Anthropology Department
Travel Guide & Resources

Contents
CWRU Official Travel Policy ................................................................. 2
Statement of Travel Expense Form .................................................... 2
Departmental Travel Registration Form ............................................ 2
Emergency Medical and Evacuation Insurance .................................. 2
International Travel ........................................................................ 3
  Registering Your Travel Plans ....................................................... 3
  Visas ............................................................................................. 3
  Traveler Health Clinics ................................................................... 3
Center for International Affairs Resources ........................................ 4
Reimbursement FAQs ..................................................................... 4
  Booking and Travel Agencies ....................................................... 4
  Currency Exchange ...................................................................... 5
  Insurance ..................................................................................... 6
Airline/Flight/Luggage Reimbursement ............................................. 6
Automobile/Taxi/Train Reimbursement ............................................. 8
Hotel Reimbursement ..................................................................... 9
Meal Reimbursement ..................................................................... 10
Other .............................................................................................. 10
Tips for keeping track of expenses .................................................. 11
**CWRU Official Travel Policy**

When on official CWRU business travel, faculty, staff, and students are expected to use good judgment and ethical behavior to manage expenses. All personnel traveling or incurring business expenses on behalf of the university are expected to be familiar with the policies.

This guidebook reviews these policies and provides links to forms and other information.

**Statement of Travel Expense Form**

All travel-related reimbursement requests must include a Statement of Travel Expense, so please use this form to record all of your travel expenses. You will still need to provide detailed receipts for each expense. Be sure to include the information regarding dates and purpose of travel. If you are a student, put your student ID where the form requests employee ID.

**Departmental Travel Registration Form**

If you are traveling to a meeting or for any other university-related business and your travel is being supported by the University in any way (including through reimbursement from a university administered external grant), you must fill out the registration form prior to your travel and submit it to the Department Chair.

**Emergency Medical and Evacuation Insurance**

CWRU’s Office of Risk Management provides medical and evacuation insurance and assistance traveling on university-related business abroad, as well as to students traveling internationally as part of their educational experience.

To obtain an insurance identification card, please email the Office of Risk Management and Insurance and provide your dates of travel, the destination and the purpose of your trip. In order to access these services, travelers will need an insurance identification card prior to their travel.
Contact Info

Requests for Travel ID insurance cards should be sent to: Dina Leinweber at dina.leinweber@case.edu. Questions can be directed to Dina at 216-368-1547 or Laura Corrigan at laura.corrigan@case.edu / 216-368-4394.

International Travel

Registering Your Travel Plans

Faculty and staff planning international travel should visit the International Travel Registration page of the Center for International Affairs to register their international travel itineraries. Travelers should review destination-specific health information from the Center for Disease Control, as well as travel advisories issued by the U.S. Department of State.

Students considering CWRU-related international travel should review Students Traveling Abroad for applicable policies and procedures. This applies to students doing independent research projects.

Visas

CIBT is CWRU’s preferred vendor for visa processing for foreign travel. If you wish to use a visa service, you can use this link to access a variety of their services at a discount.

Traveler Health Clinics

Cleveland Clinic and University Hospitals provide comprehensive consultation for the preparation and treatment of international travelers. The centers provide a comprehensive travel consultation prior to departure and expert diagnosis and treatment for those who return ill.

International Traveler Health Clinics – Cleveland Clinic main campus and Beachwood

Roe Green Center for Travel Medicine – University Hospitals main campus and Chagrin Highlands
**Center for International Affairs Resources**

**Benefits of Registering International Travel**

**International Travel Registration for Faculty & Staff**

**International Travel Resources**

**Students Traveling Abroad**

All CWRU students traveling internationally need to follow specific requirements related to safety and each type of program will have slightly different requirements, all contained at the above link. Any student traveling abroad can also make an advising appointment through the Office of Education Abroad so that they can fully support your experience.

**Education Abroad: Preparing to Go Abroad**

**Education Abroad: While Abroad**

**Education Abroad: Returning to CWRU**

**Reimbursement FAQs**

For a complete list of Travel FAQs, [click here](#).

**Booking and Travel Agencies**

Why use a preferred travel agency?

University agencies provide improved audit integrity, direct billing, and cost savings in many situations. With Direct Travel or Flight II, CWRU users can get free name changes on unused tickets when purchased from United Airlines. The agencies also provide a 2-16% cost savings for each United airfare depending on airfare class and destination. United discounts are also available for employee leisure travel when booked through the agencies.
In some cases, Direct Travel discounts will be higher than the CWRU discount program for that flight and market because of Direct Travel volume discounts with United Airlines. American Airlines discounts are also available from Direct Travel.

Can I use Orbitz, Hotwire, Priceline or Travelocity to book business travel?

Using these services is discouraged and may delay reimbursement or make reimbursement impossible. They rarely provide the detail and clarity needed, per policy, when purchasing packaged travel.

Are reservation documentation or itineraries proof for reimbursement?

Travelers need payment documentation, such as a receipt, with the last four digits of a credit card visible. Credit card statements may be submitted with itineraries to support expenses.

When using an online service such as Orbitz, Priceline, or Expedia, for hotel or travel packages, be sure payment method is indicated or provide a credit card statement.

Currency Exchange

How do I get reimbursed when I’ve paid in foreign currency?

University policy requires writing dollar equivalents onto all receipts. Not doing so can slow reimbursement. The Travel and Expense Module automatically provides travelers daily foreign exchange rates for most major global currencies for days traveled from the university’s contracted-provider XE.com. Be preemptive by using a credit card to track expenses paid in foreign currencies. Cards for U.S. residents report transaction information in U.S. dollars. Statement-supported U.S. dollar amounts can then be requested for foreign currency expenses. Be sure to supply all necessary detailed receipts along with your credit card statement when submitting for reimbursement. When exchanging cash, submit the bank or exchange kiosk receipt.
I paid in multiple foreign currencies. How do I get reimbursed?

A credit card statement is best for reimbursements in a foreign currency. Statements list the exact amount to be reimbursed. Lacking a credit card statement, use the built-in currency conversion tool in the PeopleSoft Travel and Expense Module. FOREX rates can also be manually entered as a last resort, but requires supporting documentation and is subject to audit by the Travel Manager.

**Insurance**

Do I need flight insurance for my international or domestic trip?

No. University travel policy prohibits reimbursement for this. Instead, CWRU reimburses fees for ticket change and reuse when an approved need for cancellation exists.

Do I need rental car insurance?

The University’s rental car insurance card covers employees and students on University business. Be sure to rent it in the name of “Case Western Reserve University, by Your Name.” When renting for personal or professional reasons consider the discounted rates from [CWRU preferred car rental agencies](#).

Does the University reimburse travelers for rental car roadside assistance?

No. Insurance of any kind is not reimbursable for domestic and U.S. to Canada car rentals.

**Airline/Flight/Luggage Reimbursement**

Are U.S. airlines required, even if another carrier is cheaper?

Anyone with a federal grant is restricted by the Fly America Act and must use a U.S. air carrier. Travel is permitted on foreign carriers when they codeshare with a U.S. airline. For additional and more specific information, see the [Fly America Act](#).
Are Global Entry and TSA Pre fees reimbursable expenses?

These expense types are not supported, by policy, for reimbursement.

CWRU allows me to retain frequent flier miles and hotel points. Can I accept these or other gratuities when travel planning?

CWRU policy allows enrollment in these programs and point collection. CWRU policy forbids event planners to receive miles/points or other gratuities beyond a “social gesture.” For example, an overnight hotel stay would be unacceptable under this provision. See Section 10 of the CWRU Procurement Policy for details.

Can I use my own airline reward miles for seating/cabin upgrades?

Yes, if you pay any associated costs. Upgrades to business class must meet policy requirements and receive Chief Financial Officer approval prior to ticketing if there is any expense to the University.

Can I be reimbursed for using personal frequent flier miles on CWRU business?

No.

I have enough money in my budget and flying more than five hours. Do I need Chief Financial Officer approval to purchase upgraded seating?

Yes.

Does the University reimburse travelers for airline fees such as extra legroom, exit row seating and early boarding?

Departments/schools have discretion when approving economy-class cabin ancillary fee reimbursements.

Can I be reimbursed for inflight food?

Departments/schools have the discretion to approve fees for food.

Can I be reimbursed for inflight Internet data service?

Yes, if the purchase is for university business and is approved by your department. Inflight entertainment services such as Audio and Video on Demand are never reimbursable.
Are upgrades to “premium” economy seating reimbursable?

No. Fares must be purchased at the lowest price available on the most direct route. Upgrades within a domestic economy-class (coach) cabin are the decision of the individual school/department. Travelers should know charges are added per segment.

Can I receive airfare reimbursement before my actual travel date?

Yes, with the appropriate receipts showing actual payment.

Will CWRU purchase personal luggage or reimburse for luggage damage?

No. Purchasing luggage is the traveler’s responsibility. The traveler is also responsible for damage to personal luggage while on university business. If the airline, hotel, or TSA have damaged your suitcase, seek compensation from them.

Are airline baggage fees reimbursable?

Yes. Travelers must submit explanations for fees beyond standard amounts of personal baggage.

Do I need a checked bag receipt for each portion of a round-trip flight?

Yes. Submit individual bag receipts for all legs, both outbound and return trips.

Automobile/Taxi/Train Reimbursement

Do I need receipts for highway toll reimbursements? Can I be reimbursed for using my personal E-Z Pass?

Yes. Toll reimbursement is receipt-based. Travelers are also welcome to submit their E-Z Pass statements. Include your E-Z Pass statement and note trip charges associated with CWRU business.

How do I get reimbursed personal vehicle mileage?

Specific origin and destination addresses are required. A general statement of “Cleveland” to “Columbus” is not specific enough. A Google Maps reference will work.
Do I need taxi receipts to receive reimbursement?

Yes.

Is train travel reimbursable?

Yes. Include a receipt with form of payment – cash, check, credit card – clearly indicated. As with airlines, the lowest available coach-class fare is covered.

Hotel Reimbursement

Is laundry and/or dry cleaning a reimbursable traveling expense?

Yes, under certain circumstances and length of trip.

Can I be reimbursed for toiletries while traveling?

No.

Can I be reimbursed for hotel health club charges?

No.

My hotel meals are included on my folio. Is this adequate for reimbursement?

No. Meals above allowance amounts ($10-breakfast, $12-lunch, $26-dinner) must have detailed receipts. Those without detail are subject to reduction to permitted allowance maximums.

What about shared-economy lodging such as Airbnb?

There are significant questions about traveler safety when considering shared-economy lodging properties. Commercial hotel and lodging properties change room security codes on a traveler-by-traveler basis. Homes and apartments offered by services such as Airbnb typically do not. Emergency evacuation and entry/egress standards are stringent for commercial lodging properties. Residences offered by shared economy providers are zoned to a different, non-commercial standard and may put travelers at risk in the event of medical emergencies or evacuations. As such, travelers should be prudent when considering business travel accommodations.
Meal Reimbursement

Is a credit card receipt enough for meal reimbursement?

All meals with food, tax, and tip totals above the University meal allowance require a detailed receipt specifying items purchased. Detailed meal receipts are readily available from most restaurants. Reimbursement for group meals must include names of attendees and the nature of University business discussed.

Can I add tips to the CWRU meal allowance?

No. The maximum allowance amounts ($10-breakfast, $12-lunch, $26-dinner) include a tipping allowance.

Other

What if it’s difficult to obtain receipts in remote international destinations?

If you believe furnishing receipts for small, trip-related expenses will be difficult, buy a receipt book before you go. You may still use the University meal allowance (up to $48 per day for actual breakfast, lunch, and dinner expenses) and claim intra-urban public transportation expenses without furnishing receipts.

Can I prepay hotel or rental car charges if that saves money?

Yes. However, reimbursement is made only after the stay. A detailed hotel or car rental receipt is required.

Does CWRU support ATM fees for cash withdrawals?

Not in the United States.

What is the best way to pay for conference registrations?

Personal credit cards can be used.
**Tips for keeping track of expenses**

In order to insure swift and trouble-free processing of your receipts upon return, we recommend keeping a daily log of expenditures and receipts. Sometimes it is useful to number/date receipts and note something about it on the receipt itself in case it gets separated from the log (e.g., “lunch at roadside stand, 2\textsuperscript{nd} May 2022”). If possible, take a picture of receipts and keep the physical copy in a well-marked envelope or folder. Keeping a spreadsheet to track how much you are spending by category will also expedite submission of receipts upon return.

Receipts should include detail of the purchase to the extent possible. Please see above for what is allowed to be reimbursed without receipts. Try to get receipts whenever you can, but we know it is not always possible. In those cases, keep track of your expenditures and we will work with you to get these reimbursed when you return. You can buy a book of blank receipts at most office supply stores or create one yourself to use to create receipts as necessary. For example, we sometimes use these to ask meeting attendees to sign for receipt of an honorarium.

If you are traveling internationally and exchange money to local currency, keep the receipt from the FOREX to establish the exchange rate for your reimbursement. Before submitting the receipts, write the exchange rate on the receipt. If you use a credit card, the company will provide that exchange rate.

NB: You do not have to wait until you return from your trip to submit your request for reimbursement. Especially if you are going for extended fieldwork, you may wish to submit receipts at intervals. All materials can be submitted electronically, as long as they include all the necessary information and the travel expense form.

**Bon voyage!**