**Policy Overview**
An employee, during the normal course of business activity, may incur expenses that should be reimbursed. The employee may use personal funds ("out of pocket"), or a Harvard issued Corporate Card to pay for these expenses. When incurring a reimbursable expense on behalf of the University, an employee is responsible for requesting reimbursement, which is authorized by management, properly documented and submitted within 60 days through Concur, Harvard’s Expense Reimbursement System. For training and additional information regarding Concur visit Concur’s Website. This policy explains what types of expenses are reimbursable and the reimbursement process.

**Management Approval**
Before incurring any business expenses on behalf of the department an employee must receive proper authorization from his/her manager.

**Travel and Training**
In order to get reimbursed for travel and/or training expenses, the employee must have preapproval by completing the following steps:

- Fill out a [HUIT Conference Seminar and Travel request form](#)
- Email request form to supervisor and director for electronic approvals
Save and send the electronic copy of preapproval to Ahmed Ahmed (Do not include this form in Concur)

Please note that travel expenses for a trip that will exceed $10K per person requires Managing Director approval.

**Corporate Card vs. Out of Pocket**

**Corporate Card**
The Corporate Card can be used for both travel (preferred) and non-travel (not preferred) related business expenses. If you choose to use your Corporate Card, it is your responsibility to file an expense report through Concur within 60 days. The Corporate Card Company requires that all payments be received on or before the due date. You are responsible to pay any late fees.

To understand all of the guidelines and responsibilities see the HUIT Corporate Card Policy.

**Out of Pocket**
If you do not have a Corporate Card, travel and non-travel related expenses can be paid out of your own pocket to be reimbursed by the University. “Out of pocket” refers to any business expense paid by you personally, including both cash and personal credit cards. Note: Prepaid travel expenses (such as airline tickets) purchased with personal funds will not be reimbursed until after the trip or event has taken place.

**Travel and Training Planning**
Once an employee has received proper approval, they are responsible for booking their own travel arrangements based on policy guidelines.

Generally, travelers are expected to book the lowest-priced, non-stop airfare available. First class air travel is not allowed. Business class, where offered on a three-cabin flight, is acceptable in limited circumstances when the non-stop flight time exceeds six hours. Under extenuating circumstances, such as documented medical reasons, business class or first class service may be reimbursable where it is normally prohibited, provided the expense is approved by the traveler’s Financial Dean.

**University Resources**
When planning a trip, employees should utilize the University’s partnerships with preferred vendors and other travel agency resources which offer discounted rates for many travel type expenses including, air, hotel, and rental cars.

Please see the University’s Travel Website for further information.

**Best Practices**
Additional best practices to consider when planning a trip include:
- Booking flights weeks in advance, if possible
- Booking multiple travelers at the same time
- Using Boston ground transportation where ever possible

**What is Reimbursable**

**Reimbursable Expenses**
Business expenses will be paid by the University if they are reasonable, appropriately documented, and properly authorized. Individuals who incur business expenses should neither gain nor lose personal funds as a result of their travel. See “Non-reimbursable Expenses” for
those travel and business expenses that are specifically identified by University policy as ineligible for reimbursement.

The University will reimburse travelers for lodging expenses while on official University business further than 50 miles one way from the traveler’s place of work. An exception may be made, however, the business purpose must support and clearly state that the employee’s hotel stay was for the benefit of the University and not for the convenience of the employee.

Harvard’s preferred car rental partners are now Hertz and Enterprise/National. Travelers who use Avis, or any other car rental vendor (other than Hertz, Enterprise or National) after May 1, 2015, must also purchase a minimum of $250K in supplemental liability insurance – even if they use Harvard’s Avis corporate ID number or their Avis Preferred membership. The additional cost for this insurance is eligible for reimbursement.

Sales/Meals Tax
Harvard is exempt from Massachusetts Sales/Meals tax. The purchaser should ensure that tax is not included on business related purchases. Purchasers may be required to produce a Mass. Form ST-2 and ST-5 (Accounting can prepare the ST-5 as needed).

Meal Expenses
The following policies exist when determining whether or not meal expenses will be reimbursed:

- Meals will not be reimbursed for one day travel which is less than 12 hours.
- Travelers will be reimbursed for reasonable individual meal expenses while on University business. HUIT’s guideline for reasonable meal expenses while traveling are: $20 for breakfast, $30 for lunch and $50 for dinner. These maximum dollar amounts include tax and tip. You must submit detail receipts.
- Alcohol purchased at business meals should be kept to a minimum and must be charged to object code 8450. Itemized receipts for all business meals that include alcohol regardless of amounts are encouraged.

Non-reimbursable Expenses
University Policy specifies that the following items are considered non-reimbursable travel related expenses:

- Airline seating upgrades to first class
- Air phone calls
- Hotel recreational activities (e.g. spas, athletic facilities)
- Hotel room video rentals
- Laundry and valet service (if away less than 4 days)
- Additional expenses related to vacation or personal days taken before, during, or after a business trip
- Commuting (employee travel to/from work on a daily basis)
- All personal purchases
- Personal Accident Insurance (PAI)

For exceptions to the above list see the entire University Travel and Reimbursement Policy. Also see the HUIT Use of Department Funds Policy for a more complete list of allowable vs. unallowable expenses.

An employee will be responsible for all non-reimbursable expenses, including “out of pocket” and Corporate Card charges, incurred while traveling on Harvard business. In the event a Corporate Card is used for non-reimbursable expenses, the employee is responsible to pay the credit card company directly by mail or on-line access.
**Personal Expenses While Traveling**

The Harvard University Travel Policy states that personal/vacation travel may be combined with business travel provided there is no additional cost to Harvard and with appropriate departmental approval. Prior to traveling, an employee must have manager’s approval for any personal travel that may occur before, during, or after business travel. Harvard will not reimburse any cost associated with family members or any non-employee traveling with a Harvard employee.

If a trip was primarily for business, and the traveler extends his or her stay for a vacation, makes a personal side trip, or had other personal activities, the traveler can be reimbursed only for the business-related travel expenses. These expenses include the travel costs of getting to and from the business destination, lodging expenses incurred while conducting University business, and any business-related expenses at the business destination. Incremental costs that result from combining business and personal activities may not be reimbursed.

Before departing, an employee must define the following with his or her manager:

- The nature of the personal expense
- The time it will occur
- The estimated incremental cost to the trip
- How the cost will be accounted for upon returning

**Actual vs. Per Diem Rates**

HUIT does not allow an employee to be reimbursed by Harvard University based on per diem rates. Actual expenses must be submitted for all business travel and expense reimbursements.

**Travel Advances**

HUIT does not allow an employee to receive a cash travel advance from Harvard University. Corporate Card or “Out of Pocket” personal funds must be used for all business travel and expense.

**Use of Personal Vehicle**

**When Appropriate**

Although the University discourages the frequent use of a personal vehicle for business travel, employees may use their personal car for business purposes when it is less expensive than an alternate transportation or if it saves time. It is the responsibility of the employee to carry adequate insurance.

When traveling to an off-campus temporary business destination, a traveler may use a personal car and request mileage reimbursement if the traveler typically works at an on-campus location. In such cases, travelers must be reimbursed from their actual starting point, i.e., from their home if traveling directly to the temporary work location from home, or from their regular on-campus location to the temporary work location.

**Mileage Rate Reimbursement**

An employee will be reimbursed using the Federal government mileage rate per mile and within IRS guidelines. This reimbursement rate is issued each January and covers the employee’s use of their vehicle and gasoline. Concur will calculate the rate and must be used when requesting mileage rate reimbursement. In addition to the mileage rate reimbursement, an employee may be reimbursed for tolls and parking.

**Non-reimbursable Expenses**

An employee will not be reimbursed for the following expenses on their personal vehicle even if these costs are incurred during business travel:
Travel & Expense Reimbursement (cont.)

- Car repair or maintenance
- Rental car costs during repair of personal car
- Tickets, fines, or traffic violations

Receipts and Documentation

Receipts
It is the employee’s responsibility to retain and submit detail original receipts into Concur once the expense has been incurred.

Acceptable Documentation
Acceptable documentation includes:

- Payment Type - “Corporate Card” or “Out of Pocket”
- Original Detailed Receipt
- Business Purpose/Description
  - Why this is a Harvard expense
  - Who incurred the expense
  - What the expense entailed
  - Where the travel occurred
  - When the travel occurred (dated receipts acceptable)

Missing Receipt Affidavit/Missing Receipt Form
HUIT requires an original detailed receipt for all reimbursements. If, for some reason, an original receipt is unavailable, HUIT requires a Missing Receipt Affidavit (MRA) for purchases over $75.00. For purchases under $75.00 a Missing Receipt Form (MRF) is to be completed.

How to Be Reimbursed

Complete a Reimbursement Request in Concur
In order to be reimbursed for a business expense the employee must create and submit an expense report in Concur. Once complete the expense report is submitted to the employee’s manager for review and approval, once approved, it is then forwarded to Finance for review and approval. Travel Office has final review and approval authority.

It is the employee’s responsibility to submit all expense reimbursements within the 60-day window (allowing 10 calendar days for approval and processing time) in order to receive departmental reimbursement for business related expenses. Please see the 60-day policy for a full explanation.

How to Submit Credits
Occasionally a credit may be issued by a vendor to an employee after reimbursement by the University has been made. Below explains how to submit credits depending on the method used.

Out of Pocket
If the reimbursement was to the employee through an “Out of Pocket” UEF, the employee should write a check payable to “Harvard University” for the amount of the credit and send it to Ahmed Ahmed at 1230 Soldier’s Field Road.

Corporate Credit Card
If the reimbursement was made to the employee’s Corporate Card account, the employee must contact Ahmed Ahmed at 1230 Soldier’s Field Road. Ahmed will notify Travel Services of a pending credit and request reimbursement.

Egencia Credits
These credits should be used by the employee on the next business trip. Please note that Egencia credits cannot be applied to another traveler.
Quick Reference Guide
The Travel & Training and Reimbursement Quick Reference Guide provides information on getting approval for travel and training, how to submit an expense report and the available resources to assist employees in this process.