ICS Travel Guide

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For some more general CU Boulder information about travel on sponsored projects, please refer to: [https://www.colorado.edu/ocg/manage-awards/travel-expenditures-sponsored-projects](https://www.colorado.edu/ocg/manage-awards/travel-expenditures-sponsored-projects)

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PLEASE READ FIRST ME FIRST!

Hi ICS traveler - you’re thinking of traveling on university business - great! Before starting your booking, some quick guidance and a few things to note.

Your **Portfolio Manager** is always your first point of contact for anything travel related!

- **ALL TRAVEL MUST BE AUTHORIZED BEFORE TRAVEL** with an [ICS travel authorization (TA)].

- If you are NOT the PI on the funding source (grant/project), please make sure you have written PI approval for your travel and attach it to the TA.

- Please make sure you have a **TANGIBLE justification** for your travel. **Simply ‘meeting the dissemination requirements of a project’ is not enough.** Where and why are you going? How does this travel directly benefit and/or relate to the project that is supporting your travel (e.g., presenting data from project)?
  - Please contact your portfolio manager for tangible and concrete justification and speedtype split allocation guidance if you are going to travel across multiple projects in one trip!

**PLEASE PLAN TO SUBMIT YOUR TRAVEL PLANS AS SOON AS YOU KNOW YOU’RE TRAVELING** (and wherever possible, at least 4 weeks in advance).

- All **airfare** must be booked through Concur OR [Christopherson Business Travel](#) (the University’s travel management agency).

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- Christopherson will charge you $20/transaction for the use of a travel agent but this is often worth the cost - we promise!
- Any airfare purchased through an internet site will NOT be reimbursed.
- Airfare needs to comply with the FlyAmerica Act. Please contact your Portfolio Manager if you have any questions around this. See the OCG Decision Guide.
- If you are including any personal travel or traveling from a destination that is not your home you must obtain a comparison quote *up front* from Christopherson. Please consult your Portfolio Manager for the needed comparison quote parameters.

- Once your trip is complete, you will fill out an ICS Travel Reimbursement Form (your portfolio manager will have this).

**Christopherson Business Travel Contact Information**

Email: cutravel@cbtravel.com
Toll Free Phone: 1.855.462.8885
Local Phone: 303.694.8744
USE OF UNIVERSITY AND PERSONAL CARDS DURING TRAVEL

**ALLOWED**

<table>
<thead>
<tr>
<th>Card Type</th>
<th>Allowed Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Travel Card</strong></td>
<td>all travel expenses allowed EXCEPT airfare (e.g., allowed = hotel reservations or other accommodations, meals*, incidentals, ground transportation, parking)</td>
</tr>
<tr>
<td><strong>Personal Card</strong></td>
<td>hotel reservations or other accommodations, meals, incidentals, ground transportation, conference/event registration allowed</td>
</tr>
<tr>
<td><strong>PCard</strong></td>
<td>conference/event registrations allowed (preferred method!)</td>
</tr>
</tbody>
</table>

*preferable to use personal card for meals; ICS recommends per diem reimbursement

**NOT ALLOWED**

<table>
<thead>
<tr>
<th>Card Type</th>
<th>Not Allowed Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Travel Card</strong></td>
<td>purchasing airfare not allowed</td>
</tr>
<tr>
<td><strong>Personal Card</strong></td>
<td>purchasing airfare not allowed</td>
</tr>
<tr>
<td><strong>PCard</strong></td>
<td>anything other than registrations not allowed (meals, incidentals, hotel reservations/other accommodations, ground transportation, etc.)</td>
</tr>
</tbody>
</table>

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MEALS

You will be reimbursed for meals using the per diem rates for wherever you are. We do not need meal receipts for per diem.

In ICS, we prefer that you do NOT use a travel card for your meals so that granting you per diem is easier! Additionally, if you are attending a conference and there are meals provided by the hosts, you cannot be reimbursed for those, regardless of whether you ate them or not.

For group meals/official functions: please contact your portfolio manager. Note that alcohol will not be reimbursed.

FOR BOOKING PURPOSES

Group Travel

Group travel is when one member of a group will be coordinating shared expenses (e.g., registrations, ground transport, meals, etc.). Please contact your portfolio manager for guidance and advice before booking.

Airfare

Book airfare using Christopherson or through Concur. Airfare must comply with the FlyAmerica Act.
- If you are including any personal travel or traveling from a destination that is not your home you must obtain a comparison quote *up front* from Christopherson. Please consult your Portfolio Manager for the needed comparison quote parameters.
- Any airfare purchased through an internet site will NOT be reimbursed.

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**Lodging**

Book your hotel online (i.e., through a particular hotel’s booking system). You can use Concur but you will be required to give personal credit card information to Concur and will be charged immediately.

- **Note:** we do NOT recommend booking lodging through travel sites like hotels.com, booking.com, etc. They generally do NOT provide itemized receipts and non-itemized receipts cannot be reimbursed.
- **For sponsored project travel:** Lodging needs to be booked at the conference/event hotel *or* you can only be reimbursed up to GSA rates if not the conference/event hotel.

MAKE SURE TO GET ITEMIZED RECEIPT including base rates, taxes, etc. It should show your name and proof of payment.

See examples of receipts in Helpful Resources section.

**Ground Transport (Rental cars, rideshares, mileage, etc.)**

If using rental car:

- If booking a rental car online through Concur, your personal credit card will be charged.
- If you rent a car in person (i.e., not using Concur), make sure you rent from one of the preferred agencies (Avis, Budget, National, Enterprise, and Hertz).

**Insurance:** If booking with a Travel Card or through Concur, decline insurance for domestic preferred cars (Avis, Budget, National, Enterprise, and Hertz). The University provides liability coverage. However, accept insurance for international and non-preferred vendors.
MAKE SURE TO GET ITEMIZED RECEIPT for car rental and gas. It should show your name and proof of payment.

If using rideshares (Uber/Lyft/etc.) - YOU CANNOT TIP OVER 20%. Anything tipped over 20% must be reimbursed to the university.

MAKE SURE TO GET ITEMIZED RECEIPT for rideshares. Many will include start and end points, which is great! It should show your name and proof of payment.

(Can you tell this is important? 😊)

If using public transportation, please make sure to keep receipts for any and all public transportation used:
- Shareable bikes, scooters, etc. - please keep receipts!

For mileage reimbursement - please make sure you have start and end addresses for each trip (one-way or round-trip). For each trip, you must have a robust business purpose. Commuting miles (i.e., the miles used between your home and place of work) will be subtracted from the total mileage, and therefore, from your ultimate reimbursement.

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FLOW FOR DOMESTIC TRAVEL

1. **BEFORE traveling**: submit the ICS travel authorization (TA) form ([found here](#)). This will collate the important information for you and your portfolio manager all in one place. In order to minimize back and forth with your PM, please:
   a. Make sure you have a speedtype (ST) or funding source ready.
   b. Make sure your business justification is detailed and robust ([Examples can be found here](#)).
   c. If you are NOT the PI on the grant/project, make sure you have PI approval in writing (email is fine). You will be asked to attach this as a document in the TA.

2. If all is appropriately documented, the TA will be approved in 48-72 business hours.

3. Your portfolio manager will email you the completed and approved TA as well as information on ICS and university travel policies and regulations around reconciliation (access with CU Boulder email address). PLEASE read this carefully to make sure you collect all appropriate documentation during your travel.

4. Enjoy your trip!

FLOW FOR INTERNATIONAL TRAVEL

*International travel* follows similar guidelines as for domestic **BUT travel authorization happens outside of ICS as well. Therefore it can take up to FIVE (5) business days to be approved.** Please take this into consideration when submitting for international travel.

YOU MUST REGISTER YOUR INTERNATIONAL TRAVEL USING **BOTH THE ICS TA AND IN CONCUR**. Your portfolio manager will help you through this process.

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**Export control:** Please check out this page for information on Export Control. You will need to work with the Office of Export Control if you plan to travel internationally with sensitive equipment or information (see here for definitions).

**Emergency, medical, evacuation coverage:** CU provides coverage through GeoBlue. Please use the CU Access Code Number QHG99999UCBT and check out their site for more information.

**Travel assistance and consulting services:** CU provides coverage through International SOS. Flights booked through Concur (should be all your flights!) are uploaded automatically to their system. The CU member number is: 11BCASoooo6.

Please always check the OCG International Travel Page for up-to-date information for access and member codes and other important information.

**COMBINING PERSONAL AND BUSINESS TRAVEL**

- If you are traveling with, e.g., family members, you will most likely need to use Christopherson to book your tickets for proper allocation to university and personal funds (and this will incur $20/transaction).
- If you are adding personal days, it is University policy that you provide a comparison quote. To avoid the risk of non-reimbursement, it is ICS policy that you use Christopherson (cutravel@cbtravel.com) to provide this comparison quote (this is free!).
- Once you return, you will need to provide your portfolio manager with detailed information about which days are personal so they can correctly allocate expenses.

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RETURNING FROM TRAVEL

Upon your return, within **one (1) week**:

a. Email your portfolio manager with the ICS travel reimbursement form, the receipts, and appropriate documentation in ONE email. **Make sure you're accounting for EVERYTHING you'd like reimbursed!** Small items like Uber trips, poster printing, public transportation tickets, parking fees, tolls, mileage, etc. all need documentation and receipts. Take your time to ensure that you are submitting everything you’d like reimbursement for.

b. If you’re claiming per diem, please provide confirmation which, if any, meals were provided by your conference/hosts during your travel (also included in Travel Reimbursement Form).

From submission of receipts to your reimbursement, please expect up to **30 days** for all the paperwork to be submitted, checked, and approved within ICS.

- Please respond in a timely manner to all communications from your portfolio manager around travel reimbursements! We work as diligently as we can to make sure everything is correct so that it can be submitted correctly the *first* time.

**Your timeliness in responding to clarification questions is very appreciated!**

- Please note that there is IRS tax withholding for outstanding charges more than 90 days old!
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Examples of Bad vs Good Itemized Lodging Receipt

This is an example of a BAD receipt: there is NO itemization.

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This double room features air conditioning, tea/coffee maker and bathrobe.

<table>
<thead>
<tr>
<th>Guest name</th>
<th>Edit guest name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max capacity</td>
<td>2 guests max, with a maximum of 2 adults.</td>
</tr>
<tr>
<td></td>
<td>Your total price is based on the rate for the number of booked guests (1 adult). Extra prices may apply for additional guests – up to the max capacity.</td>
</tr>
<tr>
<td>Room size</td>
<td>334 ft²</td>
</tr>
<tr>
<td>Meal Plan</td>
<td>There is no meal option with this room.</td>
</tr>
<tr>
<td>Cancellation policy</td>
<td>You can cancel for free until 1 day before arrival. If you cancel within 1 day of arrival, the cancellation fee will be the cost of the first night. If you don't show up, the no-show fee will be the same as the cancellation fee.</td>
</tr>
<tr>
<td>Cancellation cost</td>
<td>• until 2023 11:59 PM [CDT]: $0</td>
</tr>
<tr>
<td></td>
<td>• from 2023 12:00 AM [CDT]: $196.89</td>
</tr>
</tbody>
</table>

Cancel your booking

Special Requests

I am travelling for business and I may be using a business credit card.

Approximate time of arrival: between 09:00 and 10:00
Early check-in. My flight arrives at 9:15am

Important Information

Guests are required to show a photo ID and credit card upon check-in. Please note that all Special Requests are subject to availability and additional charges may apply.
A damage deposit of USD 100 is required on arrival. This will be collected by credit card. You should be reimbursed within 7 days of check-out. Your deposit will be refunded in full by credit card, subject to an inspection of the property.

Payment

This property accepts the following forms of payment:
American Express, Visa, Euro/Mastercard, Discover, Cash is not accepted

Change credit card details

Booking Conditions
### Cancellation policy
You can cancel for free until 1 day before arrival. If you cancel within 1 day of arrival, the cancellation fee will be the cost of the first night. If you don't show up, the no-show fee will be the same as the cancellation fee.

### Guest parking
Private parking is possible on site (reservation is not needed) and costs $60 per day.

### Internet
WiFi is available in all areas and is free of charge.

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**Need help with your reservation?**

American Airlines

**Contact the property** Phone: +1 312-202-6000

**Manage your booking** You can view your reservation or make changes online any time.

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**Travel with peace of mind**

Find info about traveling safely in our [safety resource center](#).

Find more local emergency phone numbers to help give you complete peace of mind during your stay in USA.

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### The CU Boulder Office of Contracts and Grants Guidelines

requires that we (ICS) "ensure proper documentation exists and is retained to support appropriateness of all sponsored project expenditures. This documentation responsibility is required regardless of dollar amount."

### Receipt

This is an example of a GOOD receipt, with proper itemization.

<table>
<thead>
<tr>
<th>Voucher</th>
<th>Reservation</th>
<th>Main Guest Name</th>
<th>Checkin</th>
<th>Checkout</th>
<th>Room</th>
<th>PAX</th>
</tr>
</thead>
<tbody>
<tr>
<td>3478426522</td>
<td>SY223589</td>
<td>[Redacted]</td>
<td>06.18.2023</td>
<td>06.23.2023</td>
<td>2310</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Item</th>
<th>Quan.</th>
<th>Unit Am</th>
<th>%Tax</th>
<th>Am. w/o tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>06.18.2023</td>
<td>Room Only Meal Plan</td>
<td>1</td>
<td>0.00</td>
<td>12.90</td>
<td>0.00</td>
</tr>
<tr>
<td>06.18.2023</td>
<td>Room</td>
<td>1</td>
<td>175.95</td>
<td>12.90</td>
<td>175.95</td>
</tr>
<tr>
<td>06.18.2023</td>
<td>City tax</td>
<td>1</td>
<td>7.92</td>
<td>0.00</td>
<td>7.92</td>
</tr>
<tr>
<td>06.19.2023</td>
<td>Room Only Meal Plan</td>
<td>1</td>
<td>0.00</td>
<td>12.90</td>
<td>0.00</td>
</tr>
<tr>
<td>06.19.2023</td>
<td>Room</td>
<td>1</td>
<td>175.95</td>
<td>12.90</td>
<td>175.95</td>
</tr>
<tr>
<td>06.19.2023</td>
<td>City tax</td>
<td>1</td>
<td>7.92</td>
<td>0.00</td>
<td>7.92</td>
</tr>
<tr>
<td>06.20.2023</td>
<td>Room Only Meal Plan</td>
<td>1</td>
<td>0.00</td>
<td>12.90</td>
<td>0.00</td>
</tr>
<tr>
<td>06.20.2023</td>
<td>Room</td>
<td>1</td>
<td>175.95</td>
<td>12.90</td>
<td>175.95</td>
</tr>
<tr>
<td>06.20.2023</td>
<td>City tax</td>
<td>1</td>
<td>7.92</td>
<td>0.00</td>
<td>7.92</td>
</tr>
<tr>
<td>06.21.2023</td>
<td>Room Only Meal Plan</td>
<td>1</td>
<td>0.00</td>
<td>12.90</td>
<td>0.00</td>
</tr>
<tr>
<td>06.21.2023</td>
<td>Room</td>
<td>1</td>
<td>175.95</td>
<td>12.90</td>
<td>175.95</td>
</tr>
<tr>
<td>06.21.2023</td>
<td>City tax</td>
<td>1</td>
<td>7.92</td>
<td>0.00</td>
<td>7.92</td>
</tr>
<tr>
<td>06.22.2023</td>
<td>Room Only Meal Plan</td>
<td>1</td>
<td>0.00</td>
<td>12.90</td>
<td>0.00</td>
</tr>
<tr>
<td>06.22.2023</td>
<td>Room</td>
<td>1</td>
<td>175.95</td>
<td>12.90</td>
<td>175.95</td>
</tr>
<tr>
<td>06.22.2023</td>
<td>City tax</td>
<td>1</td>
<td>7.92</td>
<td>0.00</td>
<td>7.92</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>%Tax</th>
<th>Am. w/o tax</th>
<th>Tax Am.</th>
<th>Total:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non VAT Subject</td>
<td>0.00%</td>
<td>39.60</td>
<td>0.00</td>
</tr>
<tr>
<td>County Tax</td>
<td>1.00%</td>
<td>879.76</td>
<td>8.80</td>
</tr>
<tr>
<td>MPEA</td>
<td>2.50%</td>
<td>879.76</td>
<td>21.99</td>
</tr>
<tr>
<td>State Tax</td>
<td>9.40%</td>
<td>879.76</td>
<td>91.50</td>
</tr>
<tr>
<td>Total:</td>
<td></td>
<td>910.56</td>
<td>122.29</td>
</tr>
</tbody>
</table>

This is an example of a GOOD receipt, with proper itemization.
Cost Principles and OCG Travel FAQs

ICS uses the University Cost Principles, based on the US Office of Management and Budget’s Uniform Guidance principles.

Please see here for more information:

Campus Controller’s Office: Charging Travel Expenditures to Sponsored Projects
Cost Principles:
https://www.colorado.edu/controller/policies/cost-principles-policy-statement/charging-travel-expenditures-sponsored-projects

Office of Contracts and Grants: Travel FAQs:
https://www.colorado.edu/ocg/sponsored-projects-travel/travel-faqs