Travel Guidelines

The University at Buffalo will reimburse individuals for reasonable, necessary, appropriate, and approved travel and business expenses incurred in the performance of University business.

All travel must:
- be in compliance with the rates and regulations listed below.
- be in compliance with any additional sponsor guidelines
- include documentation regarding the purpose of travel - online versions of documents are acceptable
- have a direct relationship to the University or research project’s mission.
- be conducive to achieving the objectives of the trip while balancing factors such as cost, time and safety

If the purpose of travel is to attend a conference, the conference brochure, agenda, or program is required.
If the purpose of travel is something other than attending a conference, a letter, email, agenda, or other documentation regarding the purpose of travel is required to obtain reimbursement.

Transportation from an employee’s home to the official station is not allowed.

Purpose and Procedures for Travel when utilizing State or Research Foundation funds
An employee is in travel status when the employee is engaged in official University business at a distance of more than 35 miles from the designated official station and place of residence. Traveler must be away for more than 3 hours. An employee is only eligible for meal and/or lodging reimbursement when they are in travel status. Expenditures incurred while in travel status are reviewed and reimbursed, when applicable, per UB’s travel policy. An agenda, program or other documentation is required to substantiate all travel expenses.

Airfare and Amtrak
- Airfare and Amtrak expenses may be purchased via a personal credit card and reimbursed when the itinerary and receipt are provided.
- Documentation as to the official University Business conducted while traveling must be provided to support the days in which the air or train travel encompass.
- Only coach fare is reimbursable.
- Original boarding passes should be retained and attached to department copy of the travel voucher.
- RF funded air and Amtrak travel may be purchased using the American Express Business Travel Account (BTA).
- Airfare cost comparison may be necessary to justify method of transportation, times of travel, or if personal travel is combined with business travel

Conference Travel
- The University’s preferred and most efficient method of payment for conference registration is the Procurement Card.
- When attending a conference and staying at a conference hotel, the conference hotel single room rate must be documented to allow reimbursement of costs in excess of the per diem.
- When attending a conference and staying at a conference hotel, car rentals are normally not allowable as shuttles and taxis are usually more cost effective. Transportation is not reimbursable to and from personal meals.
- If meals are included or provided, they will not be reimbursed. Reimbursement is not provided for lunch.
- Registration fees cannot be advanced.

Mileage
- Mileage reimbursement is based on current IRS rate.
- Statement of automobile travel (form AC160) must be completed and attached to the travel voucher when utilizing State funds.
- Actual purpose of travel must be documented. (“on official business” or “in relation to duties” are not acceptable)
- The employee’s (vehicle owners) insurance is primary in the event of an accident.
- Mileage reimbursement from the employee’s home to the official station is not allowed.

Auto Rental
- CDW Insurance (Collision Damage Waiver) must be purchased (and will be reimbursed) to ensure proper coverage and liability. No other insurance is required nor will be reimbursed.
- CDW is included within UB’s Bank of America Individually billed corporate liability travel card.
- The employee (drivers) insurance may be utilized if claim amounts against the car rental insurance coverage is exceeded.
• In case of any damages or accidents, claims must be filed immediately, not to exceed 20 days.
• Rent in the name of New York State or the Research Foundation and sign the agreement as agent for the appropriate entity.
• When attending a conference and staying at a conference hotel, car rentals are normally not allowable.
• Original gasoline receipts are required when claiming reimbursement with use of a car rental or State vehicle.

**Taxi/Parking/Tolls**
• Reimbursed at actual amount incurred with original receipt (see receipts/other for further detail).
• Taxi costs are not reimbursable to and from personal meals.

**Meals**
• On the day of departure, the traveler is eligible for breakfast if departure occurs before 7am.
• On the day of return, the traveler is eligible for dinner if they arrive after 7pm.
• There are six meal rates, based on destination as detailed in the current federal per diem rate schedule and must be supported by a lodging or meal receipt. More information on per diems can be found in the Travel per diem webpage of the UBBusiness website.
• If meals are included in a conference, they will not be reimbursed. Reimbursement is not provided for lunch.
• The per diem includes tips to bellman, hotel maids, etc.

**Lodging**
• Lodging is paid on a personal credit card and reimbursement depends on the destination with rates established within the current federal per diem schedule.
• When attending a conference and staying at a conference hotel, the conference hotel single rate must be documented to be reimbursed in excess of the per diem.
• Business calls and internet use must be documented on the hotel bill. Personal expenses such as pay TV, movies, and laundry are not allowed.

**Receipts/Other**
• Foreign travel requires prior review of federal export controls.
• RF funded trips to travel on the US Dept of State warning list require Provost approval.
• RF funded trips must take place during the award period and comply with all sponsor guidelines.
• Original receipts are required.
• Tolls, parking, taxis and local bus or train fares under $75.00 may be submitted without a receipt. This applies per individual receipt and travelers need to itemize each expense on the travel voucher indicating the date, time, location, and amount claimed. Departments may require receipts for these expenses at their discretion.
• When attending a conference or seminar, the brochure or agenda is required. In all instances an agenda, program or other documentation is required to substantiate all travel expenses and all days travel expenses are claimed.
• The University’s preferred method for payment of conference registration is the Procurement Card.
• Use of the Tax Exempt Certificate is encouraged. NYS sales tax is not reimbursed.
• Original signatures of traveler, PI or supervisor and approval authority (when applicable) are required.
• When a portion of the travel expenses are paid by another funding source (i.e. UBF, conference organizer), information must be included on the voucher.

**Best Practices for Travel**
• The University’s preferred method for payment of conference registration is the Procurement Card.
• All expenditures should be submitted within two weeks of the traveler’s return date.
• All travel must:
  o be in compliance with UB, State, Research Foundation and/or Sponsor policy
  o include documentation regarding the purpose of travel - online versions of document are acceptable.
  o have a direct relationship to the University or Projects mission.
• If the purpose of travel is to attend a conference, the conference brochure, agenda, or program is required. If the purpose of travel is something other than attending a conference, a letter, e-mail, agenda or other documentation regarding the purpose of travel is required to obtain reimbursement.
• Transportation from an employee’s home to the official station is not allowed.
SIRI Information for Travel

- Travel expenditures appear in the OTPS tab on the Money dashboard or in the State or RF payments tab on the Procurement dashboard.

Travel forms

- Travel reimbursement vouchers, tax exemption certificates, CTA authorization forms, traveler profile requests and all other travel forms are on our website.

Travel contacts

- Travel office contact information including email addresses and phone numbers are on our website.