

## Guidance for Travel on Sponsored Funds

### *Overview and Key Concepts*

When utilizing sponsored funds to pay for travel, there are many issues to consider in addition to the WashU travel policy. Sponsored Projects Accounting (SPA) reviews travel submitted via Expense Reports in Workday (WD) for compliance with the WashU Travel policy as well as the applicable agency and federal guidelines. This document is meant to be a reference for charging travel to sponsored funds.

## Guidelines

### GENERAL TRAVEL ITEMS

- Travel on sponsored funds should be tied to the overall aims of the project. Per the Uniform Guidance, for federal funds, participation of the individual must be necessary to the federal award being charged and the costs must be reasonable and consistent with the non-federal entity's established travel policy (see UG 200.474 travel costs). Travel charged to sponsored projects should not be for professional development (i.e. travel to conferences that benefit the general knowledge base of the individual in their professional area of expertise but not necessarily benefiting a specific aim of a specific project).
- Personal travel must not be charged to a sponsored project and should be separately and specifically accounted for to ensure that only the business-related portions of a trip are charged to the sponsored project.
- Alcohol is not allowable on sponsored projects.
- An Expense Report should be used to reimburse WashU faculty/staff for travel expenses (airline tickets, room deposits...) that are paid in advance by the WashU employee. A Supplier Invoice Request may be utilized to pay vendors directly for registration fees or deposits if it is being made payable directly to the vendor (note: requires the vendor to be established as a supplier in WD).
- Foreign exchange rates are maintained in WD. You can modify the currency on the expense report and WD will convert it to US dollars. All receipts must be clearly labeled in English (i.e. hotel, rental car, taxi, food). If the original receipt is in another language, a translation of the expense type into English must be provided to ensure proper review and grant compliance.

### MEALS

- Individual meal charges over \$50 appear to be excessive on a sponsored project. If the cost of one

meal exceeds this amount, the sponsored project should be charged the \$50 and the remaining amount may be reimbursed from other funding sources, per the department's policies. In certain instances, the traveler may provide, and Sponsored Projects Accounting will consider, a written justification as to why the entire amount should be allowed.

- When including meals for individuals other than the traveler, the names of the individuals as well as the relationship to the grant should be well documented with justification for how the individual relates to the grant and why the meal should be charged to the grant.

## RENTAL CAR

- Rental car upgrades and auto insurance purchased from the rental company are normally not allowed on sponsored projects. If appropriate, provide justification as to why an upgrade is necessary. WashU Employees and students traveling for University business are covered when renting a car under the University's Insurance Policy; therefore, additional auto insurance should be declined. See Insurance website for details: <https://financialservices.wustl.edu/wfin-topic/insurance-risk-management/>. Non-WU Employees are not covered under our insurance policy and may elect to purchase rental car insurance.
- International Note – when traveling outside of the USA and Canada it is recommended that WU travelers purchase the rental car insurance. International (defined as outside the United States, Canada, and U.S. territories) rental car insurance is allowable to charge on a sponsored fund

## AIRFARE

- Seek economy or coach class fares, including unrestricted economy fares. WashU defines lowest unrestricted economy class airfare (sometimes called coach, standard economy fare class or base airfare) to include a reserved seat, one personal item, one carry-on bag, and one checked bag. Upgrades for premium seat choices are not allowed to be direct charged sponsored projects.
- Use screen prints to document a situation in which you must book a flight that is NOT in compliance with the travel policy. Situations included but are not limited to:
  - Flights not in compliance with Fly America Act
  - Purchasing upgraded airfare (for both WashU and non-WashU employees and participants)
  - Itineraries that include extended travel days and/or include additional destinations
  - Travel other than by air: Federal regulations require that travel be taken by the most direct and expeditious routing, which typically involves, when available, commercial air travel. If commercial air travel is available but the traveler wishes to travel by another means (e.g., vehicle, bus, train), any cost for this conveyance that is above the cost of commercial air travel is unallowable.
- Airfare change fees are rarely allowed on sponsored projects and require detailed justification for unlike/unusual circumstances. Change fees will be reviewed by SPA on a case-by-case basis for compliance with the Uniform Guidance. Additional airfare charges associated with changing a flight are also not allowable unless sufficient justification is presented and approved.

- Baggage fees charged by the airlines are allowable on sponsored projects. These are mandatory fees imposed on all travelers checking baggage. Reimbursable baggage fees must be reasonable and necessary in relation to the business purpose and trip duration. Fees for excess, overweight, or additional checked baggage will not be reimbursed without documented business justification.
- Flights should not be booked based on an individual's frequent flyer program affiliation. Flight options should be well researched, and the most economical option should be purchased and reimbursed from sponsored projects.
- Expedia, Travelocity, Kayak, etc. are great research tools to find the lowest cost airfare. It is recommended to use them to research the available options and then to book directly through the specific air carrier. Note – It is highly suggested that discount travel websites are not used to book international travel. Code share agreements are not always transparent and even when it appears to be a flight booked correctly on a US flag air carrier, that might not be the airline that actually is paid. See the Fly America FAQ for more information.
- Airfare upgrades are only allowed on sponsored projects when there is a medical need for an employee. If a medical need exists, written documentation, no older than 12 months, from a doctor, must be submitted with the travel expense statement. Other airfare upgrades are not allowable on sponsored funds. This includes, but is not limited to, upgrades in class, early-bird check in, priority access seating, and upgrades for preferred seats. US flag air carriers must be utilized for foreign travel on federal grants and contracts unless the flight qualifies as an exception under the Fly America Act. When using non-federal funds, US Flag Air carriers do not have to be used.
- If a foreign air carrier must be utilized for the trip, please refer to the Fly America Act, Open Skies Agreements or the sponsoring agency's guidelines to determine if/when this is allowable. Contact SPA prior to booking the airfare if there are any questions about this issue. Additional guidance on the Fly America Act and Open Skies can be found on the SPA website.
- Open Skies Agreements provide an exception to the Fly America Act. Please refer to the [Open Skies Guidance](#) document on the SPA website.
- Code share agreements are those in which one airline operates the flight, but another airline has an available seat to purchase on the flight. It is important to book the flight through the US airline and not through the foreign airline. The payment must be to the US airline.
- Exceptions – there are many exceptions that arise when booking travel. If you have a travel situation that might qualify for an exception, print screens should be obtained at the time of booking to document the available options.
- If a flight is booked and does not meet the criteria for charging to a sponsored project, the cost of the flight may be limited to a comparable flight found at the time of reimbursement or may not be allowable on the sponsored project at all depending on the situation. It is best to research, compare and document at the time of booking to avoid costly mistakes at the time of reimbursement.

