Kempner INSTITUTE
For the Study of Natural & Artificial Intelligence at Harvard University

Kempner Institute Travel Policy

This is an overview of Kempner-specific travel policies which supplement the Harvard policies at the end of this document for more detailed information. When considering individual circumstances, Kempner policy prevails.

Preparing for Your Trip

Before booking your travel contact your administrative coordinator if you have any questions about your travel or if you anticipate a complicated trip (multiple destinations, personal time, departure from a city other than Boston).

- **Use our Travel Request Form. We use the data from this form to book your trip for you and to ensure you are able to be reimbursed.**

Travel-related expenses can only be reimbursed after a trip has concluded. However, we can book parts of your travel ahead of time, i.e. flights, lodging, and conference fees.

You must have documentation demonstrating the business purpose for any trip. This may include a link to the conference agenda, an approved conference abstract or presentation, or an invitation to speak.

Please note, if you have been invited to give a talk, you must check if the organizing institution will cover your travel expenses before requesting travel booking help or reimbursement from the Kempner Institute.

Travel Arrangements

Local Travel:

- Any conference/meeting that is within 50 miles of Harvard University is not eligible for reimbursement.
- This includes meals, travel, or lodging. Registration fees will be covered.
- Transportation between Harvard campuses cannot be reimbursed.

One-Day Travel:

- For one-day travel greater than 50 miles, transportation and registration will be reimbursed.
- However, per IRS regulations, the University can reimburse individual meal expenses for one-day travel when the total trip time is greater than 12 hours. Total trip time is inclusive of travel time and time on the ground. We can only reimburse individual meals with itemized receipts, a per diem is not allowed for one-day travel.

International Travel:

- For international travel, please register your trip with the Global Support Office and upload registration with your reimbursement.
- You will not be reimbursed for your trip without International SOS registration.
- All flight and hotel requirements below apply for international travel.

Personal Days During Your Trip:

- Do not book trips that combine personal and business travel without first speaking with us.
- The overwhelming majority of your travel must be business related or it will not be reimbursed.
- Any personal days, before, during, or after the trip must be clearly outlined and any costs related to personal time (hotel, per diem, car service, etc.) must be removed from the expense report (see example below).

- If you extend travel dates for personal reasons, you must include screenshots of comparison flights. Comparison documentation must:
    - Be with the same airline you book.
    - Show departure/arrival dates without personal travel days.
    - Be taken on the same day (within 24 hours) as your actual flight booking and show a date stamp.
    - A screenshot showing the date on your desktop is acceptable.
- The university will reimburse you the lesser of the two amounts (the actual flight or the comparison).
- If you do not show appropriate comparisons you will not be reimbursed.

See Harvard Travel Policy Appendix E for more details.

Flights

- Economy only at the lowest price for a direct (nonstop) flight out of Boston booked through an American-based/owned airline carrier such as United, Delta, Jetblue, American, etc.
- Flights out of or returning to any city other than Boston **must include a flight comparison** taken on the same day as your actual flight booking (date stamp is required on your screenshot). You won't be reimbursed without this.
- Arrival and departure one day before/after the event is allowable.
- You can include seat selection and one checked bag. Other costs (pre-flight, global entry) are not covered.

A note on cancellations:

- You should request a refund (when a refundable ticket was issued) or request that cost of the unused ticket be applied to a future ticket.
- If you are refunded in travel credits, they should be only used for future business-related travel. Kempner staff will make a note of credits that you have and will use them when booking future flights.
- If flights are changed for business reasons or circumstances beyond your control (e.g. illness), change fees will be reimbursed.
- You cannot be reimbursed for travel credits per Harvard policy.

See Harvard Travel Policy Appendix A for more details.

Lodging

Hotels:

- Standard, single-occupancy room. Room upgrade fees are not reimbursable.
- Travelers are responsible for canceling room reservations when necessary; Harvard will not reimburse travelers for cancellation or "no-show" charges.
- A detailed receipt (hotel folio with your name included) showing proof of payment is required.
- We can reimburse internet connection fees. However, we will not reimburse for any other expenses (e.g., movies, laundry, mini-bar, fees for fitness club, golf, spa, etc.).
- If you will arrive outside of hotel check-in hours (e.g., 10 p.m.), you must let the hotel know to avoid no-show charges. No-show charges are **not** reimbursable.

Short-term Rentals (Airbnb, VRBO):

- Short-term rentals are allowed if they cost less than a hotel in the same location **and** you provide documentation of the cost comparison.
- You should select the most reasonable and economical option; i.e. if an Airbnb is near the conference venue, but costs a little more per night than an Airbnb that is twice as far away, it is considered reasonable and economical to book the closer option.
- If you are sharing a short-term rental with another traveler, please include your name in the booking, when possible. Otherwise, you will need to submit screenshots showing that you have paid for your

portion of the stay. Do not pay for the other traveler.
- To accurately enter the information for reimbursements, please ensure the short-term rental receipt includes rates, fees, and taxes on separate lines. Airbnb typically does not provide an itemized receipt for each night of your stay.

Staying in a private residence (with friends or relatives)

- You may **not** use Kempner funding to pay for or reimburse the cost of a hospitality appreciation gift when staying in a private residence (with relatives or friends) while traveling on business. *(Kempner Institute policy is more restrictive than Harvard University travel policy in this regard.)*

See Harvard Travel Policy Appendix C for more details on lodging (and note that Item 5, on appreciation gifts while staying in a private residence, is not allowed under Kempner policy).

Ground Transportation (including Rail)

- Basic-level Uber/Lyft/Taxis are allowable. Upgrades, e.g., Uber black or limo service, and Rideshare credits (i.e. Uber Cash) are not reimbursable.
- Prior approval is required for rental cars. We generally do not allow rental cars unless they are the only option for travel and are cheaper than any other available option.
- Please include ride locations in your Concur report.
- All rail travel must be for the lowest fare that offers reserved seating. Business or First class travel will only be approved if it is the only option that offers reserved seating.
- **Tip: If you are an employee, connect your rideshare app with Concur to upload receipts to your report instantly.

See Harvard Travel Policy Appendix B for more details.

Meals

- We use per diem for meals. You will receive a lump sum for meals based on the government rate of your travel destination. No receipts are required.
- The first and last travel days are automatically calculated at 75% of the daily rate.
- You must de-select and meals that are provided as part of your registration or if during personal time.
- We do not reimburse for group meals during meetings (aka “business meals”). Please do not pay for meals on behalf of others.
- We do not reimburse for incidentals.

See Harvard Travel Policy Appendix D for more details.

Submitting Expense Reports

Deadlines:

- All expenses must be submitted **within 30 days**.
- Expenses that are submitted and processed late (after 60 days) are taxable. This means you will not be fully reimbursed for the expense as the IRS requires Harvard to tax it.
- If expenses are submitted and processed very late (after 180 days), they will not be reimbursed at all.
- Please be aware of **processing** time. It takes ~10 business days for reports to be processed provided there are no errors. The above deadlines are *inclusive* of processing time.

Submitting Expenses:

- Make sure the **Who, What, Where, When, and How** are accounted for (see examples below).
- Include an explanation that explains how the expense is research-related. It should be clear to a layperson (e.g. external financial auditor) how the expense is business-related.
- Receipts must be itemized to show clearly what you paid for, must clearly demonstrate that it was you who incurred the expenses, and must be legible.

- If the receipt does not have your name or other identifying information on it, then a credit card statement showing the charge with your name may be required. See Harvard's Definition of Receipts policy for more info.
- If there is not enough information that clearly gives context to the purchase, then we will not approve it because central finance will not approve it.
- Please refer to Processing Reimbursements with Concur on how to properly submit your expenses

Booking Your Own Travel

- We urge you to use the administrative team to book your travel.
- However, if you choose to book travel on your own, you **must** comply with all of Harvard and Kempner travel policies.
- **Travel arrangements that do not comply with these policies will not be reimbursed.**

Resources

Examples

- Examples of how to submit clear business purposes within Concur's character limit:
    - CUPA conf reg_Cleveland, OH_5/1-3/23_present paper
    - ChatGPT_mnthly subscription_5/17/24-6/17/24_LLM Proj
    - Flight_BOS-NYC_AAR Annual Meeting_2/21-24/24_prof dev

- If you are combining personal and business travel, please submit a day-by-day breakdown of business vs. personal days as part of your receipts:

Example:

Sun, May 5, 2024	Travel day to conference
Mon, May 6, 2024	Conference
Tue, May 7, 2024	Conference
Wed, May 8, 2024	Conference
Thu, May 9, 2024	Conference
Fri, May 10, 2024	Conference
Sat, May 11, 2024	Personal - exclude from per diem, hotel night
Sun, May 12, 2024	Return travel day to Boston

Links to relevant policies (HarvardKey login needed):

- Financial Policy Office: Travel Policy
- Appendix A: Detailed Guidelines for Air Travel
- Appendix B: Detailed Guidelines for Ground Transportation
- Appendix C: Detailed Guidelines for Lodging
- Appendix D: Detailed Guidelines for Meals, Entertainment and Miscellaneous Expenses
- Appendix E: Guidance for Combined Business and Personal Travel
- Harvard's Definition of Receipts Policy
- Processing Reimbursements with Concur