



COVID 19: Travel Reimbursement Guidelines

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Stony Brook University follows State and Research Foundation policies regarding travel reimbursement. Due to challenges associated with COVID-19, this document contains important information, links, commonly asked questions and contacts.

Due to increasing case counts in the U. S. and abroad, university-related travel remains strongly discouraged. Travel can increase the risks of exposure to the traveler and the entire campus community. As government restrictions and public health measures are changing rapidly, those changes may make it hard for the traveler to return to campus and resume activities

Prior to Booking Travel

Please check Stony Brook's **Coming Back Safe and Strong website** for up-to-date travel guidance. Here is the link: <https://www.stonybrook.edu/commcms/comingback/travel.php>. All travelers must follow NYS guidance for quarantine upon return to campus.

Effective March 16, 2020, pre-approval is required for all University-sponsored travel, this includes registering for conferences that have a travel component. The Travel Pre-Approval Form can be found on the Procurement Forms and Publications web page: <https://www.asa.stonybrook.edu/asa/ASAForms/Department/PROC/Document/PROCF0005>.

This form must be submitted along with your travel voucher when requesting reimbursement. When requesting a direct vendor payment for conference registration fees, please attach a copy of this form to your non-encumbered payment request in WolfMart.

Travel undertaken without the appropriate pre-approvals will not be reimbursed, and other disciplinary actions may apply.

EFFECTIVE JULY 7, 2020

The following trips **do not** require pre-approval:

- Travel to Brookhaven National Lab,
- Travel to other SBU locations
- Regional travel (less than 100 miles)
- Travel to domestic locations for research on externally-sponsored grants for which travel is essential to project objectives and allowed by sponsoring agency.

For travel on sponsored research awards, it is the responsibility of the PI to ensure that travelers comply with NYS guidelines. Here is the link: [https://coronavirus.health.ny.gov/covid-19-travel advisory](https://coronavirus.health.ny.gov/covid-19-travel-advisory) for the most current notices and information on exemptions for essential workers.

For State-funded Travel

If a trip is cancelled at the direction of the agency or due to a conference/event cancellation, the traveler will not be responsible for any costs incurred. If a trip is cancelled for the traveler's convenience, he or she may be responsible for any costs.

State travel manual:

<https://www.osc.state.ny.us/agencies/travel/manual.pdf>

For RF Travel on Externally Sponsored Awards

This guidance reflects current information from federal funding agencies, which indicates that award recipients should continue to follow all relevant policies and procedures and to apply these practices consistently. As new information becomes available, we will disseminate to our research community

For travel on externally sponsored research awards to domestic locations which is essential to project objectives and goals, it is the responsibility of the PI to ensure that travelers comply with NYS guidelines. However, travelers should consult [https://coronavirus.health.ny.gov/covid-19-travel advisory](https://coronavirus.health.ny.gov/covid-19-travel-advisory) for the most current information.

Faculty, staff and students traveling on Research Foundation funds must also obtain approval from the Research Foundation Operations Manager by submitting a request through the [eFTR system](#), prior to International travel, per Research Foundation policy.

As a reminder, all travelers are strongly urged to purchase refundable airline tickets when making travel arrangements, so that if or when a trip is cancelled, the only cost incurred would be the potential cancellation fees. Unused nonrefundable airline tickets cannot be charged to sponsored awards.

If a trip is cancelled and nonrefundable tickets were purchased, every effort should be made to obtain a credit for the cancelled travel with the respective carrier. If the airline carrier agrees to a credit, and an alternate directly related travel event can utilize the credit within the active award period, the cost can be included in the travel reimbursement request for that trip.

If travel arrangements were made through Euro Lloyd, contact them immediately to determine what options may be available through their services.

In the instance where the respective carrier will not issue a refund or when a credit cannot be used for other related research travel, Principal Investigators should seek approval for reimbursement from the sponsor, specifically from the financial official for their sponsored award. This approval from the sponsor should clearly articulate that the charges for the cost of tickets and/or associated fees related to the cancellation are allowable.

Trip Cancellation Insurance

Reimbursement is allowed for protection against changes in travel plans, for example, airfare refundable insurance, provided it is reasonably cost-beneficial.

Travel Insurance

While traveling internationally on RF business, employees and their immediate family members may be covered under the RF's blanket international travel assistance coverage, subject to the limitations and exceptions when using the RF's International insurance program. For additional information, refer to the RF's [International Travel Assistance](#) web page.

RF travel manual:

https://www.rfsuny.org/media/RFSUNY/Policies/travel_handbook.pdf

***Personal Vehicle Mileage Reimbursement**

In accordance with OSC and RF travel guidelines, travelers are responsible for ensuring the most economical method of travel is used in the best interest of the agency. However, it is recognized that employees may prefer to use a personal vehicle for business purpose travel during this unprecedented time. Accordingly, employees in travel status with travel events that took place on March 17, 2020 or later, are eligible to receive the full personal mileage reimbursement in accordance with the [GSA rate](#). Employees should note the justification on their travel voucher as "due to COVID-19" and must also obtain supervisory approval to use a personal vehicle for business purpose travel (except for travel on externally sponsored awards).

Please note, during these unprecedented times, rental companies such as Enterprise and Hertz have taken additional safety measures in alignment with guidance from health authorities.

Department Responsibilities

- Assess all planned travel related to university business.
- Track and provide proper documentation for traveler reimbursement if university business travel has been cancelled.
- Track all reimbursed flights to ensure staff use the credit(s) from any unused tickets for SBU business travel within a year of the original booking date.
- Recover university funds in the event that an individual has been reimbursed and the credit is later used for personal use.
- Track all cancelled conferences. **If a conference is cancelled and the registration fee is refunded, the refund check must be sent to the Travel Office along with a copy of the original voucher so that the funds can be credited back to the Department's account.** If the registration fee is credited, ensure that staff use the credit(s) for future use.
- Obtain and provide necessary unit approvals and reimbursement request documentation. **All reimbursement requests due to cancelled travel must include a detailed explanation, and supervisor approval.**

Commonly Asked Questions

Check back often, as we will add commonly asked questions about travel reimbursements related to COVID-19 concerns.

Do I need to complete the Travel Pre-Approval form?

Yes, regardless of funding source or dollar amount, all travelers are required to complete the travel pre-approval form, exceptions noted below:

The following trips do not require pre-approval:

- **Travel to Brookhaven National Lab,**
- **Travel to other SBU locations**
- **Regional travel (less than 100 miles)**

Travel to domestic locations for research on externally-sponsored grants for which travel is essential to project objectives and allowed by sponsoring agency

Approval of Supervisor or Department Chair, Dean or Vice President and Provost or Senior Vice President is required before booking any travel arrangements and/or registering for any conferences that will include travel reimbursement.

Should I book travel for upcoming university business?

Before you make travel plans, consider the following points:

- Several countries identified by the [U. S. Department of State](#) have received elevated travel advisory levels (i.e.: those above Level 2). Please note that ***any planned travel to these countries is prohibited*** and will not be reimbursed. Other administrative actions may be pursued if travel is undertaken without the appropriate pre-approvals.
- Visit CDC website for the latest CDC travel advisories.
- Consult your unit leadership for further guidance.

My conference was cancelled, what should I do?

- Contact the conference organizer directly. They may offer a refund or rollover to a rescheduled date. If you made your lodging reservation through the conference, then they may have information regarding refunds. You might not be issued a refund, but rather, a credit that will need to be applied for future business-related travel.

What if I receive a refund check for expenses for which I had already been reimbursed, due to a cancelled conference?

- Send the check(s) along with a copy of the original voucher to the Travel Office so that your Department's account can be credited.

What steps should I take if I need to cancel my airfare purchased with personal funds?

- If you made your reservations through a travel agency, we recommend you contact them to cancel your reservations.
- If you booked your airfare directly with the airline, please contact the airline for their refund policy. Many vendors in the travel industry are permitting cancellations absent the traditional cancellation fees.
- If the airline issues you a credit for a future flight, you may choose to submit for airfare ticket reimbursement now, but must use your credit within the timeframe determined by the airline.
- If you reschedule your flight for future university travel and incur change fees, the university will reimburse for these costs. After receiving reimbursement, should this ticket be used for personal travel at a later date, you must then return the funds that were reimbursed by the University for that ticket.
- Please refer to New York State travel policy (<https://www.osc.state.ny.us/agencies/travel/manual.pdf>) or Research Foundation travel policy (https://www.rfsuny.org/media/RFSUNY/Policies/travel_handbook.pdf) for supporting documentation required for reimbursement dependent upon funding source utilized.

What steps should I take if I need to cancel my airfare purchase using a State Travel or NET account or RF BTA account?

- If you made your reservations through Euro Lloyd, we recommend you contact them to cancel your reservations.
- If you booked your airfare directly with the airline, please contact the airline for their refund policy. Many vendors in the travel industry are permitting cancellations absent the traditional cancellation fees.
- If the airline issues you a credit for a future flight, you must use your credit within the timeframe determined by the airline.
- If you reschedule your flight for future university travel and incur change fees, these may be charged to the State Travel or NET account or RF BTA account.

What steps should I take if I need to cancel my lodging?

- If you made your reservation with a travel agent, we recommend you contact them to cancel your reservation.
- If you made your reservation directly with the hotel or lodging host, contact them directly to determine what their cancellation policy is. Many vendors in the travel industry are permitting cancellations absent the traditional cancellation fees.
- Please refer to New York State travel policy (<https://www.osc.state.ny.us/agencies/travel/manual.pdf>) or Research Foundation travel policy (https://www.rfsuny.org/media/RFSUNY/Policies/travel_handbook.pdf) for supporting documentation required for reimbursement dependent upon funding source utilized.

I need to cancel my rental car, what should I do?

- If you made your reservation with a travel agent, we recommend you contact them to cancel your reservation.
- If you did not use a travel agency, contact the car rental agency directly to inquire about the cancellation policy. Many vendors in the travel industry are permitting cancellations absent the traditional cancellation fees. In the event the car rental agency issues a credit to be applied for future travel, it is the unit's responsibility to track and utilize the credit.

Can I purchase refundable airline tickets?

- Before booking any state funded future travel, please consult with your unit leadership about the most reasonable option. When unsure if the business purpose for the travel might be cancelled, but it is still necessary to book the trip, purchasing a refundable ticket may be the most reasonable and economical way to secure your airfare.
- The Research Foundation strongly urges the purchase of reimbursable tickets as part of their normal business.
- If a refundable ticket is purchased, please note "due to COVID-19" as the purpose for the additional expense.

Can I purchase travel insurance and be reimbursed for the cost?

- Trip Cancellation Insurance is an option. Please refer to Research Foundation policy https://www.rfsuny.org/media/RFSUNY/Policies/travel_handbook.pdf for more details.
- If you are using RF funds, and purchase Trip Cancellation Insurance, reimbursement is allowed for protection against changes in travel plans, provided it is reasonably cost-beneficial.
- Consult with your unit business office when travel insurance might be necessary and if SBF funds may be utilized for reimbursement. Proper written documentation and approval from the unit business officer will be required.

Can I reimburse a guest's airfare expense if they decide not to travel due to concerns related to COVID-19?

- Guest travel is reimbursable based on the expectation that the airfare credit issued will be used for future university travel. It is the unit's responsibility to document and track this credit usage.
- If the individual has been reimbursed and the credit is later used for personal use, the unit is responsible for recovering the funds from the individual.

Contacts

Help for Travel Using State or RF Funds

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