may be required to fly on the originally scheduled itinerary. These types of occurrences will be addressed on a case-by-case basis.

Air Carrier Selection

Where government funds are utilized, all international travel must be booked on U.S.-flag air carriers unless the use of a U.S. flag air carrier would not accomplish the USSSP mission or a U.S. flag air carrier is considered unavailable. This includes any segment of the initial booking and any subsequent changes in routing while en-route. *Because these guidelines are complex, travelers are strongly advised to make their international travel reservations through Ultramar in order to insure compliance.* In each case when a flight is booked on a non-U.S. flag air carrier, USSSP must approve its use in advance. Failure to comply with this policy may result in non-reimbursement.

The US Flag Carrier Policy is available on the Columbia Research Administration website (<http://spa.columbia.edu/policies/us-flag-carrier-policy>). Exceptions to this requirement are listed in the policy.

Saturday Night Stay-Over

When it is deemed cost-effective, travelers will be permitted to extend a trip to include a Saturday night stay-over. For this to occur, the additional expenses incurred by the longer stay must be more than offset by the savings gained by using the Saturday night stay-over airfare when compared to the traveler's official schedule as determined by USSSP. Circumstances under which this would normally occur are when official business begins on Monday or ends on Friday. Pre-approval from USSSP is required.

Frequent Flyer Miles

Travelers may retain frequent flyer miles earned during business travel.

Airline Receipt Requirements

If a traveler purchases an airline ticket independently of Ultramar, travel documentation must include:

- the dates and points of departure and arrival
- the travel “class” (unless there is only one class of the airline, like Jet Blue)
- the total amount of the flight
- proof of payment

Allowable documents include: the original passenger ticket/receipt, boarding pass, e-ticket, online statement or confirmation, or itinerary issued by a travel agent or online travel service.

Lodging

USSSP will reimburse travelers for the cost of their rooms and any applicable taxes and fees when traveling on approved USSSP business. USSSP will determine the maximum number of lodging nights that are reimbursable, and these will be specified in the meeting and travel logistics message. For those not attending a meeting organized by USSSP, the maximum number of lodging nights will be the least required for the traveler to complete USSSP-supported activity, and to return to their point of origin. Prior approval must be received from USSSP if the maximum number of lodging nights is exceeded.

Itemized receipts for lodging are required. Individual allowable expenses on lodging bills, such as Internet charges, should be entered separately on the Travel Expense Report. Allowable lodging reimbursement will be based on a single occupancy rate. If, for personal convenience, a traveler interrupts or deviates from the official travel schedule or from the most direct and/or economical route, reimbursement of lodging expenses may not exceed that which would have been incurred for the uninterrupted travel or the un-deviated official travel schedule.

Meals

Meals will be reimbursed on a per diem basis according to the federally approved rates for the geographical destination travel point. The destination point is defined as the location where the official business will be conducted. An overnight stay is required for per diem to be claimed.

A meal per diem is a standard fixed amount per meal for which a traveler will be reimbursed during the conduct of business travel regardless of the actual expenses incurred. The per diem allowance in this policy is intended to cover expenses for meals, including tips to food servers and sales taxes as well as an incidental amount. Receipts are not required in order to claim per diem.

Meal and incidental (M&IE) per diem rates for the continental United States are obtained from the GSA (General Services Administration) and for other destinations from the U.S. Department of State: [Domestic Per Diem](#) and [International Per Diem](#), respectively. The M&IE per diem rate for travel days is reimbursed at 75% of the full rate for the traveler's destination. Domestic meal and incidental breakdown can be found [here](#), and international meal and incidental breakdown is given [here](#).

When a meal is furnished at a meeting location, the meal per diem should not be claimed for that particular meal. In addition, USSSP expects all travelers to conserve costs to the program by reducing per diem claimed if actual expenses incurred are lower than the per diem rate.

When, for a traveler's personal convenience, there is an interruption of travel or deviation from the official schedule or most direct/and or economical route, the per diem allowed

may not exceed that which would have been incurred for the uninterrupted travel or the un-deviated schedule.

Ground Transportation - Vehicle Rental

Travelers must request authorization from USSSP to rent a car prior to travel. Factors taken into consideration for granting the request include, but are not limited to: distance of travel to a final destination, availability of alternate ground transportation, time of travel, and other factors determined by USSSP. A receipt, including the rental agreement, for an automobile rental must be submitted with the Travel Expense Report.

Reimbursement for car rentals may be for compact or intermediate/mid-size classifications for individual travelers. If there is a need for a larger vehicle (e.g. multiple travelers), the cost of the rental will be reimbursed at the intermediate car class rate, unless justification is should be provided on the Travel Expense Report showing the need for a larger vehicle. Gasoline expenses purchased for the rental car will be reimbursed as miscellaneous travel expenses. Travelers must purchase the liability and physical damage insurance coverage offered in the rental contract. These insurance expenses are reimbursable.

Personal Vehicle

When traveling for business purposes, a personal vehicle may be used in order to save time, transport equipment, reduce costs when several people are traveling together, or travel to locations within reasonable driving distance. The expense of transportation by personally owned vehicles will be reimbursed on a mileage basis at a rate based on prevailing Internal Revenue Service (IRS) rates. The prevailing reimbursement rate will be indicated on the Travel Expense Report. Mileage reimbursement is based on travel by the most direct route between the departure and destination points.

The reimbursement of personally owned vehicle expenses will be provided to the extent that the costs of vehicle transportation and related travel expenses (en-route lodging, meals, miscellaneous expenses, parking fees and toll charges, etc.) are reasonable. In this instance, the traveler should notify the USSSP in advance. When requesting mileage reimbursement, address-to- address directions must be provided with the Travel Expense Report as documentation.

Parking Fees and Toll Charges

Parking fees and toll charges are reimbursable. Receipts are required for any single expense more than \$50.00.

Other Forms of Ground Transportation

Travelers will be reimbursed for bus, subway, or other mass transportation, shuttle, taxi fares, or private car service plus reasonable tips when necessary for business purposes. Reimbursement will be provided for transportation between hotels, railroad stations, airports, restaurants, workplaces or meetings. Taxi, bus, and train fares must be itemized on a Travel Expense Report. Limousine service will be used only when other practical means (i.e., train, bus, airport or hotel shuttle service) are not available or limousine service is more economical. Receipts are required for any single fare more than \$50.00.

Miscellaneous Expenses

Any single expenditure more than \$50.00 for allowable miscellaneous expenses must have a scanned or original receipt in order to be reimbursed, or a reason acceptable to USSSP explaining why the necessary receipt cannot be provided. (Expenses less than \$50.00 still need to be itemized on the Travel Expense Report and receipts provided if available.)

Miscellaneous allowable expenses include:

- 1) Gasoline for rental vehicles
- 2) With approval of the USSSP Director, registration fees for conferences and meetings
- 3) Laundry if on business in excess of 7 days in the U.S. (if on foreign travel, this is included in the incidental portion of M&IE)
- 4) ATM cash withdrawal fees
- 5) For international travel: currency conversion and traveler's check fees
- 6) Business communication expenses such as internet access, copying costs, business center charges
- 7) Airline change fees if itinerary changes are required for a work-related reason.

Unallowable expenses include:

- 1) Excess baggage costs related to personal property
- 2) Overweight baggage fees
- 3) Expenses related to vacation or personal days taken before, during, or after a business trip
- 4) Loss or theft of cash advance money or airline tickets
- 5) Loss or theft of personal funds or property
- 6) Lost baggage
- 7) Mini-bar alcoholic refreshments
- 8) Movies
- 9) "No show" charges for hotel or car service
- 10) Personal entertainment
- 11) Saunas, massages, spa visits
- 12) Snacks

- 13) Traffic fines
- 14) Additional cost for family members or others beyond the single room rate for lodging.

Reporting Requirements

The Internal Revenue Service requires travel expense reimbursements to be reported within a reasonable period of time. Travelers are required to submit a Travel Expense Report to the USSSP Office within thirty (30) calendar days following the completion of travel, including scans or original receipts for any items over \$50.00. This includes all receipts for airline tickets, car rental, itemized lodging expenses, and any miscellaneous expenses incurred by the traveler.

A receipt must identify:

- the date of purchase
- the vendor name
- itemized list and unit price of the purchased items
- the total amount

If the traveler is unable to obtain an original receipt that contains all the required information, documentation should be submitted to demonstrate as many of the required items as possible. A copy of the traveler's credit or debit card statement identifying the date, location and amount of the expense, or a rental agreement, may be submitted along with a description of the purchase, identifying the amount of any expenses to be segregated (i.e. alcohol). If proof of payment is submitted in this manner, please black out any private or unrelated information.

While receipts are not required for meals as government per diem rates are in place, per diem should still be itemized on the Travel Expense Report for reimbursement purposes.

For all receipts listed in foreign currency, the US dollar (USD) conversion amount and documented source of the conversion rate should be noted on the receipt. Please use Columbia University's preferred conversion source: <http://www.oanda.com/currency/converter/>. Reimbursements will be made in US dollars (USD).

For any questions about USSSP travel or reimbursement policies, please contact the USSSP Office (ussp@ldeo.columbia.edu).

For more information about Columbia University policies, the Columbia University Travel Expense Policy can be found [here](#).

Appendix A: USSSP Travel Expense Report instructions

Travelers must complete a Columbia Non-employee Travel Expense Report to receive reimbursement for USSSP-related travel. The Travel Expense Report, along with accompanying documentation of expenses, should be submitted to James Spencer at the USSSP Office (jspencer@ldeo.columbia.edu) via email within thirty (30) calendar days following the completion of travel.

To complete a USSSP Travel Expense Report, please perform the following steps:

- 1) Enter your name and the business purpose of your travel.
- 2) List each expense separately, in order of the date of expense, and segregate any unallowable expenses (e.g., alcohol) in Column B.
- 3) Include receipts for any items costing more than \$50.00.
- 4) Sign, scan and email the report with all receipts and documentation attached to the USSSP Office.

For expenses over \$50.00, documentation requirements are as follows:

- *For airline travel purchased independently of USSSP:* Scanned or original passenger ticket/receipt, boarding pass, e-ticket, online statement or confirmation, or itinerary issued by a travel agent or online travel service. Documentation must include dates and points of departure and arrival; travel “class”; total cost of flight; and proof of payment.
- *For rail/bus travel:* Scanned or original ticket, ticket stub or receipt for fare. Documentation must include dates and points of departure and arrival; travel class; total amount of fare; and proof of payment.
- *For rental cars:* Scanned or original receipt from the car rental agency. Documentation must include dates and points of rental; rental class; total cost; and proof of payment.
- *For travel in a personal vehicle:* Include address-to-address directions to document travel distance. The prevailing IRS mileage rate is given at the bottom of the Travel Expense Report form; please enter your personal vehicle expenses there.
- *For lodging:* Scanned or original itemized hotel bill. Documentation must include dates of arrival and departure; detailed charges; total cost; and proof of payment.
- *For meals:* The use of per diem for meals is preferred, and should be itemized on the Travel Expense Report for reimbursement purposes.
 - Per diem rates for the continental U.S. are obtained from the [GSA](#) and for other destinations from the [U.S. Department of State](#).
 - The per diem rate for travel days is reimbursed at 75% of the full rate for the traveler’s destination.
 - If meals are furnished at a meeting location or are included with other expenses (e.g., free breakfast at a hotel), the meal per diem should not be claimed for that meal. In addition, USSSP expects all travelers to conserve

costs to the program by reducing per diem claimed if actual expenses incurred are lower than the per diem rate.

If the traveler is unable to obtain an original receipt that contains all the required information, documentation should be submitted to demonstrate as many of the required items as possible. A copy of the traveler's credit or debit card statement identifying the date, location and amount of the expense, or a rental agreement, may be submitted along with a description of the purchase, identifying the amount of any expenses to be segregated (i.e., alcohol). If proof of payment is submitted in this manner, please black out any private or unrelated information.

Please consult the complete USSSP Travel Policy for a more detailed explanation of policy and guidelines.

If you have any questions, please contact James Spencer at the USSSP Office at 845-365-8785 or jspencer@ldeo.columbia.edu.

Appendix B: USSSP Travel Expense Report Form

NON-EMPLOYEE TRAVEL EXPENSE REPORT

Columbia University in the City of New York OFFICE OF THE CONTROLLER		PAYEE NAME	VENDOR ID #:	
BUSINESS PURPOSE: (Description of meeting, workshop, or expedition.)				
DESCRIPTION OF EXPENSES			UNSEGREGATED EXPENSES A	SEGREGATED EXPENSES B
EXPENSE NO.	DATE OF EXPENSE	DESCRIPTION OF EXPENSE		
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
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22				
23				
24				
25				
26				
27				
28				
29				
30				
	Rate 0.575	Personal Vehicle Mileage (# of miles)	Total for miles	
31				
32				
33				
34				
		TOTALS	\$0.00	\$0.00
PAYEE'S SIGNATURE			DATE	
X				
I certify that these expenses were actual and reasonable and incurred in accordance with University policy for the official business of Columbia University. I certify that no portion of this claim was free of charge, previously reimbursed from any other source, or will be paid from any resource in the future.				