

Important Reimbursement Information

The Division of Surgery Education (DSE) in accordance with The University of Pennsylvania Health System (UPHS) policy* will reimburse expenses for all employee business travel as required in the fulfillment of their assigned responsibilities on behalf of UPHS. Certain payments (ie Conference Registration) can be made in advance of the travel dates, while others may be paid after the completion of the travel. All expenditures made by employees will be reimbursed in accordance with this policy and the process/procedure covering employee reimbursements.

**UPHS entities or Departments may, at their discretion, impose greater control than required by this policy.*

Local Travel is defined as travel less than a 90-mile radius from the employee's primary worksite for one day events and 60 miles for multiple day events.

Out of Town Travel is defined as travel over a 90-mile radius from the employee's primary worksite for one-day events and 60 miles for multiple day events.

Proper supporting Documentation

- Proper supporting documentation is evidenced by detailed receipts for all reimbursements and include the following: 1) purpose, 2) date, 3) location and 4) other attendees and their affiliation if applicable

Qualifying Expenses

- Travel expenses will be paid by UPHS/DSE for each business day** of the associated training session, seminar, conference or meeting plus one additional day, if necessary for reasons of travel logistics, (i.e. flight restrictions, west coast or overseas travel etc.) Additional day(s) expenses, others than previously addressed, are the responsibility of the employee. **ALL conferences for clinical and non-clinical Housestaff must be pre-approved. Travel will not be reimbursed without appropriate pre-approval form. Pre-trip forms must be submitted to your coordinator as least 30 days prior to your trip.**

***Business Day for Poster presentations is defined as the day that a poster is presented, plus one additional day of travel for arrival prior to the presentation and one day after, if necessary, for travel home. Business Day for Podium presentations is defined as each day of the associated training session, seminar, conference or meeting plus one additional day of travel for arrival prior to the presentation and one day after, if necessary, for travel home.*

- Documentation supporting the number of days of the event must be provided, usually the conference brochure or training schedule, data must include the purpose, location and dates of the event. Please also include your name badge from the event.
- Travelers must submit email confirmations regarding acceptance of papers/abstracts or invitations to present.
- DSE will not pay for travel incurred by non-employees (spouse or dependents).
- DSE will reimburse the employee for reasonable meals while traveling on behalf of UPHS.
- Registration will only be reimbursed at the resident/fellow rate.
- Late registration fees will not be reimbursed.

Responsibility of the Traveler

- Compliance with the Health System's policies governing business travel.
- **To be financially conscious with respect to transportation, lodging and meals costs, and by selecting the lowest air or rail fare offered, considering the time, location and other relevant factors.**
- The traveler must reconcile all travel payments and out-of-pocket expenses, preferably within thirty (30) days but no later than ninety (90) days after the completion of the travel or the date of the event. Employee reimbursement requests submitted after 90 days will require approval from the entity CFO.
- Employees are expected to neither lose or gain financially when traveling on official Health System business.

Telephone and Computer Connection Charges

- Please see the Department of Surgery Mobile Device Policy for rules regarding UPHS telephone usage and charges.
- DSE will reimburse employees for costs associated with computer use or connections required to conduct UPHS business.

Airline Ticket Purchase/Reimbursement Guidelines

- The mode of airline travel is expected to be the least costly consistent with the itinerary and particular Health System business involved. In an attempt to seek out the most convenient schedule at the lowest fare, the traveler should:
 - Search for the least expensive logical flight using a 3-hour window before and after the required arrival and departure times
 - select low cost carriers and/or consolidator fares
- Every attempt should be made to purchase airline tickets during announced airfare discount periods or as early as possible to ensure the lowest possible fare.
- DSE does not reimburse for Business or First Class travel.
- DSE does not reimburse for seat selection.
- Traveling employees may retain frequent flyer program benefits. However, participation in these programs must not influence flight selection, which would result in incremental costs to the Health System before the lowest airfare. The Health System will not reimburse travelers for tickets purchased with frequent flyer miles.
- DSE will reimburse for air phone or internet connectivity usage
- Air fare receipts must indicate the cost of the airline ticket, the taxes and fees and the total amount of the ticket
- Service fees charged by travel agencies and travel websites are reimbursable
- Baggage Fees are reimbursable, up to one checked bag and one carry on per traveler

Cancellation of Travel Plans

The Health System may seek reimbursement from the employee for any non-refundable or non-reusable items/expenses if the employee cancels the trip. If the Health System cancels the trip, the employee is not responsible for any prepaid expenditures. If a trip is cancelled, every effort should be made to use or apply the value of all or part of a non-refundable ticket to a future trip within the section, department, or entity.

Ticket Changes

Changes to tickets as a result of UPHS need, will be reimbursed to the employee. Changes to tickets solely for the convenience of the employee are not considered appropriate expenses and will not be reimbursed. The Health System will reimburse individuals for change or cancellation penalties imposed by the airlines provided the change or cancellation was caused by unavoidable circumstances. A written statement explaining the change(s) must be attached to the Employee Expenses Report.

Ground Transportation

The most economical mode of transportation, such as shuttle services, should be used to and from air, rail, or bus terminals, whenever possible.

Personal Vehicles

Employees may use their personal vehicle for business purposes if it is less expensive than other options, such as taxis, or it saves time. It is the personal responsibility of the owner of a vehicle being used for business to carry adequate insurance coverage for their protection and for the protection of any passengers. Employees driving their own vehicle are responsible for any expenses incurred.

- The Health System will reimburse a mileage rate calculated on a per mile basis for the actual miles traveled. This mileage rate covers all transportation and operating costs of the vehicle, including fuel. For the latest rate please visit: <http://pennpoint.uphs.upenn.edu/sites/Finance/DISB/default.aspx>
- Travelers using their own vehicles should enter the to and from destination into the Google Maps feature of Chrome River. This feature will calculate the mileages traveled and calculate the reimbursement amount.
- Reimbursement will not be made for vehicle repair costs, regardless of whether the costs result from the traveler's act or the act of others.
- Travelers who choose to use their own automobiles on a trip where air or rail travel is more appropriate will be reimbursed an amount not to exceed the least expensive, logical air or rail fare to the destination.
- Parking and Tolls will be reimbursed. Please keep in mind hotel parking fees, and toll expenses when comparing the costs of personal vehicles to air and rail fare.
- Expenses associated with normal commuting between and employee's home and primary place of business are not reimbursable.

Public Transportation

- DSE will pay for travel costs such as SEPTA passes for those traveling locally on authorized activities.

Taxi/Ride Sharing Services

- Taxis and Ride Sharing services that are taken for Health System business are a reimbursable expense.
- Private Sedan or Limousine Services will not be reimbursed.

Rail Travel

- Reserved and Unreserved Coach Class commuter trains on the northeast corridor should be used for Amtrak or NJ Transit Travel.
- Acela Trains may be considered between Philadelphia and destinations north of New York, such as New Haven and Boston, as it may be more cost effective than the purchase of airline tickets. These trains should only be used when time is of the essence. With prior approval from DSE, “Express Business” may be considered an acceptable class of service. “Express First” class on Acela Trains is not reimbursable.

Rental Cars

- DSE does not reimburse for rental cars.

Hotel/Lodging

- Travelers will be reimbursed for standard rooms in non-luxury hotels.
- Travelers should take advantage of negotiated rates such as those offered by the conference or host organization.
- DSE will reimburse a traveler for the following expenses incurred during a hotel stay:
 - Single room rates acknowledging that most hotel prices are based on double occupancy
 - All business telephone calls
 - Luggage storage and tips for service
- DSE will not reimburse a traveler for the following expenses:
 - In-room video or game rentals
 - Health club charges
 - Laundry and dry cleaning charges
 - Costs incurred for failure to cancel hotel reservations
- The hotel receipt showing the breakdown of expenses is required. Receipts must show method of payment.

Personal Meal Expenses

Personal Meals are defined as meal expenses incurred when traveling on an out of town business trip or at a local conference/seminar, etc. Travelers will be reimbursed for personal meal expenses, provided they are documented and reasonable. UPHS provides \$90 per day for meals (Note the Federal maximum rate in 2018 was \$64 per day in Philadelphia and \$74 per day for New York City.) *See Breakdown:*

- \$15 for breakfast plus tip (not to exceed 20%)
- \$25 for lunch plus tip (not to exceed 20%)
- \$50 for dinner plus tip (not to exceed 20%)
- Travelers must submit itemized meal receipts.
- Alcoholic beverages will not be reimbursed.
 - DSE reserves the right to request additional information regarding meal receipts and make final determination of eligibility for reimbursement