

Basic Sciences Travel Policy

This is a summary only and is intended to answer frequently asked questions.

Click [here](#) to view the Central Financial Services travel page for detailed information.

Please follow your department's pre-travel process *before* booking travel (this includes registering for conferences). Pre-review expedites travel planning by clarifying documentation requirements, payment options, and administrative support needs early in the process. Questions regarding funding availability, anticipated awards, or compliance with funding source should be directed to administrative staff and FAs.

Employees are responsible for notifying the department if their travel plans are cancelled (by the individual, by the conference organizer, by the airline, etc.). The department will review the specifics and determine how costs related to a cancelled trip should be handled.

Note: Documented approval from your department chair is required before booking travel charged to: Startups, Foundations, and Internal Grants. When travel expenses are for a lab member, graduate researcher, study coordinator, or other employee, documented PI approval is needed for traveler, event, and the alias being charged.

Travel review timeline

Domestic travel should be requested a minimum of 30 days prior to trip start date.

International travel should be requested a minimum of 3-6 months prior to trip start date (see 'International travel approvals and requirements' section).

Payment options

P-card use - Faculty or administrative p-card is preferred for the following expenses:

- Conference/meeting registration
- Airfare
- Car rental
- Hotel

Personal credit card use

- **Purchases (registration, flight, etc.) made on a personal credit card can only be reimbursed after the conclusion of the trip**
- Flights should be booked on a personal card if personal travel is involved AND the personal travel flight is more expensive than the comparison flight (see personal travel section).

Traveler responsibility for compliance

As a public institution, OHSU has many obligations to remain in compliance with travel policies.

- [Before Booking Travel](#)
- [What is allowable and not allowed?](#)
- [Traveler, Department, and Approver Responsibilities](#)

International travel

International travel is defined as anything outside of U.S. territories. Check [international travel resources](#) for additional information.

- Travelers are responsible for meeting all visa requirements in order to travel.
- OHSU Members traveling overseas must register their travel through [Risk Management's Off Campus Authorization System \(OCA\)](#) at least **90 days** prior to travel.
 - OCA registration allows the traveler to be covered by OHSU's insurance policy while travelling.
 - The combined approval form for Risk Management OCA and [Export Control](#) must be provided in iExpense.
- NIH-funded foreign travel may require pre-approval from NIH. Check with your grant coordinator to confirm.
- If flying into/through the UK (including layovers), an [Electronic Travel Authorization \(ETA\)](#) must be filed. That fee can be applied to the reimbursement or reconciliation (with documentation and receipts).
 - Preemptive ETA charges will not be reimbursed — it should be purchased only when a specific trip is booked.

Booking

- Airfare should be for economy/coach class (seat choice option is allowed, but no seat upgrades are allowed regardless of funding source)
- Airfare charged to federal grants must be on a U.S flag carrier (an airline owned by an American company). Flights using foreign airlines are not allowable on federal grants.
- If the hotel rate is exorbitant, but there are no less expensive options at or near the conference, a screenshot/comparison of hotel rates in the area should be provided, particularly if charging to a grant.
- Resort fees cannot be charged to a grant, even if the charge is unavoidable.
- If using Airbnb or similar service, comparisons showing costs of nearby hotels must be provided to show cost of Airbnb per person is less than or equal to local hotel rates
- Insurance and collision damage waivers offered through rental car agencies for domestic travel should not be accepted and are not reimbursable because they are redundant of insurance coverage provided by OHSU. Insurance in foreign countries is recommended and the cost is reimbursable.

Reimbursement timeline

- **Travel reimbursements (non-pcard charges) cannot be reimbursed until travel is completed.**
- Requests for travel reimbursement should be made within 15 days of the last day of travel. We cannot guarantee that requests made more than 15 days after travel has been completed will be processed within the non-taxable time frame.
- Travel reimbursement that is not fully approved by **60 days** after the end of travel will be considered taxable income.
- Requests for travel reimbursement expenses older than 6 months will not be processed.

Documentation requirements

- Each reconciliation documentation must include:
 - Conference/meeting information page showing conference name, dates and location (e.g.: full agenda, registration, invitation, etc.)
 - For flights: airline, to/from destinations, times, class, any/all fees associated with the itinerary
- All receipts (registration, airfare, etc.) must be itemized.
- All receipts must contain the payment information. **Reservation confirmations with no payment information are not sufficient for reimbursement.**
- Backup documentation must show the business purpose for the trip.
- The [Travel Information Form](#) is the CFS required cover page for all sponsored (grant/award) travel. It must be included with each iExpense submission for each traveler.

Combining Business and Personal Travel

If your trip involves more stops or a longer duration at your destination than is required solely for the business portion of the trip due to personal travel, please ensure you read the information below carefully.

Note: Travel may be considered personal if it occurs more than a day before or after the event. Check with administrative staff before booking you have questions.

Any expenses for travel outside of a business dates are considered personal. Personal travel requires comparison airfare and justification:

- Travelers will be reimbursed for actual airfare **OR** comparison airfare, whichever is less expensive.
- Comparison airfare must show what the cost of airfare for business dates only.
- **Airfare reimbursements/reconciliations without comparison airfare documentation will be rejected.**
- Comparison airfare should be from the same airline; the only difference should be the dates.
- Because airfares change so frequently, comparison documentation must be captured the same day airfare is booked.

Meal Reimbursements

- Meals provided by host entity are not eligible for reimbursement (e.g. if conference provides breakfast, traveler will not be reimbursed for breakfast.)
- Pay for your own meals only — do not pay for other travelers. Each traveller will be reimbursed separately and covering others only complicates the process.
- **Meals can be submitted as either itemized receipts OR per diems, but not both.**

OHSU recommends **per diems**. If using per diems, meals must be charged to a personal card, not a pcard.

- [Per diem](#) amounts are based on the travel location.

Actual meal expenses require itemized receipts — receipts showing only total or total and tip will not be reimbursed.

- If requesting reimbursement for actuals, keep meal costs to within per diem rates for the location.
- Meal receipts involving multiple attendees must include a list of all participants and a business purpose.
- Alcohol is not allowable on pcards and is not reimbursable: if alcohol is included on a receipt, document alcohol costs (including associated portion of tax and tip) and clearly indicate how much is being removed from the reimbursement. Actual meal expenses require **itemized** receipts (receipts showing only total or total and tip will not be reimbursed).

Sponsored Project (Grant) Funded Travel

Travel using sponsored funds must include justification that explains how the expense specifically relates to the scope of work being performed on the project being charged and is reviewed for allowability within funding guidelines. If a funding source imposes greater restrictions than OHSU's travel guidelines and/or OPAM's travel guidelines, the more restrictive guidelines apply.

Foreign travel may have additional restrictions depending on the sponsor. This may include ensuring compliance with the Fly America Act (see [Sponsored Project Travel Guidance](#)) and/or sending notification to the sponsor if foreign travel was not included in the original application budget.

Foundation Funded Travel Review

Travel reimbursement requests with Foundation funds are reviewed for the following:

- Travel expenses must comply with donor intent.
- Expenses must support the missions, programs, and activities of OHSU.
- Expenses must be reasonable expenses incurred while conducting business on behalf of OHSU or the Foundations.
- Expenses must not be for the personal benefit of an OHSU or Foundation employee, donor, board member, or any other related party.

Other resources: [OHSU Travel Policies](#), [CFS Travel Services](#), [Key Travel, Travel Discounts](#)