

Harvard Travel Policy Summary – Updated February 2022

Travel expenses must be reasonable and necessary, and travelers must always use the most cost-effective means of travel. **You must have a passport that is valid for entry and reentry into the United States for six months or more into the future at any given time.**

Airfare: Travelers are expected to book the **lowest and most reasonable nonstop airfare** consistent with their itinerary, the business purpose of their trip, and the requirements of the funding source. Complimentary no-cost upgrades are allowed. All air travel on federal awards must comply with the [Fly America Act and use U.S. Flag Carriers](#) even when a less costly foreign flag carrier is available, unless the flight meets specific circumstances. To book travel with Harvard rates please choose [one of these agencies](#) or contact Christine Benoit christine.benoit@cfa.harvard.edu.

- The purchase of **first class air travel is not allowed.**
- **Business Class** is acceptable in limited circumstances such as when a trip has an **in-air flight time over six hours OUTSIDE of the contiguous 48 United States** or for Air Travel Involving an **international location OTHER THAN Canada and Mexico** in which case the lowest -priced non-stop business class if permitted by local policy and budget. No business class allowed on federal funds without [specific exceptions](#).
- Under extenuating circumstances, such as **documented medical reasons**, the purchase of business class or first class service may be reimbursable.
- **Upgrades** to any economy class fare (extra leg room, economy plus etc.) are NOT allowed on federal funds without specific exception approval
- **You are required to register all International Travel booked outside of Harvard agencies with the [Harvard Travel Registry](#)**

Airline fees

a. Reimbursable:

- 1 Baggage check fees: Harvard will reimburse employees for reasonable and necessary fees
- 2 Ticket cancellation fees and change fees: Harvard will reimburse any cancellation fees or change fees provided there is a **valid reason, such as a canceled conference or a medical emergency**, for the change or cancellation of the ticket. Authorized approvers must ensure any change or cancellation fees charged to sponsored funds are allowable.

b. Not reimbursable:

- 1 Lost or damaged baggage: Harvard will not reimburse travelers for personal items lost or damaged while traveling on business, nor will the University replace lost or damaged personal items. The traveler must address any such claims to the responsible airline.
- 2 Baggage insurance is not a reimbursable expense;
- 3 Airport airline club membership fees: airline club membership dues and similar programs are not reimbursable expenses.
- 4 Memberships or fees for priority boarding, expedited security screening or customs processing (Global Entry, PreCheck, Nexus, Sentri) are not reimbursable.

Ground Transportation - Where available, public transportation and shuttle services should be considered.

- 1 **Business use of personal cars:** Harvard reimburses **mileage up to the federal rates for business use** of personal cars, gas expenses cannot be reimbursed. Travelers must ensure personal cars used for business use have appropriate insurance. When traveling long distance to a business destination where flying would be an option, the mileage reimbursement amount cannot exceed the lowest airfare. When traveling from home to the airport on a business trip, a traveler may use a personal car and request mileage reimbursement if the cost of taxi services exceeds the total cost of the mileage, tolls, and parking combined.
- 2 **Rental cars:** travelers must only rent cars for business use when it is the most cost-effective or practical means of travel. **Travelers must rent the most economical vehicle consistent with business needs and travel circumstances (usually a compact or mid-size), and must not exceed a full-size vehicle.** Travelers should rent cars through Harvard preferred vendors, which include insurance coverage. Fifteen passenger vans are not permitted for safety concerns. Harvard has [negotiated discounts](#) with Enterprise/National (XZHARVB) and Hertz (CDP -31570) that include [some insurance](#).

Harvard Travel Policy Summary – Updated February 2022

- 3 Private sedan or car services** should be used only when valid business reasons preclude the use of more economical transportation. The use of private sedan or car services to attend meetings on or around campus is prohibited. Harvard will NOT reimburse for limousine expenses under any circumstances. “UberBLACK” is considered a car service however the other Uber offerings are considered taxi services.
- 4 Rail travel:** expected to be at the lowest fare that offers reserved seating. For rail travel over six hours, first-class seating is reimbursable.

Lodging: the University will reimburse travelers for lodging expenses while on official University business further than 50 miles one way from the traveler’s place of work. Travelers are expected to stay in **standard, single-occupancy rooms where available**; room-upgrade fees are not reimbursable. Harvard will not reimburse travelers for cancellation or “no-show” charges. To book hotels with Harvard negotiated rates please visit the [Harvard Travel Portal](#) or contact Christine Benoit christine.benoit@cfa.harvard.edu.

- Internet connection fees: Harvard will reimburse for reasonable internet connectivity fees.
- In-room movies and similar charges: the University will **not** reimburse travelers for personal expenses, such as, but not limited to, in-room video rentals/movies in-room alcoholic beverages, and recreational charges (such as golf fees or exercise- room/health-club fees).
- Hotel frequent guest programs: Harvard CANNOT reimburse travelers for rooms purchased with frequent-guest-program credits.
- **Rental accommodations:** travelers may stay in rental accommodations only if the total cost of the rental is less expensive than the total cost of the required hotel stay in a standard, single-occupancy room.

Meals, entertainment and miscellaneous travel expenses:

- 1 Individual meals:** travelers will be reimbursed for reasonable individual meal expenses while on University business. Per IRS regulations, the University does not reimburse individual meal expenses for one-day travel except when the travel time is greater than 12 hours. **Itemized receipts are required (including expenses under \$75).**
- 2 Business meals:** if a traveler hosts others at a business meal, the traveler must document each attendee’s name (if fewer than five guests; otherwise list total number of guests), connection to Harvard and the business conducted during the meal. **Itemized receipts are required (including expenses under \$75).**
- 3 Trip cancellation insurance:** trip cancellation insurance may be reimbursed on nonfederal funds if it is approved **in advance** and is for a **compelling business reason**. Travelers are cautioned that trip cancellation insurance does not necessarily provide coverage in all situations; purchasing a refundable ticket may be more appropriate for certain scenarios.

Personal Funds: travelers without access to a Travel and Entertainment Card (students, non- employees, and employees who may travel too infrequently to apply for a Travel and Entertainment Card) may use personal cash or a personal credit card to pay for travel expenses. The traveler can be reimbursed for these expenses **AFTER the trip has occurred** and upon presentation of appropriate documentation.

Combining business with personal travel: generally, business trips should have more days spent on business activities than personal activities. However, in certain circumstances, a business-related primary motivation for the trip may be more determinative than the relative number of days.

Spousal/family member travel: expenses related to an employee’s spouse or other family members are not reimbursable unless there is a bona fide business purpose for their presence on the trip.

Alcohol: all purchases of alcohol at business meals – even if not charged to federal funds – should be charged to object code 8450, Expenses Ineligible for Federal Reimbursement. For this reason, itemized receipts for all business meals that include alcohol regardless of amount are required. Alcohol at business meals cannot be charged to federal funds. **Reimbursement for alcohol related to business meals and other events should be limited to beer and wine purchases only.**

Use of University tax exemption: note that individuals who use a personal payment mechanism (for example, their own cash or a personal credit card) to make a purchase on behalf of the University CANNOT use the University’s sales or meals tax exemption. For Harvard’s sales tax exemption to be valid, Harvard must make the entire purchase directly.

Non-resident aliens: The NRA Tax group must review all reimbursement requests payable to non- resident aliens prior to payment, to

Harvard Travel Policy Summary – Updated February 2022

ensure the expenses are reimbursable under IRS and Department of Homeland Security regulations.

Reimbursement Requirements

Reimbursee signature: the traveler/reimbursee must sign all their reimbursement receipt reports (electronically in Concur) or expense form ([non-employee forms available online](#)).

Timeliness of reporting requirements: Standard (not extended) business trips: regardless of the method used to pay for travel, Central must receive completed employee receipt reports within 60 days of the end date of the trip. For Harvard Employees, reimbursements received between 90 and 182 days will be processed as additional pay (taxed) and reimbursements turned in after 182 days cannot be processed for reimbursement per the IRS Accountable Plan.

Receipt Requirements: In addition to the signature – the following documentation is required:

- a. If travel to a conference, a copy of the conference description which shows the dates, purpose, fees and meals provided
- b. A valid flight receipt that includes the travelers name, a ticket number, amount paid, flight itinerary, commercial carrier name, fare code and charges.
- c. Any vehicle rental receipt
- d. A complete lodging receipt (usually called hotel folios) regardless of amount
- e. All receipts regardless of dollar amount must be turned in.
- f. Business meals: if a reimbursee hosts others at a business meal, the reimbursee must document each attendee's name (if fewer than five guests; otherwise list total number of guests), connection to Harvard and the business conducted during the meal in addition to the date and location. **Itemized receipts are required.**
- g. Original receipts are strongly encouraged, scans/images are acceptable if originals are not available.

Substantiation: each reimbursement request for business expenses must be supported by a detailed business purpose that includes the following information:

- a. **Who** traveled or attended the event (e.g., all guests who attended a business-related meal)
- b. **What** type of event or activity was attended or purchase made
- c. **When** the event or activity took place
- d. **Where** the event or activity took place
- e. **Why** the expense was incurred