

## **2355 TRAVEL AND ENTERTAINMENT REIMBURSEMENT POLICY- AIR TRAVEL**

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**RESP. OFFICE: PURCHASING SERVICES**  
**APPROVAL: CHIEF PROCUREMENT OFFICER**  
**EFFECTIVE: MAY 1, 2009**  
**LAST REVIEW/REVISION: MAY 1, 2009**

### **PURPOSE**

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To provide travel guidelines with regard to the procurement of airline tickets when traveling on behalf of the University.

Other policies are provided for specific travel and entertainment (T&E) topics in the policy number series 2351 through 2370 and are listed at 2351.1 Travel and Entertainment Reimbursement- Detail Listing.

### **SCOPE**

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The T&E policies and procedures apply to all individuals, including employees, students, and non-employees, traveling and entertaining on behalf of the University and seeking reimbursement for related expenses from the University regardless of the funding source.

### **TRAVELER AND ENTERTAINER RESPONSIBILITY**

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It is the responsibility of Penn travelers to book the lowest logical airfare on Penn's preferred carriers (when applicable) consistent with their itinerary, the business purpose of their trip and the requirements of the funding source. Travelers should strive to be as flexible as possible and to make their travel plans as early as possible, thus taking advantage of advance purchase fares.

### **RESPONSIBILITY OF APPROVERS**

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The TAC (Transaction Authorization Card) holder assists the travelers and entertainers, as well as their higher level approver, when applicable, with understanding and complying with the process outlined below and ensures that all documentation requirements have been met prior to submission of reimbursement requests to the central processing organization.

The TAC holder is also responsible to monitor ticket usage to ensure that trips are actually taken and tickets are used.

### **POLICY**

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The mode of air travel is expected to be the least costly option consistent with the itinerary and particular University business involved. On federally funded projects the Fly America Act takes precedence over a less expensive foreign carrier.

- 1) Coach accommodations should be used at all times and travelers are expected to take advantage of advance purchase rates and the University's negotiated discounts.
- 2) Business or first class travel will not be reimbursed or allowed on the airline billing account unless approved by the head of the school or center (or their designated representative). Business class on sponsored research must also meet the strict guidelines stated under the Fly America Act ([Federal Travel Regulations](#), §Part 301-10) and be documented for audit purposes.
- 3) Full coach fares that allow upgrade opportunities are unacceptable if a lower fare was available. Upgrades at the expense of the University are not permitted.
- 4) If an employee elects to fly business and/or first class and agrees to pay the difference between the two fares, the difference will be calculated from the least expensive logical airfare on that particular routing as determined by the Travel Administrator.
- 5) Employee participation in frequent flyer programs must not influence flight selection which would result in incremental costs to the University beyond the lowest logical airfare.
  - a) The University **will not** reimburse travelers for tickets purchased with frequent flyer miles.
- 6) Air transportation is restricted to regularly scheduled and certified airlines. Air charter or air taxi services licensed by the U.S. Government, aircraft of major recognized corporations or private aircraft may be used when required by the urgency of a situation.
  - a) The number of key personnel who are permitted to travel on the same aircraft should be limited. It is the responsibility of each Dean, Resource Center Director, Vice President or Vice Provost to specify for their school or center the key personnel who may not travel on the same aircraft.
  - b) An employee electing to travel on a charter or private plane will only be reimbursed for an amount no more than the lowest logical commercial airfare on that routing and must provide documentation for the actual cost of the charter or private plane.

When traveling internationally on federally sponsored projects, a United States flag carrier must be used. For specific federal guidelines on this issue, click here on the [Fly America Act \(Federal Travel Regulations, §Part 301-10\)](#) for details. Any questions regarding foreign travel on federally sponsored projects should be directed to Research Services.

- 7) When a trip has been cancelled after a non-refundable ticket has been issued, the ticket can be applied to a trip in the future by that traveler on that airline less a change or cancellation fee. Travelers must apply any unused ticket value towards a business trip in the future, to mitigate any financial loss to the funding source. In most cases the traveler has a year during which that ticket can be applied towards a new ticket.
- 8) When a trip has been cancelled after a non-penalty ticket has been issued, the ticket must be submitted for refund. If the traveler has already been reimbursed for this prepaid expense, the traveler must return the money to the University once they have received the refund from the airline.
- 9) The University will not absorb any of the costs associated with the loss of a ticket unless special circumstances are documented in writing by the traveler on a Reimbursement Justification form approved by the head of the school or center (or their designed representative). Upon discovery of a lost/stolen ticket, the traveler must immediately request and file a lost ticket application with the airline.

[Click here](#) for Chapter 4 in the Procedure Manual. How to Complete a T&E Reimbursement (C-1) form.