### Alcoholic Beverages

1. Maximum amount: $20.00 per person with dinner (hosting only).
2. Alcohol is not allowed during work hours and is not allowed to be charged to a Hospital Department without prior approval.
3. Flag with Class X (ICRX) and charge to non-General, non-Federal or non-Sponsored funds. If alcohol appears on a separate bill; charge the total amount to Class X (including tip/tax if charged). If alcohol is part of a meal receipt; charge alcohol amount only to Class X.
4. An itemized receipt is required for alcohol expenses. When possible, obtain a separate receipt for alcohol.

### Air Travel

1. All flights should be booked at least 14 days in advance or include an explanation regarding booking delay. Approvers may deny charges that result from last minute booking.
2. Cancellation insurance for travel is a valid business expense.
3. Class of the flight must be economy or coach. When there is an exception, attach higher authority approval to the expense report and add a note in the Comment field regarding the exception. Exceptions include:
   - Non-stop travel exceeding eight hours (non-stop flight). If the flight offers first-class and business-class, the employee must fly business class. If the flight only offers first-class, that may be purchased.
   - When accompanying a major donor or dignitary.
   - Health issues; it is not required to disclose the health issue.
   - When a higher class is less than a coach fare on the same day; proof must be printed and attached to a memo requesting approval, but the fare may be booked without pre-approval.
4. Employees should travel with their University of Michigan identification badge.
5. Flight changes require explanation of business purpose and approval.
6. Premium Seats: As long as the receipt does not list first class or business class, premium seat upgrades are allowable.
7. Priority Boarding: Fees for priority boarding are not considered a valid business expense/not reimbursable.
8. Receipts: A receipt is required and must show dates of travel, method of payment, and class of flight.
9. Upgradeable tickets: Using miles to upgrade is allowable. Receipts are required for non-business purposes.

### Baggage Fees: The University will reimburse an employee for a maximum of two pieces of checked baggage.

### Concur - Report Names

**Report Name Format of Travel Reports**: Date of return (YYMMDD) / 3-character airport code (destination city)

**Report Name Format for other Expense Reports**: Date of submission (YYMMDD) / EXP (Expense Report)

**Required format for travel expenses**

- Each business trip must be submitted in a separate expense report (do not mix expenses from different trips into one report). Business trip reports may include other misc. expenses that are not related to the trip.

### Conference Fees: See Trip/Event Documentation.

### International Travel

1. Foreign currencies: Concur automatically converts foreign currency to US Dollars for reimbursements.
2. International Travel SPG: [http://spg.umich.edu/policy/601.31](http://spg.umich.edu/policy/601.31)
3. Faculty, staff, and students are required to register their international travel details. See Travel Registry.

### Internet Access

- On a business or personal trip is an allowable expense and not part of the incidental allowance.

### Lodging

1. Itemized hotel bills are required.
2. Expense should be the standard rate. Inquire about government, Big Ten Consortium, and conference rates.
3. Procurement Services recommends hotel accommodations as opposed to Airbnb, Home Away, VRBO, etc.
4. Meals (Hosted): A clear business purpose and list of attendees with University affiliation must be included.

### Meals

1. Itemized receipts for all meals are required.
2. Maximum allowable reimbursement per person:
   a. Breakfast: $25.00
   b. Lunch: $25.00
   c. Dinner: Meal: $55.00 Alcohol: $20.00 (with dinner)
3. The Medical School will allow one annual Holiday event to recognize all staff of a particular work area.
4. Tips may not exceed 20% (anything over 20% must be marked as personal).
5. Spouse/companion meals are generally not allowable expenses. Exceptions include the following: a recognition event (a Holiday event is considered a recognition event) or when the spouse of a visiting professor or recruitment candidate is present.

### Mileage (Local in-town mileage is not allowed)

**Current reimbursement**: 58 cents/mile as of 01/01/19

1. Mileage to Detroit Metro Airport: Use 9000 Middlebelt Rd. Romulus, MI/work address in Concur.
2. All mileage submissions are to be calculated from the University address to the off-site location unless the mileage from home to the off-site location is less than the University address to the offsite location.
3. A mileage log may be found at: [http://www.procurement.umich.edu/forms.html](http://www.procurement.umich.edu/forms.html) (Under Travel & Expense). It is recommended to attach a mileage log for multiple trip mileage reimbursements.

### Passport / Visa Fees

- Passport fees are no longer considered valid business expenses. Visa fees are covered.

### Personal Time During Business Trips

- Receipts for expenses less than $75 are still required.
- Exceptions: 1) Receipts for meals & incidentals during travel (per diem), 2) Mileage.

### Reimbursements

- Reimbursements should be submitted no later than 45 calendar days of the trip/event/purchase or the reimbursement may be taxed (as taxable income).

### SPG Reference for Travel

- [http://spg.umich.edu/policy/507.10-1](http://spg.umich.edu/policy/507.10-1)

### Third Party Reimbursements

- When a third-party reimbursement is expected, expenses should be charged to a personal credit card; not to University funds.

### Transportation

1. Car rental: A business purpose is required in writing; itemized receipt/rental agreement is required.
2. Taxi/Shuttle: Allowable: to/from home/airport, airport/hotel, and between business locations during travel.
3. Gasoline is reimbursable for University cars or rental cars.
4. Itemized receipts are required for non-taxi transportation.
5. Non-airfare transportation is allowed at the lesser amount of mileage reimbursement or the standard coach airfare equivalent from Detroit Metro Airport with proof of comparison submitted with the expense report.

### Travel/Cash Advance

1. Travel/cash advances may be requested on an exception basis for reasonable anticipated travel expenses.
2. Travel/cash advances are processed through Concur.
3. Any portion of an advance that was not used must be returned to the University as soon as possible, but not later than 45 days after completion of the trip or event. If this deadline is not met, the employee's paycheck will be reduced by the amount of the advance.
4. Minimum advance: $300 for faculty and staff.
5. Travel/cash advances are not issued to P-Card holders.

### Travel/Event Documentation (Supporting Travel Documentation)

1. Registration fees: Receipts are required and must be reconciled as part of a travel expense report. Receipts are also required for local conference/meetings when travel is not.
2. Supporting travel documentation is required for all business travel to show business purpose, conference/event dates, location; e.g., conference registration form, agenda, brochure, etc.

### Meals (During Travel)

1. Travelers will be reimbursed a per diem rate for travel days; the rate is determined by the location destination.
2. Receipts are not required to be submitted to receive the per diem allowance.
3. Travelers pay for meals, snacks, and beverages during travel and are reimbursed the per diem allowance after completion of the trip/event. If a traveler cannot afford to pay for their meals during travel an advance may be requested.
4. Any meals covered by another source must be documented, which will lower the per diem rate. Examples include meals provided at a conference or when the employee hosts or is hosted by another (non-U of M employee) party while on travel status.
5. P-Cards or ATM Withdrawals should not be used for travel meals and incidentals.
6. On travel days, the traveler cannot exceed 75% of the daily total by the 100% allotment toward meals.
7. Incidental covers fees and tips to baggage carriers, bellhops, hotel housekeeping, discounts, or sundarwells, and hotel staff, transportation between places of lodging and restaurants.
8. Hosting U of M employees only is not allowed during travel.

### NOTE: BLUE SHADING INDICATES STRICTER GUIDELINES THAN UNIVERSITY POLICIES

2019 Updates in Red

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Contact: Robin Fox; 647-6390 or e-mail robinfox@umich.edu  
Document location: [https://msa.med.umich.edu/helpful-lists-links-documents](https://msa.med.umich.edu/helpful-lists-links-documents)  
Last Revision: March 5, 2019