

GW Travel Tips

-Expense Review

Faculty, Staff and Students incurring travel and business related expenses that are funded or reimbursed by The George Washington University should familiarize themselves with the [Travel, Entertainment and Business Expense Reimbursement Manual](#)

[The Travel, Entertainment and Business Expense Reimbursement Manual](#) supports the university's [Travel, Entertainment and Business Expense Reimbursement Policy](#) and will guide you through GW's travel acquisition process and reimbursement procedures.

Plan Travel

- Review the University Travel, Entertainment and Business Expense Reimbursement Policy
 - Know the account number(s) to which expenses will be charged
 - Obtain pre-trip approvals when required

Book Travel

- Review special negotiated rates with airlines, lodging and ground transportation providers, using [iBuy+ Travel](#)
 - Review / choose payment method
 - Make reservations / purchase tickets via [iBuy+ Travel](#) or Call Travel Leaders, GW's contract travel agent to make reservations and purchase travel (855-771-9109)
 - Athletics should utilize GW's Athletic travel management company, Anthony Travel for all team travel arrangements. Anthony Travel's dedicated agent is reached by calling 909-321-3589.

Prepare to Travel

- Know what documentation is required for reimbursement (see [ExpenseFAQ's](#))
- Review Health and Safety Travel Assistance services provided by GeoBlue (see [GW Risk Management website](#))
 - Packing Tips (see [Rick Steves](#))
 - TSA travel tips (see [TSA website](#))

During Travel

- Use Concur mobile app to manage expenses (see [installation instructions](#)) Collect receipts and use Concur mobile app to take an image of each receipt (if not using the mobile app, you can still use a smartphone to take an image of each receipt and email image(s) to receipts@concur.com) Missing receipts should be an infrequent occurrence.
 - Keep track of mileage for any personal vehicle use for GW business
 - Note whether a conference provided any meals
 - Indicate amount spent on alcohol on receipts if applicable

After Travel or Expense

Submit your expense report via [iBuy+ Expense](#). Expense reports should be submitted for approval within 30 days after completion of travel for timely expense reporting.

- Out-of-pocket expenses related to travel must be submitted no sooner than the first day of travel (except for travel arrangements booked via the [iBuy+ Travel Portal](#)) and no later than 60 days following the last day of travel. Out-of-pocket expenses submitted more than 60 days after completion of travel will not be reimbursed.

- Any other requests such as airfare class that are an exception to the Travel and Entertainment Policy or procedures found within this Manual must contain prior written approval from a vice president or dean for processing with a business justification for the cost. The approval document must be attached to the expense report along with the receipt.
- Clear any advances and/or return unused advance funds by filing a report through iBuy and repaying the university as needed.)

THE GEORGE
WASHINGTON
UNIVERSITY
WASHINGTON, DC

Documenting the Business Purpose:

If the information is not already provided through other supporting documentation, a well written business purpose should answer the following questions:

Who, What, Where, When, Why



GW travelers are requested to use the [iBuy+ Travel Portal](#) or GW's travel agent Travel Leaders for assistance with air, rail, hotel, and car rental needs. Travelers with international or complex itineraries are urged to contact Travel Leaders directly for assistance at (855) 771- 9109.

Travel Account Codes Clarification

To record *airfare* expense:

53101 - US AIRFARE EXPENSE

53145 - NON US AIRFARE EXPENSE

Use for Class upgrade (remember prior approval!)

Wi-Fi, baggage, extra leg or seat selection should not be charged to this account, but to *Other Travel & Related Expense*

To record *transportation* expense:

53103 - US LOCAL TRANSPORTATION

53147 - NON US LOCAL TRANSPORTATION

To record *taxi*, bus, van, limousine, ferryboat, train, subway, and *mileage reimbursement* for use of private car.

Not to be used for *fuel* nor for *parking*

To record *rental car* expense:

53105 - US RENTAL CAR EXPENSE

53149 - NON US RENTAL CAR EXPENSE

Include fuel charges for the rented car

Parking should not be charged in this account, but under *Other Travel & Related Expense*.

To record *other travel* expense:

53111 - US OTHER TRAVEL AND RELATED EXPENSE

53112 - NON US OTHER TRAVEL AND RELATED EXPENSE

Travel related expenses incurred that do not fit into any other expense category

Travel Account Codes Guidance

Account Codes		GW Staff	GW Student	Non-GW
Domestic	53101 - US Airfare Expense	●	●	
	53102 - US Business Meals	●	●	
	53103 - US Local Transportation	●	●	
	53104 - US Lodging Expense	●	●	
	53105 - US Rental Car Expense	●	●	
	53111 - US Other Travel & Related Expense	●	●	
	53132 - Trainee Travel		●	
	53131 - Travel Non-GWU Personnel			●
	55112 - Consultants Travel			●
	International	53112 - Non US Other Travel & Related Expense	●	●
53149 - Non US Rental Car Expense		●	●	●
53148 - Non US Lodging Expense		●	●	●
53147 - Non US Local Transportation		●	●	●
53146 - Non US Business Meals		●	●	●
	53145 - Non US Airfare Expense	●	●	●

Special Note on International Travel: All expenditures (going to and returning from a foreign location of activity) must be coded to the "Non US" account.

THE GEORGE WASHINGTON UNIVERSITY
WASHINGTON, DC

FLY AMERICA ACT EXCEPTION FORM

Applicable for Federal Funded Sponsored Projects **ONLY**

In order to document a waiver of the restrictions of the Fly America Act (49 U.S.C. 40118) under 41 CFR Part 301-10, please provide the information at the top of the form and check the applicable statement box(es) below. This form should be completed prior to purchasing non-U.S. flag carrier tickets to alleviate any concerns about the allowability of flights taken.

Award PTA #:	Traveler Name:
Principal Investigator:	Email/Telephone:
Travel From/To:	Travel Dates:
Foreign Carrier/Flight #:	

FLY AMERICA ACT EXCEPTIONS

All air travel on federal awards must comply with the Fly America Act. In some instances, you may use a non-U.S. flag air carrier if it meets one or more of the exception criteria listed in the Federal Travel Regulation (FTR) guidelines sections 301-10.135-138. Please check all applicable boxes below where exception criteria are met. Please note that lower cost and personal convenience are not acceptable criteria for justifying the non-availability of a U.S. flag air carrier.

- I. If traveling to and from the United States, and a U.S. flag air carrier offers nonstop or direct service (no aircraft change) from your origin to your destination, you must use the U.S. flag air carrier service unless such use would:
 - Extend travel time, including delays at origin, by 24 hours or more.
- II. If a U.S. flag air carrier does not offer nonstop or direct service from your origin to your destination for travel between the U.S. and another country, or if travel is solely outside of the U.S. and results in one of the following:
 - Use of a U.S. flag air carrier increases the number of aircraft changes you must make outside of the U.S. by 2 or more.
 - Use of a U.S. flag air carrier extends your travel time by 6 hours or more.
 - Use of a U.S. flag air carrier requires a connecting time of 4 hours or more at an overseas interchange point.
- III. Use of a Foreign air carrier is necessary if one of the following applies:
 - For medical reasons when the use of foreign carrier service is necessary to reduce the number of connections and possible delays in the transportation of persons with medical disability. A written statement by a competent medical authority stating that special accommodation is necessary must be attached to this form and must be submitted and approved by EEO/ER prior to booking travel. Send documents to: seo@gwu.edu. For more information please see [Fly America Act and Open Skies Agreements Guidance](#).
 - Seat on U.S. flag air carrier in authorized class of service (lowest economy fare) is unavailable; seat on foreign air carrier in authorized class of service is available
 - Short-distance travel on a foreign carrier is three hours or less, and use of U.S. flag air carrier doubles the travel time
 - No U.S. flag air carrier provides service on a particular leg of the route, in which case foreign air carrier service may be used, but only to or from the nearest interchange point to connect with U.S. flag air carrier service
- IV. Travel meets U.S. Open Skies Agreements with the European Union (EU), Switzerland, Australia, or Japan (Does not apply to DoD funds):
 - Travel on a EU air carrier and point of origin/destination or a layover is one of the 29 EU Countries
 - Switzerland, Australia or Japan: Point of origin/destination was Switzerland, Australia or Japan and there was no city pair contract air carrier in place (<https://cpsearch.fas.gsa.gov/>)

Remember, you must use a U.S. flag air carrier on every portion of the route where it provides service unless an enumerated exception applies.

Certification: I hereby certify that no U.S. flag air carriers meets the Fly America Act criteria at the time of my trip and that traveling on the foreign air carrier was a matter of necessity.

Traveler Signature: _____ Date: _____

Procurement & Travel Services: _____ Date: _____

Please forward the signed form to GW Procurement & Travel Services (travel@gwu.edu) for final certification. Revised: 9/18/19 vci

Fly America Act & Exception Form

Federal travelers are required by 49 U.S.C. 40118, commonly referred to as the "Fly America Act," to use U.S. air carrier service for all air travel and cargo transportation services funded by the U.S. government.

Travelers are expected to use the [iBuy+ Travel Portal](#) or GW's travel agent *Travel Leaders* to ensure:

- Assistance with air, rail, hotel, and car rental needs.
- Compliance with Fly America Act and Open Skies

Travelers with international or complex itineraries are urged to contact Travel Leaders directly for assistance.

Schedule F Reporting

GW is required by the [IRS](#) to report on its activities conducted outside the United States on [Schedule F](#) of its annual tax return. The usage of all the foreign accounts is dependent upon the location of the activity.

If the activity itself ultimately occurs *outside the U.S.*, then the expense should be recorded in the *foreign accounts*. This would *include* expenses such as *transportation from your U.S. home to the airport* on the way to the foreign destination. Any expenses incurred by *non-GW personnel* (i.e., consultants) traveling abroad should *also go in the foreign account*. On the other hand, bringing individuals or companies to the U.S. would go to the relevant domestic account. Questions may be directed to the Tax Department at 571-553-8313 or tax@gwu.edu.

The IRS requires GW to report its activities by the following Region and Country List: Antarctica, Central America and the Caribbean, East Asia and the Pacific, Europe (including Iceland and Greenland), Middle East and North Africa, North America, Russia and the Neighboring States, South America, South Asia, Sub-Saharan Africa

GW TRAVEL TIPS – EXPENSE REVIEW

	Category	Notes and Questions	Documentation Needed
Who	Role/Effort on the Award	<ul style="list-style-type: none"> Was the traveler's salary paid from the award being expensed? If not, is the traveler a graduate student? 	<ul style="list-style-type: none"> If the traveler is not named in the award, documentation is required to support the traveler's affiliation with the project
	Personal Information	<ul style="list-style-type: none"> Does the traveler's name correspond to the expense report and receipts? 	<ul style="list-style-type: none"> This information insures the correct person is getting paid or reimbursed Remind travelers to sign up for direct deposit
	Personal Travel	<ul style="list-style-type: none"> Is personal travel clearly identified? Was reimbursement for business travel only? 	<ul style="list-style-type: none"> Business only comparison at the time of booking (vendor, class of service must be clearly identified) Any extra expenses resulting from travel by indirect route, vacation deviations, or less efficient mode for traveler's convenience will be borne by the traveler
	Group travel	<ul style="list-style-type: none"> Is backup included for all meal/lodging arrangements? 	<ul style="list-style-type: none"> All group travel expenses will be reported at actual cost (receipts required). ---Or--- Cash meal and incidental expense allowance may be paid to group members. Signed statement from group members for amounts or meals received. List of names and amounts signed by each group member when cash is handed out
When	Dates/Times	<ul style="list-style-type: none"> Is travel taking place within the POP? Do the dates on the itinerary (airfare/car rental) match the business purpose? Are travel status times provided? Is personal travel time identified? 	<ul style="list-style-type: none"> Airfare itinerary/receipt Car rental agreement/receipt Conference/Meeting program/agenda Hotel folio/receipt Travel Status start and end times
	Destination	<ul style="list-style-type: none"> Does the destination match the business purpose? 	<ul style="list-style-type: none"> Airfare itinerary/receipt Conference program/agenda Meeting program/agenda Hotel folio/receipt Reason for exceeding 150% noted and approved on reimbursement (e.g. "conference hotel", backup to support limited availability when justification is "only room available"), Consult GSA rates. Travel and lodging expense outside of business days (one day before and/or one day after business) requires justification
Lodging	<ul style="list-style-type: none"> Is the lodging rate either within the approved limits or supported by a justification and approval? Is lodging reimbursement limited to minimum amount of time required to conduct GW business? 		
Where	International currency	<ul style="list-style-type: none"> Is international currency converted correctly? 	<ul style="list-style-type: none"> Foreign receipts must be itemized by type of expense in English Exchange calculation based on the rate as of the expense date. Exchange rates must be attached to expense report. (Automatically calculated in Concur)
	Business Purpose	<ul style="list-style-type: none"> Does the purpose clearly state the intent of business? 	<ul style="list-style-type: none"> One sentence noting business purpose e.g. "Attending AGU meeting/conference," not just "conference". Statement must give a clear understanding of what business is being conducted and why
	Multiple Grants	<ul style="list-style-type: none"> Are the charges split between multiple grants? 	<ul style="list-style-type: none"> Provide justification supporting the basis of proportional benefit or other reasonable method
Why	Benefit to the Award	<ul style="list-style-type: none"> Is there justification as to how the trip specifically benefited the award? 	<ul style="list-style-type: none"> If the travel is either a requirement stated on the award, or clearly documented in the budget justification, no further documentation is required for allowability on the award
	Reimbursable and Non-Reimbursable Expenses	<ul style="list-style-type: none"> Are all expenses allowable per GW Travel Policy and Sponsor Guidelines? Are non-reimbursable expenses identified and reported correctly? 	<ul style="list-style-type: none"> Receipts for claimed expenses greater than \$35 (currently)
What	Unauthorized Expenses	<ul style="list-style-type: none"> e.g. expenses for family members accompanying traveler, expenses due to personal deviation...(Cf. Travel manual) 	<ul style="list-style-type: none"> Business justification if claiming reimbursement
	Airfare	<ul style="list-style-type: none"> Is the class of seating allowable? Is the airfare compliant with Fly America? Is there business justification for change fees? 	<ul style="list-style-type: none"> Airfare itinerary/receipt If non-coach, ADA accommodation Justification? see Fly America and Open Skies Agreements for further details. Business justification required for change fees
	Rental Car	<ul style="list-style-type: none"> Is the rental car for a GW employee? Is the size of car in accordance with regulations? Is the car rental in the best interest of GW? Could a shuttle service be used? Does the car rental include personal time? 	<ul style="list-style-type: none"> Rentals larger than "standard" require justification, e.g. multiple travelers, transport of supplies, etc.; pull "standard" car comparison at time of reservation. Personal time adjusted for any incremental personal cost related to extended term of contract, mileage driven, insurance or fuel cost. Personal expenses deducted, e.g. insurance, frequent flyer fees, fines or penalties for parking or other violations etc.
	Mileage	<ul style="list-style-type: none"> Does the reimbursement match the business destination? Is the use of a private vehicle in the best interest of GW? Is the mileage rate equal to or less than the approved rate? 	<ul style="list-style-type: none"> Either odometer readings or supporting documentation such as a screenshot from Google Maps or MapQuest showing route information (this information is auto generated in Concur) Mileage rates claimed covers all transportation cost (no related expenses, such as fuel, allowed)
	Local Transportation	<ul style="list-style-type: none"> When travel is to a foreign destination, all related expenses should be under the Non-US travel accounts. It is a tax requirement for activities taking place outside of the US. 	<ul style="list-style-type: none"> Example: if travelers took a taxi from their house to the airport in the US, and are traveling to a foreign country, taxi expenditure should be under 53147 - NON US LOCAL TRANSPORTATION.
	Other Transportation	<ul style="list-style-type: none"> Is sponsor prior approval needed? 	<ul style="list-style-type: none"> Boat, Snowmobile, ATV, Motorcycle, Private Aircraft, or other non-conventional modes of transportation require prior approval
	Receipts	<ul style="list-style-type: none"> Are receipts provided for expenses above \$35? Are receipts legible? Do foreign receipts have an annotation in English (e.g. "taxi")? Do receipts match reported expenses? 	<ul style="list-style-type: none"> Receipts with notations as needed (if faint, please note amount, and, write in brief explanation of cost) Receipts must be included in backup. If receipt is lost or misplaced, use lost receipt form
	Account codes	<ul style="list-style-type: none"> Do account codes match the travel purpose? 	<ul style="list-style-type: none"> Using the correct codes allows accurate reporting https://coa.it.gwu.edu/NAccount/Hierarchy?parent=50000&direction=down
	Alcohol	<ul style="list-style-type: none"> Do any expenses include Alcohol? 	<ul style="list-style-type: none"> Ensure that alcohol is removed or charged to department funds unless it is a requirement of the project and is correctly coded under the Entertainment account code (52611)
	Other	<ul style="list-style-type: none"> Are baggage fees standard? Is valet parking fee the only parking option? 	<ul style="list-style-type: none"> Provide justification for baggage fees when excessive Valet parking support, such as a hotel fact sheet is required to substantiate the charge
Other	Prior Approval	<ul style="list-style-type: none"> Does the expenditure require prior approval? 	<ul style="list-style-type: none"> Substantiation of sponsor approval is required
	Travel advances	<ul style="list-style-type: none"> If travel advances were provided, were they reconciled on the expense report? 	<ul style="list-style-type: none"> Traveler should repay advance funds that were not used
	Per Diem	<ul style="list-style-type: none"> Does per diem rate match the destination (based on lodging)? Are provided meals deducted? Do periods claimed match time in travel status? 	<ul style="list-style-type: none"> Hotel folio/receipt Conference program, if applicable Itinerary (e.g. airfare receipt) Exceptions to reductions must be justified in writing The university does not use per diem except in exceptional cases (i.e. international travel, extended stays, etc.) for which approval by an appropriate vice-president or designee has been received prior to travel. The per diem request must include the following: <ul style="list-style-type: none"> GW Sponsored Project Number (PTA) Traveler's name and role on project (i.e., PI, Co-PI, student, etc.) Inclusive dates of travel Travel destination(s) Requested per diem rate(s) for Meals and Incidentals (M&IE)* and Lodging (Please use the Foreign Per Diem Rates by Location as determined by the U.S. Department of State) *Meals & Incidentals Expenses (M&IE): The first and last calendar days of travel are calculated and reimbursed at 75 percent of the approved per diem rate for M&IE. The documented approval must be attached to the traveler's expense report in the GW iBuy+ Expense Reporting system at the time of submission.

Other Travel Supporting Documentation Facts

- Traveler's role in the project and direct benefit
 - Relate the travel with the project activities
 - It can be written in the business purpose or comments section
- Adding personal days to a business trip
 - Evidence on how much it will cost to travel at the beginning/end of the business activities vs the price of your actual booking is needed.
 - Traveler is responsible for the difference if it is a greater price.



When using other transportation options: Comparison prices to demonstrate **economy** in the selected option (E.g. if using train (Amtrak) vs flight)

Airfare Upgrades & Business Meals

All federally funded travel must be booked as Economy Airfare in accordance with Uniform Guidance 2 CFR 200. Individuals requiring travel accommodations other than coach/economy class due to a medical condition should request an accommodation from the Office of EEO & Employee Relations at eeo@gwu.edu or 202-994-9656.

Written pre-approval by the president, a vice president, dean, or their designee is required for any ancillary fee, premium economy or business class fare, including arrangements meeting the criteria of the travel manual. The written pre-approval must be attached to any fare above coach/economy class submitted on the expense report.

Business Meals

- Itemized receipts for meals costing greater than \$75 must be provided
- Correct allocation for alcohol and related (tax and tip related to alcohol charges) : 52611 – ENTERTAINMENT
- Each attendee's name and the *business purpose* must be included in the reimbursement
- Supporting documents:
 - meeting agenda or invitation justifying the business purpose

Allowable Non-Travel Business Meals

- The meeting includes a majority of outside/external participants, AND
- The meal is served at a formal meeting being conducted in a business atmosphere where the provision of the meal serves to maintain the continuity of the meeting, AND
- The activity at which the meal is being served is significant and integral to the goals of the project.

Non-Travel Business Meals Documentation

- Meeting invitation that describes meeting purpose
- Meeting agenda
- Attendee roster
- Description of the activity associated with the meal in the proposal narrative and/or budget justification

Business Meals and Entertainment Allocation Tool

The Business Meals and Entertainment Allocation Tool was created to help individuals determine the correct allocation distributions from Meals containing alcohol charges prior to enter details in the [iBuy+ Expense](#) portal. Business Meals and Entertainment Allocation Tool can be found [here](#).

When to itemize an expense

All expenses in excess of \$75.00 per transaction must be itemized and substantiated, preferably by a dated receipt showing date of purchase, vendor name, itemized list and unit price of the purchased items, and total amount. Supporting documentation such as receipts must be uploaded and attached to the transaction in the iBuy+ Expense Reporting System. Each receipt must be fully displayed.

A lost receipt should be infrequent and unusual, as a copy of a receipt can be requested from the merchant (i.e., hotels, catering, restaurants if the date is provided) and should generally be for small dollar amounts. When an itemized receipt cannot be obtained, the Traveler requesting reimbursement must either use the Missing Receipt Affidavit in Concur or attach a completed and approved [Missing Receipt Acknowledgement and Approval Form](#) to the related transaction on the expense report. If the form is used, the 'Missing Receipt' box on the line must be checked.

An expense must be itemized on the following occasions:

- To itemize Nightly [Lodging expenses](#);
- To separate [legitimate university expenses from personal expenses](#); and
- To assign a single transaction to multiple Expense Types.

How to add attendees in iBuy+ Expense portal:

For an event with 30 or more attendees, the report processor does not have to input attendees individually but a listing of attendees should be attached. If the event is open to the public, attach a copy of the flyer or email that announced the event. Please note that Concur requires at least one attendee to be entered, so even if a flyer / email is attached to the expense line the processor must still input one name in the Attendees field.

For an event with under 30 attendees, the report processor must enter attendees individually or click the Favorites button in the Attendees field to attach an Attendee Group they have saved. To create an Attendee Group, the user can click the Import button. A user can also see existing groups and create new ones by going to iBuy Expense Reporting>Profile>Profile Settings>Expense Settings>Favorite Attendees.