
2356 – TRAVEL AND ENTERTAINMENT POLICY – LODGING

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

PURPOSE

To provide travel guidelines with regard to the procurement of lodging and accommodations when traveling on behalf of the University.

SCOPE

This policy applies to the procurement of lodging by and for 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 seek lodging that is safe, comfortable and reasonably priced. Travelers should take advantage of negotiated rates, conference rates, Web rates, Penn rates or educational rates when seeking hotel accommodations. Information for preferred travel service vendors is available at the following site: <http://cms.business-services.upenn.edu/penntavel/preferred-vendors.html>.

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.

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

POLICY

The cost of lodging should be kept at a minimum by requesting standard room accommodations whenever possible. Penn travelers are strongly encouraged to use standard accommodations at reasonably priced mid-market hotels or motels. Requests should be made for Penn discounts, educational discounts or other special rates to obtain the best price. Itemized hotel receipts, along with itemized expense entry in the Concur-TEM expense system, are required for reimbursement. The University generally does not approve accommodations at upscale or luxury hotels (Ritz, Four Seasons, etc.). However, an exception is made when a conference, workshop or other University business is scheduled at a luxury or upscale hotel. When traveling to any of these events, it is considered appropriate to stay at one of the hotels hosting the conference, even if the rate may exceed the guideline.

Legitimate lodging expenses include:

- Single room rate unless traveling with a colleague;
- Business telephone calls (use of Verizon calling cards is encouraged to reduce the cost of long distance calls from hotel rooms) (see Policy #2361);
- Reasonable number of calls to home; and
- Luggage storage and tips for service.

(1) The University will not reimburse travelers for the following expenses:

- In-room video rentals;
- In-room alcoholic beverages;
- Alcoholic beverages not purchased in conjunction with necessary business entertainment;
- Health club or exercise room fees;
- Recreational charges such as golf, tennis and ski lift tickets;
- Laundry and dry cleaning charges (unless traveling for more than five days); and/or
- Costs incurred for failure to cancel hotel reservations unless the head of the School or Center (or a designated representative) approves the expense.

(2) If a traveler elects to stay at a private residence, the traveler may be reimbursed for a small gift or meal extended (in lieu of lodging) as a gesture of appreciation to friends and relatives for their hospitality.

(3) Lodging reimbursement must be requested with actual costs. Per diems may not be used for lodging.

(4) When making reservations for visitors to Penn, departments are encouraged to use Penn's preferred hotels on campus and in Philadelphia.

