

TEMPORARY CHANGE REQUEST

TCR NO. **TCR-Travel Manual R0-001**

(e.g., TCR-ENG-021,R0-001)

The Temporary Change Request (TCR) Form is to be used to process urgent or minor changes for PPPL Policies, Organization/Mission Statements and Procedures. The TCR should be used when changes are:
1) urgent, and can not wait the 2-4 week period for Department Head review/comment, or
2) minor, and do not warrant Department Head review.

Person Requesting Change: Svetlana Drapkin Phone Ext: 3536
Department Name: Accounting
Document Number: PPPL Travel Manual Revision No.: 0
Document Title: PPPL Travel Manual

Reason for change:
Remove references and requirements for Trip report.

Change description: (Summarize and attach changed pages, with changes clearly indicated)

Remove references and requirements for Trip report.

1. Does this TCR significantly alter the intent or scope of the document? YES: NO: X
2. Does this TCR significantly impact **ES&H**? YES: NO: X

If 1 or 2 is **YES**, Explain why the changes should not be routed for Department Head review:

Department/Division Head Approval _____
Date

Head, Quality Assurance/Quality Control _____
Date

Release/Effective date of this TCR: 9/20/17

Incorporate this TCR into next revision of this document? YES: X NO:

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Princeton Plasma Physics Laboratory

PPPL Travel Manual

Revision 0

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Initiated by: Svetlana Drapkin
Head, Accounting

Approved: _____
Head, Business Operations Department and CFO

TCR-PPPL Travel Manual,R0-001

Princeton Plasma Physics Laboratory
Travel Manual

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I. Introduction

This document outlines requirements and guidelines for all individuals who travel on behalf of PPPL, regardless of the funding source. Trips funded by non-DOE organizations (e.g., Strategic Partnership Projects) may have additional requirements. The Travel Office will generally follow PPPL's guidelines unless there is specific information provided regarding additional requirements. It is the responsibility of the traveler and the Principle Investigator to understand and follow the travel requirements of non-DOE organizations.

All individuals who travel on behalf of PPPL are responsible for complying with and becoming familiar with the PPPL Travel Guidelines. All managers, supervisors and others who approve travel are expected to ensure the guidelines set forth in this document are followed. The PPPL Travel Office will provide assistance in complying with these guidelines; however, the traveler has ultimate responsibility for compliance.

Travelers and project management should support cost-effective measures by evaluating the need to travel and the potential of using less-expensive alternatives such as e-mail, and/or audio/net (Web)/video conferencing. Travel while on official Laboratory business must be conducted in a manner that meets business needs. The traveler must report travel expenses in a responsible and ethical manner. All official Laboratory travel must be properly authorized, conducted, reported and reimbursed in accordance with these guidelines.

This guidance does not cover Extended and Temporary Relocation Assignments. Guidance for these assignments can be found in the Human Resources Personal Practices Manual under the Employment Section.

II. General Guidelines

- A. All PPPL travel must be documented and approved prior to beginning the trip.
- B. Travelers cannot bill travel costs directly to PPPL.
- C. An official Laboratory business trip begins when the traveler leaves his or her residence or primary work location, whichever occurs last, and ends when the traveler returns to his or her residence or primary work location, whichever occurs first. The traveler is to account for the entire duration of the trip, including any personal time taken.
- D. Unless there is a compelling business reason (lower overall costs) to do so, the Laboratory will not reimburse expenses relative to weekend stays either at the beginning or the end of a Laboratory related business trip. These types of requests require a cost analysis to be performed with Head of Accounting approval.
- E. PPPL travelers must provide written justification, with Department Head approval, prior to any deviations from the travel guidelines. Requests for exceptions should be submitted to the Travel Office prior to incurring expenses. The Travel Office will evaluate each request for cost allowability, compliance and cost impact and then provide a response to the traveler with final determination of approval (Note: some requests may require senior management determination).
- F. Travelers are expected to maintain careful expense records and receipts for their travel. Only travel expenses that are ordinary and necessary to accomplish the official business purpose of the trip are eligible for reimbursement. Any increase in expenses for personal reasons is the responsibility of the traveler. Personal travel is not to be charged to, or temporarily funded by, the Laboratory.

- G. If personal or vacation days are used while on business travel, the dates must be specified on the Travel Approval Form and on the Travel Voucher.
- H. Travelers that make their own arrangements are at risk of not being reimbursed for the total cost of their trip if their travel costs exceed the lowest reasonable costs that could be obtained by the Travel Office.
- I. Employees may not authorize travel or approve travel expense reimbursement for themselves or for the person to whom they directly or indirectly report.
- J. Receipts for all expenditures greater than or equal to \$50 are required. The original merchant receipts are required to document and substantiate business expenses. A digital image of the original receipt is acceptable provided that it is legible. If a required receipt has been lost, a missing receipt affidavit form.(See the Travel Website) must be completed This form is an attestation that the expense is appropriate and allowable but the original receipt of \$50 or more is lost or unobtainable. Please ensure that a thorough business purpose has been entered to substantiate this expense.
- K. PPPL travelers are responsible for canceling their own travel reservations. Travelers who do not cancel their reservations in a timely manner will be responsible for any expenses incurred due to the cancellation. This requires travelers to understand the cancellation policies associated with their travel arrangements (airfare, hotel, rental car, and limousine). Travelers should familiarize themselves with of the cancelation timeframes for the vendors used for their travel arrangements

III. Pre-Trip Approval

A. Travel Approval Form

1. All official PPPL travel must be documented and approved prior to beginning the trip and before the traveler incurs any travel expenses. This is accomplished by submission of a Travel Approval Form (TAF) signed by an authorized signatory for each account that will be charged for the travel. A completed and signed Travel Approval Form is evidence that the trip is necessary and reasonable, has a valid business purpose and that the budget exists for the accounts entered on the form. Travelers are responsible for ensuring that they have approval from their supervisor to travel. Under no circumstances can a traveler approve his/her TAF, even if he/she has a signatory for the account being charged. Approval will be required by an individual that is the next level up in the signature authority table.
2. Requests for travel specific travel plans (e.g., air, hotels, car rentals) should be forwarded to the Travel Office either by email or in writing along with a completed and signed Travel Approval Form. Travel arrangements will be made by the Travel Office after receipt of the TAF and other required documentation (e.g., foreign travel, registration and conference attendance) as specified in these guidelines.
3. Significant modifications/additions not documented on the initial approved TAF, such as the addition of a car rental, destination and/or duration of the trip, will need to be approved by the account authorized signatory (email approval with justification, as appropriate, is acceptable). If the estimate on the TAF is lower than the actual by 25% or more, the Travel Office will inform the account signatory of the difference.
4. Submission of faxed/scanned copies of completed TAFs, accompanying documents and authorized signatures to the Travel Office is acceptable. Also, TAFs with email approvals or electronic signatures from authorized approvers attached will be accepted. Original document(s) is (are) not required to be submitted.

B. Unlimited Open Travel – restricted to individuals approved by the Director.

1. This process allows travelers approved for unlimited/open travel to plan travel without requiring a new TAF for each trip. A TAF, signed by the Director, is submitted to the Travel Office at the beginning of the fiscal year, or as needed, to cover all travel during a specific period of time. For each trip, the traveler does the following:
 - i. Sends an email to the Travel Office (*travel@pppl.gov*) with the following information:
 - Dates, times, destination(s) and purpose(s) of the trip;
 - Dates for any personal time that will be taken during the trip;
 - Account to be charged. If the trip is to be charged to multiple accounts, the distribution among the accounts must be provided. If the account number is not within the traveler's department, the email/form will be forwarded to the applicable Deputy Director for approval;
 - If no account is provided, the trip will be charged to the account listed on the Unlimited Open TAF;
 - Registration fee to be paid by PPPL, if applicable, with a completed registration form;
 - Amount of a cash advance, if needed

As an alternative to submitting an email, an unsigned TAF containing the necessary information may be submitted.

Travel arrangements cannot be processed without the information listed above. In addition, travel requests should be submitted in a timely manner according to travel and conference guidelines.

Travel Vouchers are required to be completed for each individual trip within 30 days.

C. Approval for Conference Attendance

1. All planned attendance to a conference must be coordinated with the Travel Office. Conference attendance requests must be submitted to the Travel Office as soon as possible (minimum 90 days in advance). The Travel Office is responsible for reviewing each TAF to determine if the trip is a conference or a non conference event. Requests for conference attendance are submitted to DOE by the Travel Office for approval. A definitive approval or denial for conference attendance will be provided by DOE, or a determination made by DOE that approval for conference attendance is not required. No commitments for conference travel may be made until notification is provided by DOE. Upon DOE notification, the Travel Office will email the traveler with DOE's response. Pre-approval to attend a conference is separate and in addition to obtaining approval and submitting a TAF. Refer to the Conference Attendance Procedure ACT-011 for specific guidelines.
2. Abstracts for presentations and/or papers to be presented at conferences must be reviewed and approved by the author's Department Head prior to submission. Any patentable material must be submitted to the Publishing Office at least 15 days before travel for Patent Clearance using the form found at: [Publication and Patent Clearance Approval Form](#).

Patent Clearance information can be found on the PPPL Technical Reports website

3. Conference Registration
 - i. If requested, registration fees will be paid directly to the sponsoring organization upon submission of a properly completed registration form along with a completed and signed TAF, with the fee amount listed on the form.
 - ii. If the traveler elects to pay his/her own registration fee, the Laboratory will reimburse the fees when receipts are submitted with the Travel Voucher. If a receipt cannot be

obtained, this should be noted on the Travel Voucher and other documentation submitted, such as a cancelled check, credit card bill or affidavit, if necessary.

Note: The DOE may only provide reimbursement at the early registration fee level. Any request for registration after the early registration fee deadline must be approved by the applicable Department Head prior to submitting the request to the Travel Office.

D. Approval for Foreign Travel

1. Official foreign travel is defined as approved travel (whether wholly or partly on official business) from the United States (including Alaska, Hawaii, the Commonwealths of Puerto Rico the Northern Mariana Islands and the territories and possessions of the United States) to a foreign country, including Mexico and Canada, and return or travel between foreign countries by persons, including foreign nationals, whose salaries or travel expenses or both will ultimately be funded in whole or in part by DOE/NNSA from its appropriations. Official foreign travel also includes travel funded by non-DOE or non-NNSA sources for which the traveler represents the DOE or NNSA or conducts business on behalf of the U.S. Government. Submission for foreign travel authorization must be made by the traveler at least 30 calendar days (non-sensitive country) or 40 days (sensitive country) before the departure date. This requires the traveler to submit DOE form F551.1C. Request for Approval of Foreign Travel (RAFT) Official foreign travel may not occur without prior DOE approval. If a travel request is not submitted to the Travel Office in time to meet the 30-day (non-sensitive) or 40-day (sensitive) requirement justification for the late submission must be provided on line 26 of the foreign travel approval form or by email with the approval of the Travel Office along with the other required documentation.
2. In addition to a RAFT, foreign travel requires the same travel approval process as domestic travel. Prior to receiving any advances or obtaining tickets, the approved RAFT must be entered into the Foreign Travel Management System (FTMS) and submitted with any other necessary documentation, such as a Letter of Invitation, if needed, to the Travel Office. As specified under DOE Order 551.1C, Form 551.1C must be filed whether or not DOE funds are being used to finance the trip. Instructions to complete RAFT are provided in ACT-003 (See Foreign Travel Procedure).
3. The DOE and the Department of State require that country clearance be obtained for official travel to a foreign country prior to the commencement of the foreign travel. It is the responsibility of the Travel Office to obtain DOE, Dept. of State and country clearance/approval on behalf of the traveler. An email will be sent to the traveler once the trip has been approved. If there are any revisions or changes to the travel plans after DOE has approved the trip (e.g., additional days and/or countries), the Travel Office will provide guidance for re-approval requirements. Travelers should be aware of the U.S. Government's "sensitive countries" list, as it may take longer to obtain DOE approval for travel to any of these countries. Contact the Travel Office to determine if a country is classified as sensitive.
4. If a travel request is not submitted to the Travel Office in time to meet the 30-day (non-sensitive) or 40-day (sensitive) requirement justification for the late submission must be provided on line 26 of the foreign travel approval form or by email with the approval of the Travel Office along with the other required documentation. The DOE may not approve these exceptions.
5. The DOE Counterintelligence Office will provide pre-travel briefs and post travel de-briefs for foreign country travel and sensitive country travel where possible. Travelers may request a briefing with Counterintelligence by contacting the Travel Office.
6. Foreign travel may not occur without official notification from PPPL's Occupational Medicine Office (OMO). The OMO receives notification, from line 28 of the FTMS form that a traveler will be traveling to foreign destinations, with dates of travel, and other relevant information. The

OMO reviews the appropriate State Department websites to determine if there are any “hot issues” before the start of travel. The traveler is then notified of the safety and health issues of the country to be visited and is provided with the appropriate guidance as determined by the OMO physician.

7. Personal leave in conjunction with PPPL foreign business travel, including Strategic Partnership Projects (SPP) foreign travel, may not exceed two business days to one personal day ratio (2:1) inclusive of weekend or holiday. Travel days to and from a business location will be considered business days.
8. For international trips, if the ratio of business to personal days does not exceed 2:1, then the traveler is responsible for all paid costs over and above the business portion of the trip. **If the ratio of business to personal days exceeds the 2:1 ratio, then NO travel will be authorized or expenses, business or personal, will be reimbursed.**

E. Group Travel

1. Travel for any purpose of more than a single person is considered to be Group Travel. Approval from the Laboratory Director is needed whenever three or more Laboratory Council Members or key project personnel will be traveling together. The Laboratory restricts groups from individual departments from traveling in the same plane, train, or automobile, principally to avoid the situation where accidental injury to the group would seriously impair the operation of the department. It is the responsibility of the Department Head to enforce this restriction. Group travel of 3 or more travelers must be booked directly with the Travel Office.

F. Travel by Non-PPPL Employees

Non-employees traveling at the Laboratory's request may be reimbursed for their travel expenses. In addition to complying with these Travel Guidelines, the following special guidelines apply:

1. Visitors - Requires a Travel Approval Form signed by an account signatory.
2. Interviewees
 - a. Travel expenses incurred for employment interviews are authorized when necessary to recruit key personnel for work positions at PPPL. Any travel expenditure for interviewees must have an approved Travel Approval Form, completed by the individual with signature authority, documenting the authorized travel expenses with a notification email sent to Human Resources.
3. Retirees planning on travel for PPPL must follow all of the approval requirements for each type of travel defined for employees of PPPL. The TAF must have the purpose of the travel and the benefits that PPPL will receive from the proposed travel that are specific enough to meet the “allocability” criteria for cost allowability. The Head of Accounting must review and approve the Travel Approval Form.

G. **Subcontractors** (not under PPPL direct supervision) – Subcontractors must follow the travel guidelines in their contract agreement with PPPL. Subcontractors being reimbursed for PPPL business that is not through their contractual agreement must follow these guidelines.

H. Travel Advances

1. Travel advances are generally not provided except for limited circumstances described below. A justification must be provided along with Head of Accounting approval. The amount of the advance will be determined based on the traveler’s need or under the following circumstances:
 - i. Employee travels infrequently and does not qualify for a Princeton University Travel Card.
 - ii. Employee was denied a Princeton University Travel Card.

- iii. Visitors who are entitled to advance payment of M&IE during their visit.
- iv. Lengths of assignment or circumstances that require advance payment of some expenses (e.g., a security deposit for an apartment rental).
- v. For out of pocket expenses only.

I. Direct Billing Process

1. Any time travel expenses are direct billed (examples such as airfare and hotel) it is the traveler's responsibility to request all receipts for services used and submit them to the Travel Office. Travelers must verify, prior to using services (i.e., during check-in) that a direct billing account has been set up and the Laboratory's credit card is being charged. This will ensure all billing is handled appropriately with the least amount of administrative follow up. Review the bill prior to check out to ensure all billing charges and details are accurate. Direct billing is done only under limited circumstances with documented justification and the approval of the Travel Office. The exception to this is when direct billing is done for a large group of people (such as hotels/shuttles for APS), and large groups, as determined by the Travel Office, if there is a cost savings.

IV. Travel Arrangements and Pre-Trip Planning

A. Transportation

1. Air Travel

Travelers should book airline reservations through the Travel Office or Laboratory's Travel Agency to obtain the lowest allowable coach airfare and ensure compliance with all federal requirements (e.g., Fly America Act). Tickets purchased through the PPPL Travel Office are the property of PPPL. Reservations should be made as early as possible to take advantage of the lowest coach fare available. All such tickets, including those that are unused (full or partial), must be reported on your Travel Voucher. If the ticket is cancelled for any reason, the ticket remains the property of PPPL.

i. Obtaining Lowest Available Airfare (Coach Class)

- a. Travelers are expected to travel by the most efficient and economical modes of transportation possible (lowest available airfare on coach class) within mission requirements, on the most direct route consistent with the business purpose of the trip (i.e., utilize negotiated or discounted airfares; request departure and arrival within a two-hour window; or consider alternate airports).
- b. Coach class, or any discounted class, must be used in the interest of economy on all domestic or foreign flights. Except under extenuating circumstances, written authorization for reimbursement of airfare for business-class or first-class service must be obtained in advance and approved by the Travel Office. The following are examples of when a traveler may use the lowest other than coach-class airline accommodations:
 - When exceptional security circumstances require other than coach-class airline accommodations.
 - When use of other than coach-class is necessary to accommodate a medical disability or other special need
- c. When use of other than coach-class is necessary to accommodate a medical disability advance approval must be obtained by the OMO. The OMO will evaluate the

traveler's medical condition and notify the Travel Office with an approval/disapproval of the request from the traveler to purchase airfare tickets for premium seating. In addition, the OMO will define the time period of the approval.

- d. Any traveler whose airfare exceeds the lowest available fare obtainable by the Travel Office may not be reimbursed for the additional cost without written justification for the additional expenses. This justification must be approved by the traveler's Department Head and be submitted to the Travel Office before the trip commences.
 - e. Reimbursement is limited to the actual expense for business travel only. Any airfare for personal reasons will not be reimbursed unless the cost is less than or equal to the lowest available coach fare for the business travel.
- ii. **Advance Purchase.** Travelers who purchase their airfare for a pre-approved trip in advance of traveling, can be reimbursed prior to their traveling to the location; however, travelers that purchase their own ticket are at risk of not being reimbursed for the total cost of ticket if the cost exceeds the lowest cost, under reasonable circumstances, that could be obtained by the Travel Office. Once a traveler is reimbursed for the purchased tickets they are the property of PPPL. It is recommended that the traveler consult with the Travel Office prior to purchasing a ticket.
- iii. **Airline Ticket Credits**
- a. Airline ticket credits resulting from trip cancellations are stored in the Travel Office database for future use by the traveler. Ticket credits expire after a period of time (usually one year from date of issue), his rule varies by airline. There are changes and fare rate differences associated with trip cancellations and reuse of these tickets.
 - 1) An unused airline ticket must be reported and submitted on the Travel Voucher for which it was intended, even if the trip was cancelled. An airline ticket must be cancelled prior to the flight for the ticket to have future use.
 - 2) When the airline credit is subsequently used on another trip and if the subsequent trip has a cost center other than the one used for the original Travel Voucher, the account indicated on the Travel Approval Form will be charged for the adjustment.
- iv. **Use of U.S. Carriers.** All commercial air travel between the United States and a foreign country and between foreign countries must be made via a U.S. flag carrier or U.S. code share as required by Public Law D93-629, Fly America Act. This applies to the following:
- Travel reimbursed from any funding source (DOE or non-DOE);
 - International charter flights;
 - Travel to/from Canada or Mexico;
 - Flights from a personal destination in a foreign location to another foreign location, required for business, does not require the use of a U.S. flag carrier.
- v. **Use of Foreign Carriers.** In accordance with the Fly America Act, foreign carriers can be used only under the following circumstances:
- a. If a U.S. flag air carrier offers nonstop or direct service (no aircraft change), from the traveler's origin to destination, the traveler must use the U.S. flag air carrier service unless such use extends travel time, including delay at origin, by 24 hours or more.
 - b. If a U.S. flag air carrier does not offer nonstop or direct service between the traveler's origin and destination, the traveler must use a U.S. flag air carrier on every portion of

the route where service is provided unless (when compared with using a foreign air carrier) such use would apply to one or more of the following:

- 1) It would increase the number of aircraft changes the traveler must make outside of the United States by two or more.
 - 2) It would extend the travel time by six hours or more.
 - 3) It would require a connecting time of four hours or more at an overseas interchange point.
- vi. **The Code Share Agreement** provides for compliance with the Fly America Act if the U.S. air carrier is the ticketing agent and issues a flight on a non-U.S. air carrier. The payment for the airfare must be made to the U.S. air carrier. If a non-U.S. air carrier is the ticketing agent, the flight is considered a non-U.S. air carrier flight and is in violation of the Fly America Act.
- vii. **Open Skies Agreements** provides that qualifying travelers, whose travel is supported by federal funds, may travel on airlines from the European Union, Australia, Switzerland and Japan as well as U.S. Flag Air Carriers. Travel being reimbursed using Department of State (including all of the Department of Defense) funding is not eligible for the Open Skies Agreements exception.
- viii. **Involuntary Denied Boarding Compensation.** Compensation made to travelers by airlines for involuntary denied boarding is the property of the Laboratory and must be returned with the Travel Voucher to be credited to the cost of the trip.
- ix. **Voluntary Denied Boarding Compensation.** Travelers may voluntarily vacate reserved airline seats and retain the payment received from the airline under the following conditions:
- a. Any resulting additional expenses are borne by the traveler.
 - b. Relinquishing a reserved seat does not diminish performance of official duties.
 - c. Vacation is charged to the extent that travel is delayed during normal work hours.
- x. **Reticketing/Schedule Changes.** Charges for reticketing, schedule changes, etc., may be reimbursed for a valid business reason. The reason for the charge must be provided on the Travel Voucher.
- xi. PPPL Travelers may keep all rewards related to travel (e.g., Sky Miles, Marriot Rewards, etc.). Enrollment fees for these programs are a personal expense and are not reimbursable. Reward numbers may be provided to the Travel Office to be used when making travel arrangements.
- xii. **Travel Membership Clubs.** The Laboratory does not reimburse for airline membership clubs.
- xiii. If the traveler takes an indirect route or interrupts a direct route for personal travel reasons when on business travel, the airfare will be reimbursed based on the lesser of the actual amount, or the cost that would have been incurred by traveling the direct route.

2. **Transportation To/From Airport (Ground Transportation)**

PPPL's reimbursement policy for transportation to and from airports limits the use of point-to-point car service. Car service should be used when they are less expensive than alternative means of transportation (e.g., train, shuttle services, taxi, or personal auto) or when there are inconveniences or safety issues that justify the additional cost. When traveling with others, it is often more economical to coordinate travel times and share a limousine or shuttle service. The

modes of transportation for each of the airports and the amounts that will be reimbursed can be found on the travel website

3. **Vehicle Rental**

Travelers may be reimbursed for vehicle rentals when needed; however, the cost must be included on the Travel Approval Form and reasonable when compared to other available means of transportation and travelers are expected to use the Laboratory's preferred rental car vendors.

i. **Reimbursements**

- a. A traveler will be reimbursed only up to the cost of a midsize/intermediate vehicle. Full-size vehicles, station wagons, minivans, or sport utility vehicles will not be authorized, or the incremental costs will not be reimbursed, unless the vehicle is shared by no fewer than three other PPPL travelers or the traveler is transporting PPPL equipment that justifies the need for additional carrying space or for safety reasons in adverse weather. Free upgrades may be accepted by the traveler.
- b. For travelers attending a conference, the cost of vehicle rentals are not reimbursable if the traveler is staying at the conference hotel, staying at another hotel when the conference hotel is available, or staying within a reasonable walking distance from the conference hotel. Any extenuating circumstances that would justify the need for a rental car while at a conference hotel should be approved by the Travel Office prior to making arrangements.
- c. If a vehicle rented for business purposes is also used for personal reasons, the rental costs will be prorated accordingly. All additional costs, such as gas, tolls, and parking, incurred as a result of personal use must be paid by the traveler. A PPPL employee or student who plans to use a rental car for personal reasons (sightseeing, etc.) while on a business trip should consider procuring insurance coverage, at his/her personal expense, to eliminate any personal financial liability should an accident occur while the rental vehicle is being used for personal reasons.
- d. Employees are expected to refuel the rental car prior to returning it. Any portion of the gasoline used for personal errands or sightseeing is the traveler's responsibility and is not to be claimed on the Travel Voucher.
- e. EZ Pass toll transponders and satellite radios are an unallowable expense for vehicle rentals. Travelers are advised to ensure the rental car does not have an EZ Pass transponder or satellite radio activated for their rental.
- f. Global Positioning System (GPS) units provided by rental companies are an unallowable expense, except when approved by the Travel Office, and will not be reimbursed by PPPL. The Travel Office has purchased GPS devices which are available for use on business travel in domestic and international locations. The Travel Office is responsible for issuing these devices and tracking their usage.

ii. **Insurance Coverage**

- a. Princeton University has negotiated discounted rental rates with selected rental agencies. This includes insurance coverage for automobile liability insurance and physical damage coverage. However, the additional insurance coverage only applies to PU/PPPL employees and PU students. While on domestic University business, the Collision Damage Waiver (CDW) and personal liability insurance offered through the rental company should be declined, provided that the reservations are made through the Travel Office. Renters should also verify that the insurance is included in the rental agreement at no additional charge. When

renting a car from a rental agency other than the PU selected rental agencies, all insurance coverage offered by the rental agency should be declined. The Princeton University website for insurance guidelines can be found at: [Princeton University Risk Management Auto Insurance Guidelines](#)

- b. All individuals who rent a vehicle while on Laboratory business outside of the Continental U.S. should purchase the following coverages: collision, comprehensive, liability and loss damage waiver. Such insurance is necessary due to rental or leasing agency requirements, foreign statute, or foreign legal procedures that could cause extreme difficulty if a traveler is involved in an accident. Vehicle rental reservations made by the Travel Office will include these coverages. Students are prohibited from renting vehicles in international locations.
- c. Individuals traveling on behalf of PPPL who are not PU/PPPL employees or PU students (e.g., visitors, consultants, etc.) are not covered by the University's auto insurance policy and should purchase the liability and collision/comprehensive damage insurance coverage from the rental car company. These costs will be reimbursed by the Laboratory.
- d. Passengers (non-PU/PPPL employees or students) in a vehicle rented by a PU/PPPL employee or student should not be allowed to drive the vehicle under any circumstances.

Due to the complexity of the various insurance issues affecting these transactions, all vehicle rental transactions should be processed through the Travel Office. If circumstances do not permit this, the Travel Office should be consulted for any questions regarding these insurance/liability related issues.

4. **Government Vehicle**

Government vehicles should be used whenever possible. All drivers must show a valid, current driver's license and take a one-time training for the make/model vehicle they will be using. A PPPL owned EZ Pass transponder may be available for use in areas where the EZ Pass is accepted. A PPPL credit card can be used for purchasing gas for the vehicle. In the event that the transponder or gas credit card is not accepted, reimbursement for itemized toll and other costs may be claimed. Please consult Transportation Services (x2716, x2328 or *vehicle-dispatch@pppl.gov*), regarding the availability and use of government owned vehicles, EZ Pass transponder and gas credit card. When a government vehicle is used it should be noted in the comments section of the Travel Voucher.

5. **Personal Vehicle**

The use of a personal vehicle for business purposes is allowed when it is less expensive than alternative means of transportation or when there is convenience or safety issues that justify the additional cost.

- i. Travelers will be reimbursed at the current rate per mile stipulated by the General Services Administration (GSA) for miles incurred (i.e., odometer readings) in excess of your normal commute. The personal mileage reimbursement covers all costs related to the operation of the vehicle, including service, maintenance, insurance, depreciation and gas. The current rate can be found on the PPPL [Travel Website](#).
- ii. Reimbursement for use of a vehicle will not be for more than traveled as determined by standard highway mileage guides without adequate explanation Equivalent Airfare - A traveler may choose to use a personal vehicle for personal reasons even if air travel is the appropriate mode of transportation. For this situation, reimbursement for use of the

personal vehicle may not exceed the airfare PPPL would have paid if air travel, along with the normal cost of ground transportation to and from airports to the business destination, had been used. The cost of meals, lodging, tolls, ferries, and parking while in transit may be reimbursed if the total amount reimbursed does not exceed the equivalent airfare. Equivalent airfare is determined as:

- a. The constructive equivalent cost (coach class fare, ground transportation and meals).
- iii. Individuals attending seminars/meetings in the Princeton area during a regularly scheduled workday are not eligible to be reimbursed for mileage from their home to the meeting location.
- iv. Insurance Coverage
 - a. When a personal vehicle is used for PPPL/University business, the personal vehicle insurance is always the primary coverage and will provide coverage for damages incurred if there is an accident involving the vehicle. When using a personal vehicle for PPPL/University business, compliance with all state regulations — including maintaining the minimal amount of insurance coverage is required.
 - b. If a personal vehicle is damaged while being used for PPPL/University business, the University will reimburse the deductible up to a maximum of \$1,000 for physical damage to the personal vehicle only. The University's automobile liability policy may cover third party liability damages in excess of the coverage available under the personal vehicle policy. In the event of an accident, Princeton University's insurance can only cover expenses in excess of the limits of the personal vehicle coverage. If the personal vehicle is not insured for comprehensive fire, theft, or collision, no such reimbursement will be made. If an accident should occur while using a personal vehicle on official University business, the accident should be reported to the insurer of the vehicle, the Travel Office and the Office of Risk Management of the University. Further information can be obtained by calling the Office of Risk Management at 258-3349 or 258-3078.
- v. Traffic tickets or fines associated with travel or parking violations and charges for vehicle lockouts, are an unallowable expense.
- vi. The University provides a comprehensive free shuttle service for intercampus travel, including Forrestal and PPPL. Reimbursement for use of a personal automobile for intercampus travel is not an allowable expense unless there is a documented medical need.

6. Train or Bus

When rail or bus transportation is used instead of available air travel, actual lodging expenses and M&IE will be reimbursed. Reimbursement for the cost of a sleeping car accommodation is allowed in lieu of lodging expense for each night that these accommodations are used. When traveling by train, coach class accommodations should be used to the maximum extent possible on the basis of cost to the Government, suitability and convenience to the traveler, and the nature of the assignment. The lowest first class sleeping accommodation available will be allowed when night travel is involved. A trip is considered "night travel" when the scheduled departure is 6PM or later. Transportation by bus is not limited to any specific class of service.

i. Domestic Train Travel

Business-class: (offered on Amtrak Acela or Metroliner)

- a. Business class service offered on Amtrak Acela is an additional fare train service which is acceptable for travel to/from Boston, MA or Washington, DC.
- b. Business class service may be used whenever the Travel Office determines it is more advantageous to the Government or is required for security reasons. The use of the lowest class of service available on any AMTRAK Acela or Metroliner train service (including Acela Express) is deemed advantageous to the Government and no further approval is needed. AMTRAK Acela and Metroliner first-class accommodations may be authorized/approved only as defined in the GSA policy and must be approved prior to making arrangements for travel.

If rail or bus travel is to be used instead of air travel for personal convenience, reimbursement of expenses including the fare, M&IE, lodging, tolls, ferries and parking shall not exceed the sum of the total allowable airfare (if air travel had been used), and the normal cost of ground transportation to and from airport terminals. Travelers should contact the Travel Office prior to traveling to determine the allowable airfare and reimbursable limits.

ii. **Foreign Train Travel**

For international rail travel, travelers may purchase a fare that offers reserved seating. The cost of reserved seating, seat selection and overnight accommodations is an allowable expense.

B. Hotels and Lodging

1. Travelers are reimbursed for actual lodging expenses while on Laboratory business. Generally, reimbursement should be within the federal per diem rates for lodging (available at: <http://www.gsa.gov/portal/content/104877>; per diem rates exclude taxes); however, actual lodging expenses in excess of the per diem rates may be reimbursed. Actual lodging expenses which exceed the per diem rate by less than 25% do not require justification. The Travel Office approves the rate over the per diem up to 25%; those lodging expenses that do exceed the per diem rate by 25% require justification. This justification must be included on the TAF and will be reviewed and approved by the Travel Office for reasonableness. Prior to making reservations, those lodging expenses that will exceed the per diem rate by 150% or more requires approval of Head of Accounting. Examples where lodging will be approved in excess of the per diem are:
 - i. Lodging (and/or meals) at a pre-arranged place such as a hotel where a conference, meeting, or training session is held.
 - ii. Lodging costs are temporarily escalated due to special events (e.g., sporting events, conventions, natural or man-made disasters).
 - iii. Lodging (and/or meal) expenses within the prescribed allowances cannot be obtained nearby; and costs to commute to/from the nearby location consume most or all of the savings achieved from occupying less expensive lodging.
 - iv. Business must be conducted in a certain location on certain days and no lodging is available at the government rate.
 - v. Other unplanned circumstances such as:
 - a. Government rate room booked is not available upon arrival at hotel.
 - b. Flight cancellation requires stay at an airport hotel and the cost is not compensated by the airline.

The cost of any lodging accommodations in excess of 300% of the federal lodging per diem rate cannot be charged to the DOE under any circumstances.

2. The Travel Office will make every attempt to locate lodging within the FTR lodging allowances.
3. Lodging accommodations - The traveler may arrange his/her own lodging; however, the cost is not permitted to exceed the published federal lodging per diem rate or any hotel cost cap placed for attending a conference without prior approval of the Travel Office.
4. If lodging is not available at the traveler's business location, the Travel Office will use the maximum per diem rate for the location where lodging is obtained.
5. The class of hotel must be reasonable and appropriate for the business purpose and location. PPPL travelers should stay in standard rooms only. Suites and other upgraded rooms are not allowable expenses. If there is a valid business need for a non-standard room, the business purpose must be documented on the Travel Voucher and approved by the PPPL Travel Manager. If a traveler chooses to stay at the home of a family member or friend, he/she will only be reimbursed for M&IE and not for lodging costs. Hostess gifts are an unallowable expense and therefore, are not reimbursable.
6. Travelers may receive an M&IE allowance while staying with family or friends, but must deduct any meals provided by the host during the stay.
7. The PPPL Travel Office will guarantee all hotel reservations for late arrival. It is the responsibility of the traveler to notify the hotel and Travel Office as quickly as possible of any cancellations. It is the traveler's responsibility to check the hotel's cancellation policy. Travelers must cancel reservations to avoid no-show charges directly with the hotel. Any penalties that are a result of the negligence on the part of the traveler may be considered an unallowable DOE contract expense and may be charged directly to the traveler. When notifying a hotel of a cancellation, a cancellation number should be obtained along with the name of the person who cancelled the reservation.
8. Lodging for conferences and meetings may have a cap placed on them by PPPL to reduce costs. A traveler making his/her own reservations for which the hotel rate is in excess of the cap will be responsible for the cost difference.
9. For non-conventional lodging such as Bed and Breakfasts, University Housing, Hostels, etc., the reimbursement rules are the same as for conventional lodging.
10. It is the traveler's responsibility to pay for the lodging bill when checking out. If direct billing has been set up for lodging, it is still the traveler's responsibility to obtain a detailed receipt.
11. If reimbursement is requested for hotels within 50 miles of a traveler's home, Justification must be submitted and approval obtained from the traveler's Department Head and the Head of the Accounting Division prior to the travel.

12. **Rate Guidelines by Location (NON-CONTRACT FUNDS ONLY)**

The following are guidelines for maximum nightly rates by location (before taxes). If the nightly rate exceeds the amount below, the business purpose must be clearly documented on the Travel Voucher. This list will be reviewed and updated periodically.

United States:

- \$350 New York City, San Francisco
- \$300 Washington D.C., Boston
- \$250 All other U.S. locations, except Princeton
- \$190 Princeton, except during Reunion/Commencement week

International:

- \$350 Delhi, Johannesburg, London, Mumbai, Nairobi, Paris, Rome
- \$300 All other international locations

C. Meals and Incidental Expenses (M&IE)

M&IE reimbursement is limited to per diem. M&IE will be reimbursed based on the type of travel and location in which the traveler is staying.

1. Per diem rates - The traveler is responsible for checking the federal per diem rates before departure, noting that domestic per diem rates are updated annually and foreign per diem rates are updated monthly. When a trip includes more than one PPPL business destination and the cities involved have different per diem rates, the per diem rate for each calendar day (beginning at 12:01 AM) is determined by the location where the lodgings are obtained for that night.
2. If a traveler is away from his/her authorized point of departure for 12 hours or more, the traveler may receive an M&IE reimbursement in accordance with established policy.
3. For a trip with duration of 12 hours or less, no reimbursement for M&IE will be given. The traveler will only be reimbursed for total mileage less daily commute miles. Parking, public transportation, taxis and other expenses directly related to local travel claims will be reimbursed.
4. Meals and Incidental Expenses (M&IE) - Per diem amounts for the first and last day of the trip are reimbursed at 75% of the M&IE rate applicable using the rate of the business destination city. The location where lodgings are obtained for the first and last night determine the rate for the departure and return days, respectively.

The following table reflects M&IE allowance guidelines:

Travel Time (Hours)	M&IE Allowance	
12 or less	None	
More than 12, but less than 24	75% of applicable rate	
24 or more	Day of departure	75% of applicable rate
	Full day of travel	100% of applicable rate
	Last day of travel	75% of applicable rate

5. Employees must exclude the cost of meals provided by others from the per diem rate; such meals include those that are part of a registration or hotel rate, meals provided by the business site, meals paid by others, or meals paid directly by PPPL.
6. Non-Business Standby Days - Weekends, holidays, and other necessary standby days may be counted as business days only if they fall between business travel days. If the non-business day is at the beginning or end of a traveler's business activity and the traveler arrives early or remains at the business destination for non-business reasons more than 24 hours before or after the business activity, reimbursement is not allowed for the additional days. Exceptions require Department Head approval.
7. Domestic M&IE rates: [CONUS Rates](#)
8. Foreign M&IE rates: [OCONUS Rates](#)

9. While on domestic or foreign travel incidental expenses may include fees and tips given to porters, baggage carriers, bellhops, and hotel maids. Laundry and dry cleaning is considered an incidental expense for foreign travel only.

D. Miscellaneous Business Expenses

1. Phone Expenses

- i. Calls Home- Travelers may be reimbursed for expenses for long distance personal telephone calls as follows (reimbursement maximums include line access charges and taxes):
 - a. A traveler on travel status for at least one night within the continental United States is allowed a maximum reimbursement for calls not to exceed \$4.00 per day or \$12.00 per week.
 - b. A traveler on travel status for at least one night outside the continental United States is allowed a maximum reimbursement for calls not to exceed \$8.00 per day or \$24.00 per week.
 - c. PPPL has cell phones, wireless devices and calling cards that may be available for individuals on travel. Email your request to (*telecom@pppl.gov*).
 - d. The use of Google Talk software is also an acceptable cost effective option. The use of Skype is not allowed without proper justification of business use.
 - e. For long term travel, please contact the telecommunications department for possible options.

ii. Emergency Phone Calls

Personal calls made due to urgent or emergency situations may be reimbursed provided there is an adequate explanation on the Travel Voucher. This includes the use of air and train telephone service.

2. Internet Connection

PPPL travelers are encouraged to plan ahead and secure a broad band data card from the PPPL Telecommunications Group. Internet access (e.g., hotel, airport, hotspot, etc.) is an allowable expense provided that the access is necessary for business purposes and not personal use.

3. ATM Fees

Reimbursement of ATM fees for any credit/bank card will be permitted for trips with a duration of 3 days or more. Withdrawals will be permitted at a rate of no more than one withdrawal every 7 days. At times, circumstances may require more frequent withdrawals. Any request exceeding those outlined here will require written justification and account signature approvals for more frequent withdrawals.

E. Vacation During Business Travel/Travel Companions

1. The travelers are allowed to combine personal time with business travel as long as approval is obtained from their PPPL supervisor before leaving for business travel. The traveler is responsible for all costs in excess of the expenses incurred for the PPPL business travel.
2. Use of vacation time while on business travel must be clearly indicated on the Travel Approval Form and Travel Voucher. The traveler is responsible for having vacation days approved before purchase of airline tickets and trip approval.
3. For international trips, if the ratio of business to personal days does not exceed 2:1, then the traveler is responsible for all paid costs over and above the business portion of the trip. **If the**

ratio of business to personal days exceeds the 2:1 ratio, then NO travel will be authorized or expenses, business or personal, will be reimbursed.

4. If a traveler is on vacation or has paid vacation arrangements and is required to interrupt his/her vacation for business reasons, travel costs will be reimbursed from the vacation point to the official business point and back to the vacation point, plus any change or penalty fees that may apply. All expenses incurred by a traveler as a result of his/her vacation being interrupted will be considered for reimbursement with Department Head approval.
5. When personal travel days occur after the business event, reimbursement for lodging and M&IE reimbursement will end on the last business day. The traveler may request up to 75% reimbursement of M&IE for the last day of business travel. Airport parking fees, rental car charges and other applicable expenses should be prorated based on the ratio of business to personal days.
6. The travel expenses of a spouse, family member, or other person who accompanies the approved business traveler will not be reimbursed by PPPL.
7. When a business traveler and his/her travel companion(s) occupy a double occupancy hotel room, PPPL will reimburse the traveler at the single occupancy hotel room rate. The traveler is responsible for obtaining the single occupancy room rate and providing the rate even when the single rate and double rate are both within the per diem rate. The single vs. double occupancy room rate must be documented on the Travel Voucher.

F. Travel Cancellation and Emergency Travel While on Business

1. If a business trip or the business portion of a combined personal/business trip is rescheduled or cancelled for PPPL business reasons, the associated business costs of the travel, including cancellation fees, are reimbursable to the traveler by submitting a Travel Voucher.
2. Emergency Travel is travel which results from:
 - i. The traveler becoming incapacitated by illness or **injury not due to his/her own misconduct; or**
 - ii. **The death or** serious illness of a member of the traveler's family; or
 - iii. A catastrophic occurrence or impending disaster, such as fire, flood, or act of God, which directly affects the traveler's home.

G. Travel Supported by Non-PPPL Organizations

1. When another organization is reimbursing all or a portion of the costs associated with a business trip, then one of the following two procedures shall be followed:
 - i. If all travel and reimbursements are administered by PPPL, the traveler is responsible for completing a Travel Voucher, indicate that the expenses will be reimbursed by an outside entity and follow the guidance provided below:
 - a. Include a Letter of Invite, MPO, email or a letter of agreement with the host and note on the Travel Approval Form which, if not all, expenses will be covered by the organization or personally by the traveler. Reimbursable travel expenses may not be charged to a Laboratory project account.
 - b. Indicate on the Travel Voucher those expenses which are to be billed to the other organization and provide an invoice mailing address for the organization, contact name, email address and telephone number. Accounting will invoice the other organization for these expenses.

- c. Endorse over to PPPL any funds provided directly to the traveler by the other organization and attach the check to the Travel Voucher. Provide a brief explanation if payment was made upon departure.
 - ii. If all travel and reimbursements are administered by the other organization, the traveler shall repay any travel advances or direct payments issued by PPPL by utilizing a Travel Voucher showing zero travel expenses and the balance due to PPPL.
2. Should the reimbursement not cover the total expenses claimed on the Travel Voucher submitted, PPPL will expense the difference to the account indicated on the TAF.
3. Should the reimbursement exceed the covered expenses, PPPL will credit the PPPL project account indicated on the TAF for the difference.
4. When another organization or entity pays for lodging, meals, etc., the traveler must reduce the per diem appropriately.

H. Safety and Travel

Please see <http://travel.pppl.gov> for more information.

V. Post-Trip Requirements/Reimbursement of Travel Expenses

A. Travel Voucher

It is PPPL's policy that Travel Vouchers be submitted within 30 working days after returning from the trip. Failure to submit a Travel Voucher within 60 days of your return may result in loss of PPPL travel reservation privileges until the outstanding voucher is satisfied.

Each voucher is to state the purpose of the trip or its benefit to the mission of the Laboratory. The times and dates of each trip must be clearly and accurately reported. Any portion of the trip that was personal must be noted as such by referencing the dates of both business and personal travel. **TCR-PPPL Travel Manual,R0-001**

NOTE: To avoid delay in travel reimbursement and to ensure the Travel Voucher will be able to sustain future audit scrutiny, all unusual expenses or situations should be explained on the Travel Voucher or in an accompanying memo. Changes to the itinerary made while traveling require an explanation and the approval of the Department Head. Meals offered by a hotel or a conference must be deducted from the M&IE on the Travel Voucher.

Original receipts are required for individual expenses exceeding \$50 that are excluded from the daily M&IE rates. The original merchant receipts are required to document and substantiate business expenses. In the event that a receipt is missing, another proof of payment, such as a credit card statement indicating that the item was charged, must be submitted. Also, a digital image of the original receipt is allowable provided that it is legible. Vouchers may not be emailed or faxed as original receipts are required for payment. Travel vouchers may not be electronically signed by the traveler or approver. If a required receipt has been lost, a missing receipt affidavit, approved by the traveler's Department Head, must be submitted. **TCR-PPPL Travel Manual,R0-001**

VI. Other

A. Tax Considerations

In order to comply with IRS requirements, PPPL has adopted the IRS standards for establishing reasonable time limitations for determining the tax treatment of reimbursements, as follows:

1. If substantiation for the reimbursement is submitted within 60 calendar days of when the expenses were incurred, and if all other requirements of PPPL's Unallowable Cost Guidelines are met, the reimbursement will be treated as a nontaxable reimbursement of a PPPL business expense.

2. If substantiation occurs more than 60 calendar days after the expenses were incurred, the expense reimbursement request must include an explanation for the delay. At the discretion of the Chief Financial Officer or Head of Accounting, reimbursement requests beyond the 60-day limit may be approved, and the reimbursement will be reported to the IRS as taxable income paid to the individual. Note that for expenses incurred while travelling, the traveler will have 60 calendar days upon returning from travel to substantiate and submit the expenses. This does not apply to expenses incurred before the trip (e.g. airfare) which must be substantiated and submitted within 60 days of incurring the expense.

B. U.S. Sales, Occupancy and Other Taxes

1. The University is a non-profit 501(c) (3) institution, and as such is exempt from tax on most domestic purchases. However, tax exemptions vary by state and by type of good or service purchased. PPPL business travelers must make every reasonable effort to ensure that tax is not paid.
2. Currently 27 states do not require Princeton University to pay state sales tax on all or most purchases of goods and services used in that state.
 - i. Use these state certificates for the purchase of goods out-of-state if the intent is to use the goods in that state.
 - ii. Use the New Jersey exemption when purchasing goods in another state that will be shipped to New Jersey.
 - iii. Use the New Jersey exemption in New Jersey for purchases made with your Departmental Credit Card or cash.
3. Requirements and an exemption form are available on the Princeton University site:
<http://finance.princeton.edu/how-to/buying-paying/buying-paying-basics/sales-tax-exemptions/>

C. Insurance Coverage

1. While traveling on PPPL/University business, PPPL business travel accident insurance provides benefits to the traveler or his/her survivors in the event of an accident. There is no cost to the traveler for this coverage. Members of the University faculty or PPPL/University staff on the regular payroll in active employment and those employees in a "visiting" rank, who are specifically directed to travel on behalf of PPPL or the University, are eligible for coverage. Travel on PPPL/University business, as long as the travel is to a site that is off PPPL or University premises and travel expenses are reimbursed by PPPL or the University is covered. (Note: Benefits are not payable if the employee's travel is between Main Campus and Forrestal Campus or within the boundaries of Princeton Borough, Princeton Township, West Windsor Township, and Plainsboro Township unless travel is part of a trip that starts or ends at a destination outside these municipalities).
2. If death occurs as the result of an accident while an employee is on authorized PPPL/University business, the employee's beneficiary will be paid a lump sum equal to five times his/her annual base earnings up to a maximum of \$500,000.
 - i. The amount of the benefit is rounded up to the nearest \$1,000.
 - ii. Beginning with age 60, the amount of the benefit gradually decreases each year until age 70.
3. The following are not covered under this insurance:
 - i. Regular commute to and from work.
 - ii. Suicide, attempted suicide, or intentionally self-inflicted injury, whether the employee is sane or insane at the time.

- iii. Service in the armed forces of any country or international authority.
 - iv. War or an act of war, whether declared or undeclared, which occurs within the geographical limits, territorial waters, or airspace above:
 - a. Traveler's country of permanent residence.
 - b. The United States, Canada, and Iraq, except acts of terrorism.
 - v. Injury or death sustained while being in, exiting, or entering any aircraft owned, leased, or operated by Princeton University, on behalf of Princeton University, or operated by an employee of Princeton University on Princeton University's behalf.
4. Travelers may contact PPPL Human Resources or the PU Risk Management Office for questions regarding this coverage.

D. Spousal and Dependent Travel

Travel and associated meals for an employee's spouse/partner and/or dependents is not an allowable business expense unless pre-approved by the Vice President of PPPL for PPPL employees, or by the sponsor in the case of sponsored research projects.

E. Examples of Unallowable Costs

- Annual fees for personal credit cards
- Babysitting
- Barbers / hairdressers
- Car service for normal commute
- Car washes
- Clothing
- Personal mobile phones
- Delinquency fees
- Hotel or car "no-show" charges
- House sitting
- Luggage and briefcases
- Membership reward fees
- Meals for social occasions
- Non-business membership fees
- Non-business periodicals
- Non-business postage
- Optional baggage insurance
- Parking and/or speeding tickets
- Personal accident insurance
- Personal entertainment (e.g. sporting events)
- Personal property insurance
- Personal toiletries
- Pet care
- Prescription refills
- Shoeshine
- Souvenirs and personal gifts
- Vacation and personal expenses when on business trips

VII. Definitions/Acronyms

Term	Definition
Abstract	A summary statement provided with the Travel Approval Form for conference travel that reflects (1) major highlights, (2) benefits, and (3) results of the trip. Each of the three attributes should be included in the abstract statement.
Affiliates	Non-Laboratory employees engaged in on-site Laboratory activities. Affiliates are subject to training in safety and other subjects. They are also issued a PPPL Lab identification badge. Affiliates may receive system accounts, research access to facilities and a per diem allowance for housing and living expenses. Examples: Facility users, scientific collaborators, students
Allowable expense	A necessary, reasonable and appropriate expense incurred for the primary benefit of Lab business and therefore permitted to be reimbursed or directly charged based on the permission of the University or by the terms of federally or privately sponsored agreements (see Accounting website for additional information).
American Flag Carrier	See U.S. Flag Carrier.
Business Class	A premium class of accommodation offered by the airlines that is higher than coach and lower than first class, in both cost and amenities.
Business travel	Travel for the purpose of conducting business for the sole benefit of the Lab.
Coach Class	The basic class of accommodations offered to travelers regardless of fare paid.
Collision Damage Waiver (CDW)	Covers damage to or loss of a rental car.
Continental United States (CONUS)	The territory of the United States that is within North America, between Canada and Mexico, and the adjacent territorial waters.
Domestic Travel	Travel within United States and its possessions, or travel from a foreign country to the United States.
Employee	An individual who receives a paycheck from the Laboratory.
Excess Baggage	Baggage in excess of the carrier's size and weight limit.
First Class	Generally, the highest class of accommodation offered by the airlines in terms of both cost and amenities and termed "first-class" by the airlines and any reservation system.

Fly America Act	Public law (commonly referred to as the Fly America Act) that, in general, requires that foreign air travel funded with federal dollars be done on U.S. flag air carriers.
Foreign Travel	Travel from the United States to a foreign country (including Canada and Mexico) and return, or travel between foreign countries.
General Services Administration (GSA)	An independent agency of the U.S. Government established in 1949 to help manage and support the basic functioning of federal agencies.
Incidental Expenses	Fees and tips given to porters, baggage carriers, bellhops, hotel maids, stewards or stewardesses. On foreign travel, laundry and dry cleaning are also considered incidental expenses.
Involuntary Denied Boarding	An airline term for a situation in which a passenger is not allowed to board an aircraft due to overbooking, weight restriction, etc.
Itemized Receipt	Detail of specific expenses charged to the traveler, e.g., a lodging receipt reflecting the room rate, taxes, telephone charges, etc.
Local Travel	Travel within a distance of 50 miles (one way) from the traveler's primary work location or residence that will be completed within one calendar day without lodging.
Lodging	Expenses for overnight sleeping facilities. Does not include accommodations on airplanes, trains, buses, or ships, which are included in the cost of transportation.
M&IE	Meals and incidental expenses.
Meals	Expenses for breakfast, lunch, dinner, and related tips and taxes. Specifically excluded are alcoholic beverages and entertainment expenses and any expenses incurred for other persons.
Non-Employee	An individual who is not a Laboratory employee (i.e., does not receive a paycheck from the Laboratory). Includes, but not limited to, interviewees, affiliates, consultants, and subcontractors.
Non-Foreign Overseas	Business points in Alaska, Hawaii and U.S. possessions.
OCONUS	Travel outside the continental United States (i.e., including Alaska, Hawaii, and U.S. possessions).
Official Laboratory Travel	Travel necessary to accomplish official business on behalf of the Laboratory. Official travel is properly authorized, processed, conducted, reported and reimbursed in accordance with these guidelines.
Per Diem	Combined daily expenses for lodging and meals & incidental expenses (M&IE). Per diem within the continental United States (CONUS) is set by the General Services Administration (GSA). Per diem within Alaska, Hawaii, and the U.S. possessions (i.e., non-foreign overseas) is set by the Department of Defense. Per diem within foreign countries is set by the U.S. Department of State.
Primary Work Location	The place where the major portion of the traveler's work time is spent or the place to which the traveler returns during working hours upon completion of special assignments.
Reasonable Expense	An expense that is ordinary and reflects a prudent decision to incur the expense on behalf of University business. Not extreme or excessive.
Travel Status	The period during which a traveler is traveling on official business.
Unofficial Travel	Travel undertaken by an individual without official, fiscal, or other obligations on the part of the Laboratory, i.e., personal travel.
U.S. (American)	An air carrier that holds a certificate under the Federal Aviation Act of 1958 authorizing

Flag Carrier	operations between the United States and/or its territories, and one or more foreign countries. Each U.S. airline has a two-letter alpha code designating it as a U.S. Flag air carrier (e.g., UA for United Airlines).
U. S. Code Share	An arrangement where an airline is jointly marketed as a flight for one or more other airlines. The term "code" refers to the identifier used in a flight schedule, generally the two-character airline designator code and flight number. One airline places its code on the flights of another in order to coordinate services, advertise and sell the other airline's services as its own. Most major airlines have code-sharing partnerships with other airlines and code sharing is a key feature of major airline alliances. A code-share flight uses the same two-letter carrier code during all legs of the trip.