

TRAVEL & PROFESSIONAL TRAINING POLICIES AND REIMBURSEMENT GUIDELINES

The following policies and guidelines have been developed to meet federal requirements for financial oversight of government-funded programs and to comply as closely as possible with both AFPI and government travel procedures.

GENERAL POLICY

AFPI will reimburse Science & Technology Policy Fellows for the actual expenses of **pre-approved** travel and training that are reasonable and necessary for the conduct of fellowship-related business. Caution and good judgment should be exercised by travelers when incurring business expenses. Fellows are expected to use reasonably economical lodging, meals and transportation that will meet their requirements, with due consideration to safety, comfort, and scheduling.

AFPI will not reimburse any expenses that exceed the original travel/training allocation of the fellowship unless the host office provides additional funds via a change to the funding instrument. A fully processed funding modification is required before the start of any fellowship-related travel or training that will exceed the amount of funding available (*written or verbal approval is insufficient; documentation of the fund transfer is required*). **The addition of travel/training funds to a fellow's account must be initiated and processed by the fellowship host office.** All reimbursements are subject to final approval from the AAAS grants department.

REIMBURSEMENT DEADLINES Expense submission deadline post travel/training	No later than 30 days from conclusion of the travel/training event.
End of Fellowship Year expense submission	By September 30 th -no exceptions.
Early Departure from fellowship	By 30 calendar days from the end of the fellowship.

Expense reports should be filed through Fyle for all travel and training – no exceptions. **Expense reports with all required documentation must be filed no later than 30 days from the conclusion of the trip/training activity, OR within 30 days following the end of the fellowship, whichever is sooner.** AFPI cannot reimburse for any expenses incurred beyond the end date of the fellowship. Fellows will be required to take financial responsibility for any fellowship-related expenses that are not submitted for reimbursement with all required documentation by the 30th calendar day following the end of each fellowship year (September 30th). ****There will be no exception for reimbursement requests received after September 30th. ****

Fellows who extend for a shorter period or who depart the fellowship early for any reason must submit for reimbursement with all required documentation by the 30th calendar day following the date their fellowship terminated. **There will be no exception for reimbursement requests received more than 30 days after the fellowship termination date.**

*****Reimbursements of any type take up to 30 business days to process. *****

No travel/training will be approved for the final two weeks of the fellowship. Should a fellow resign their fellowship after approval is received, that approval may be revoked. Renewing Fellows seeking travel/training or career Coaching approvals in advance of the upcoming fellowship year are not permitted to submit travel/training or career coaching requests prior to August 15th. No funds should

be expended without prior written approval from STPF Finance, and no funds are permitted to be expended prior to August 15th.

BEFORE YOU PAY FOR TRAINING OR BOOK TRAVEL:

Fellows may not purchase or commit funds for fellowship-related travel and/or training without prior written authorization from the fellow's host office point of contact (POC) and AFPI. You will need to log into FellowsCentral to access the *Stipend Expenditure Requests under My Financials* to complete your request(s). We will not provide approvals for travel/training requests that arrive via email.

The agency approval is through the system and will trigger AFPI to provide subsequent approval. *Approvals may take AFPI up to 48 business hours from the time we receive approval from the offices. The authorization **must** be received, and approved, by AFPI before incurring any expense or booking any travel or training activity. Failure to follow this stipulation will result in the fellow bearing the burden for costs not approved.*

Career Coaching Request and Approvals

Career coaching services are now being offered as part of the fellowship professional development program. Requests for career coaching are handled through FellowsCentral, under the travel/training request portal.

Procedures are similar to traditional travel/training requests, with the addition of a few additional steps. Below are the procedures for submitting a Career Coaching travel/training request:

- ☐ Only the vendors listed on FellowsCentral are approved to provide professional coaching services for AFPI fellows using their travel/training funds.
- ☐ **Required Documentation:** A completed Statement of Work (SOW) signed by both the fellow and the coach must be submitted to the STPF Finance through the Travel/Training Request Portal on FellowsCentral and attached to the *Stipend Expenditure Request*.

Travel Advances

- Each advance is limited to \$5,000 and you may only have one advance at a time.
- Travel advance amounts must be round numbers (i.e., \$15 and NOT \$15.16).
- Your advance requested amount is subject to be reduced based on the discretion of the CFO.
- **If you request an advance for multiple trips, the request should be made on one form, and you will receive one lump sum payment for the requested trips.**
- **When the travel advance includes multiple travel/training requests, the travel advancement request must specify the amount sought for each specific trip.**
- The form must be attached to an advance request through Fyle. www.Fylehq.com.
- All travel advance requests must include your travel approval and supporting documentation.
- **No subsequent advance will be granted until your previous advance is reconciled with the AAAS Finance office.**

Please allow up to 15 working days to process the advance and for the direct deposit to be received. To learn more about advance reconciliation please contact STPF finance by submitting a [support ticket](#).

No reimbursements for other travel/training requests will be made until the outstanding advance is cleared (all documentation submitted, repayment made to AAAS, if applicable, and approved by AAAS). **

PLANNING YOUR TRAINING/TRAVEL:

Fellowship-related travel and training should be planned as far in advance as possible to ensure timely authorization. Upon authorization, fellows may use the AAAS-designated travel agency (**Concur**) to make flight arrangements, or you can use the Internet and make the arrangements yourself. When making a purchase, including using Concur, be sure to print the itemized receipt for the item purchased, and be certain that it shows date and method of payment.

There is no lodging allowed in the Washington, D.C. metropolitan area (50-mile radius from your home address).

Documentation required for reimbursement must include:

Conference/Event Registrations:

- ☐ Name of attendee
- ☐ Name of conference
- ☐ Amount paid and list of items purchased (e.g., registration, meals, pre-conference workshop)
- ☐ Dates
- ☐ Proof of payment (bank or credit card statement, receipt, or front and back copy of cancelled check)

Other miscellaneous non-travel purchases:

- ☐ Name and address of vendor
- ☐ Name of purchaser
- ☐ Date purchased
- ☐ Itemization
- ☐ Amount paid
- ☐ Proof of payment (bank or credit card statement, receipt, or front and back of cancelled check)

Please consider this list when making purchases related to training/travel (This list is illustrative but not exhaustive; it is intended to help provide clarification.)

Allowable Ancillary Travel Expenses	Non-reimbursable Expenses
Cost of obtaining travelers' checks or foreign currency	Alcohol (plus the associated taxes and tip)
Laundry/dry cleaning while on business travel – only if travel extends beyond 8 days. You must provide an itemized receipt	Books and other reference materials (unless required by an approved course, workshop, or trip)
Laundry/dry cleaning while on business travel – only if travel extends beyond 8 days. You must provide an itemized receipt	Software (unless required for an approved course or workshop)
International calls – will reimburse for any one of the following: an international calling card, international SIM card, or international cellular provider data/voice/text plan, up to \$10/day	Personal amusement, recreation, or entertainment
Internet access/use of computers, facsimile or scanning charges, and mailing/shipping expenses for fellowship-related activities while on travel	Theft or loss of personal property and money while traveling
Immunizations and certain required medications (e.g., malaria pills) – detailed receipt of services provided is required along with a receipt of payment	Sightseeing tours

Visas (necessary for global travel)	Medication and other personal care items not required for international travel
Passports – only in cases when the fellow does not already hold a passport and is required to travel internationally for fellowship-related business	Haircut, manicure, shoeshine
Global entry-only the one-time application fee (expedited fees, travel to interview, etc. are not reimbursable) and may ONLY be requested and reimbursed within an international travel request	Use of gym, sauna, steam bath, massage, and similar facilities
	Hotel and in-flight movies
	Airline lounge access
	Rental or purchase of clothing items or other equipment
	Personal travel insurance or other insurance not supplied by AFPI
	Traffic violations/parking tickets
	Childcare
	Boarding of animals
	Lost or stolen travel advances
	Costs incurred by spouse or personal guests
	Laundered garments not related to professional use
	Professional coaching services
	Add-on Fees such cleaning fees for home share services like Airbnb, HomeAway, VRBO, FlipKey
	Add-on Fees such as preferred seating or carry-on luggage fees are not reimbursable
	Conveniences such as seat upgrades.

ONCE TRAINING AND TRAVEL IS COMPLETE:

Reimbursement is limited to authorized fellowship-related expenses, such as expenses incurred by the Fellow in performance of authorized fellowship duties, including travel and training activities (e.g., conferences, courses, workshops) Only expenses that the host office deems to be fellowship-related *and that receive approval from AFPI* will be considered for reimbursement. (see allowable costs section below). To be reimbursed for an expense, the fellow must:

- ☐ Provide documentation of advance authorization for the travel/training.
- ☐ Submit an expense report detailing the costs and proof of payment.
- ☐ Provide additional documentation as outlined below.
- ☐ Must account for *all* expenses on one expense report (one submission per trip/event). If you do not claim all expenses on this submission, you have forfeited the reimbursements. ****No addendum or additional expense submissions will be accepted. ****
- ☐ The travel/training must be completed before reimbursement is requested and made.

To avoid delays in processing expense reports, fellows **must** follow these protocols:

- ☐ Expense reports must be submitted thorough Fyle at www.Fylehq.com.
 - ☐ You must provide a currency converter when you submit your expense report.
 - ☐ Acceptable documentation includes ATM/currency exchange receipt and/or an on-line
 - ☐ exchange rate for the travel date in question.
- Double-check totals.

All expenses must be fully explained and supported by **original itemized receipts** which includes:

- ☐ Receipts for all purchases, **excluding meals which will be reimbursed at the M&IE rate listed on gsa.gov or State.gov.**
 - ☐ Proof of payment, as evidenced by cash receipt, credit card billing statement, or copy of cancelled check. (Your receipt must show Who the vendor is, What you are paying for, The date of payment, and the Method of payment.)
 - ☐ Explanation for unusual items or costs that may not be self-explanatory.
- If original receipts are not available, fax or photocopies may be acceptable; however, an explanation for the missing receipts must be provided. AAAS may decline to accept non- original receipt documentation.

If an original receipt is unusual or not self-explanatory, the traveler must provide a brief note of explanation and details of the expense. If original receipts cannot be obtained (acceptable only in rare cases) the fellow must provide an itemized list of expenses with the reimbursement form.

NO RECEIPTS SHOULD REFLECT ALCOHOL OR ALCOHOL RELATED CHARGES

Air	Detailed travel invoice showing all stops between the DMV and your destination.
Automobile	Car rental (receipts for car rental and gasoline, parking, and tolls); Personal automobile (Google Maps or equivalent directions to/from destination, with total mileage displayed for personal automobile mileage; receipts for parking
Rail/Bus	Detailed receipt
Taxi/Shuttle	Taxi/ Rideshare/ shuttle receipt.
Comparable Documentation	Go to www. Kayak.com and search 2 items: 1.) Flight/Train results for business dates only (dates of travel if no personal travel was involved), 2.)Secondary search of flight/train destination back to DMV from wherever your personal destination will be. Search results must show all available flights and trains on all carriers .Please limit search to 3 pages.

Lodging	Hotel checkout receipt or an on-line broker receipt (such as Orbitz or Travelocity) showing proof of payment and/or an effective balance of zero.
Meal and Incidental Expenses (M&IE)	M&IE rates are available in state dept or GSA websites by selecting the location.

By Air

Fellows should attempt to purchase tickets at least 14 days in advance to take advantage of discount/advance purchase fares (unless extenuating circumstances do not allow the advance purchase). *Only U.S.-based, economy class*, commercial airline flights are reimbursable.* Some airlines added Basic Economy class flights in which you do not get to select your seats, cannot have a carry on, and flight changes and refunds are not allowed etc. **For those reasons, this class of airfare is not advisable, please select regular economy class tickets.** If there is no U.S. carrier option available, prior written AFPI approval is necessary for an FAA exemption. Non-US carriers that share flight codes with US airlines may be permissible but *must be booked through the U.S. carrier side of the code share.* You need documentation showing this permissible code share to be compliant with the FAA. Please do not rely on advice from the Concur travel agent about FAA compliance, as they do not understand how it pertains to AFPI policy. Violation of compliance will result in personal financial liability. If you are unsure about compliance, **contact us at by submitting a support ticket via [Freshdesk](#) for questions, clarification, or concerns prior to booking your ticket.** ****Do not contact the staff directly. ALL support questions must be submitted via a help desk ticket on FreshDesk.****

Selection of air carrier and/or flight times are not to be decided based on frequent flyer mileage or other travel awards unless the rate is consistent with the lowest quoted fare. Using alternative airports in large cities, such as BWI or Dulles in the Washington, D.C. area, may result in substantially lower ticket prices, even after the cost of shuttle service or taxi fare is taken into consideration.

A fellow may elect to arrive one day earlier than the start of the conference/training. The Fellow may elect to stay beyond the approved conference/training at his/her business destination; however, all additional non-business days are to be considered personal travel and are not reimbursable. Likewise, **you must have approval to take personal days away from your host office; the approval for personal travel must be included in your request for travel. For trips with personal travel extending beyond approved travel dates or travel where the departure or return location is somewhere other than the greater Washington, DC area you must have comparable documentation.** Other related expenses (hotel, food, etc.) for travel on personal days are not reimbursable.

* Business-class airfare *may* in some rare cases be permissible, but only when less costly arrangements: (1) are not available at the time reservations are made or reasonably should have been made; (2) **would require difficult or circuitous routing;** (3) would result in significant discomfort or hardship to the traveler because of his/her physical or medical requirements; (4) would result in additional direct costs which would offset the savings in coach class transportation costs; (5) **would greatly increase the duration of the trip;** or (6) would require travel to begin or end at unreasonable hours. ***All such requests must be approved in advance by both the fellow's supervisor (in writing via email) and the AAAS Department Head.*** The approval process may take 5-7 business days so plan ahead.

By Automobile

Personal automobile transportation will be reimbursed at the rate authorized in IRS regulations (mileage reimbursement cannot exceed the cost of economy airfare plus bus or shuttle transportation to and from airports). ****Tolls are reimbursable. ****

Car rentals may be undertaken *only* when other transportation is unavailable or impractical. AAAS will reimburse for the cost of the rental, basic insurance, gasoline, parking, and tolls, according to actual expenditures. Rental reimbursement is limited to economy or mid-size rates unless business requirements justify a larger, more costly vehicle. A business justification for car rentals must be provided in the travel approval request prior to renting the car. Without this approval, car rentals and associated costs will not be reimbursed. Written advance approval from the fellow's host office POC must be provided along with written justification on your Fyle expense report submission. Whenever possible, rental reservations should be made through the AAAS-designated travel agent (Concur) to take advantage of negotiated rates, when available.

By Rail or Bus

Rail and bus travel must be economy/coach class, unless other arrangements are necessary for physical disability (requires prior approval from STPF), or if the cost of the higher-level class is justified by meeting time restrictions and/or allows the fellow to avoid staying overnight and incurring hotel and meal charges that would exceed the cost of the economy class travel plus those additional expenses (requires prior approval from STPF).

By Taxi/Shuttle

Taxis, Rideshares (Uber/Lyft) and shuttles may be used for transport to/from the airport and to destinations related to fellowship activities when mass transit is not available or feasible (e.g., very early or late arrivals/departures, inefficient multiple connections, delays due to schedules, carrying excess luggage and/or equipment, or unsafe areas). All travel must be via economy class, therefore charges such as limousine service typically will not be reimbursed. For Uber, Lyft or similar companies only regular economy class fare will be reimbursed (i.e., UberX and UberPool only, not UberBlack or UberXL) and no surge pricing will be reimbursed. However, limo service may be reimbursed with documentation that it was less than or equal to the cost of a taxi or shuttle to the same destination. If there are unusual circumstances that require use of non-economy transportation, the fellow must provide a detailed rationale on the reimbursement request. *AFPI reserves the right to decline reimbursement for non-economy travel.*

Comparable Documentation

If you are adding personal travel, OR if your departure and return location will be different than the greater Washington, DC area (The DMV), you are required to have comparable documentation, as well as approval from your Mentor.

You will need to attach comparable documentation from (www.kayak.com) to your travel approval request. The flight comparable must reflect all available flights on all available carriers, spanning the official travel window. The document must reflect costs of multiple flights/train fares (3 or more) for work related travel and locations since the actual flight/ train fares being booked will include personal travel and/or have different departure/return locations. If the cost of the actual flight booked exceeds the lowest price in the comparable document the fellow will be responsible for the difference.

Lodging

GSA Per diem lodging rates for *single room occupancy* should be used as a guide. Lodging will only be reimbursed for the expense incurred. Lodging per diem rates *do not include taxes.* (However, you are allowed reimbursement for hotel taxes and fees)

Meal and Incidental Expenses (M&IE):

Meals are reimbursed at the local per diem rate, according to [GSA](#) for US travel or [US Department of State](#) for international travel. **No specific meal receipts are required.** You must select the location you are travelling to and Certify will calculate your per diem.

HELPFUL HINTS

To ensure a smooth and quick reimbursement process, follow these tips and detailed instructions below:

- ☐ Ensure that the expense report is accurate and reflects the correct event name, dates, and expense categories.
- ☐ Attach the Concur invoice which shows airfare cost and booking fee. (the actual receipt from Concur with the final price, not the basic email itinerary)
- ☐ Receipts must be original and itemized
- ☐ If claiming mileage, print out a Google map showing start and end points, along with the total mileage.
- ☐ Use provided checklists for better organization.
- ☐

Frequently Used Websites and Instructions

System	Purpose	Link
Advances	Frequently Asked Questions	Advances FAQs : AAAS S&T Policy Fellowships (freshdesk.com)
Career Coaching	How to Request Approval	Career Coaching - How to Request Approval : AAAS S&T Policy Fellowships (freshdesk.com)
Career Coaching	Statement of Work and Instructions	Career Coaching - Statement of Work (SOW) and Instructions : AAAS S&T Policy Fellowships (freshdesk.com)
Fyle	Travel/Training Reimbursement	https://app.fylehq.com/app/accounts/#/signi
<ul style="list-style-type: none">Fyle	How to submit to STPF guide	_____ _____ _____
<ul style="list-style-type: none">Fyle	How to submit an expense report - Certify tutorial	_____ _____ _____
Concur	AAAS paid Travel site	https://www.concursolutions.com/
<ul style="list-style-type: none">Concur	Instructions and Billing Codes	Concur-Booking Travel : AAAS S&T Policy Fellowships (freshdesk.com)
Freshdesk	General Travel/training Information and Links - Searchable	AFPI Finance, Travel, and Training Information : AAAS S&T Policy Fellowships (freshdesk.com)
Travel/Training	How to Submit Requests	How to submit a Travel/ Training Approval Request : AAAS S&T Policy Fellowships (freshdesk.com)
Travel/Training Policy	Also available on your HR site	Travel & Training Policies and Guidelines _____ _____

For more information contact the STPF Finance staff:
202.326.6700 or by submitting a support ticket via [Freshdesk](#)