
2354 – TRAVEL AND ENTERTAINMENT POLICY – AIR TRAVEL

Resp. Office: Purchasing Services
Approval: Executive Director, Purchasing Services
Effective: April 1, 2015
Last Revision: November, 2018
Last Review: April, 2018

PURPOSE

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

SCOPE

This policy applies to all faculty, staff, students and postdocs traveling and entertaining on behalf of the University and seeking reimbursement for related expenses from the University regardless of the funding source.

FACULTY, STAFF, STUDENT, POSTDOC RESPONSIBILITY

It is the responsibility of Penn travelers to book the lowest and most reasonable airfare through 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.

Full responsibilities of faculty, staff, students and postdocs can be found in Policy #2352.

RESPONSIBILITY OF APPROVERS

Approvers perform a critical control function for the University. Collectively, approvers ensure that expense reports processed for payment are complete, appropriately funded, compliant with policy and are associated with activities that have a valid and necessary business purpose. Designated approvers should assist individuals, as necessary, with understanding applicable policies and compliance requirements.

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

Full responsibilities of approvers can be found in Policy #2352.

POLICY

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, compliance with the Fly America Act (<https://www.gsa.gov/policy-regulations/policy/travel-management-policy/fly-america-act>) takes precedence over choosing 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. Upgrades in coach class such as Economy Plus seating are considered a personal expense unless approved in advance by School/Center administration.
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 a 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. A traveler may elect to upgrade to Business or First Class if he/she agrees to personally pay the difference in airfare from the least expensive airfare on that particular routing, which may be confirmed by Concur-TEM.
5. Traveler participation in frequent flyer programs must not influence flight selection, which would result in additional costs to the University from the lowest airfare. 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 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 to determine appropriate key personnel, who may or 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 greater than the lowest commercial airfare on that routing and must provide documentation for the actual cost of the charter or private plane.
 - c) When traveling internationally on federally sponsored projects, a United States flag carrier must be used. For specific federal guidelines on this issue, please refer to 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 the Office of 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 toward a business trip in the future, to mitigate any financial loss to the funding source. In most cases the traveler has a year in which that ticket can be applied toward a new ticket.
8. When a trip has been cancelled without any penalty, 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 the Concur-TEM system and 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.