

Title: CHAVI-ID TRAVEL

Approval

CHAVI-ID (Center for HIV/AIDS Vaccine Immunology and Immunogen Discovery) Operating Policies are approved by the CHAVI-ID Scientific Leadership Group (SLG) or the CHAVI-ID Program Director.

Policy Statement

Travel, both foreign and domestic, is allowable as a direct cost on the CHAVI-ID when such travel will provide a direct benefit to the project. As a Center funded by federal funds, the CHAVI-ID must comply with the NIH policies governing domestic and international travel as described in the NIH Grants Policy Statement. A copy of this policy is located at

http://grants.nih.gov/grants/policy/nihgps_2003/index.htm

and is incorporated by reference in its entirety. This document is intended to provide additional guidance and clarification to the Grants Policy Statement.

Definitions

Domestic vs. Foreign travel

Domestic travel is travel performed within the recipient's own country. For U.S. and Canadian recipients, it includes travel within and between any of the 50 States of the United States and its possessions and territories and travel between the United States and Canada and within Canada.

Foreign travel is defined as any travel outside of Canada and the United States and its territories and possessions. However, for an organization located outside Canada and the United States and its territories and possessions, foreign travel means travel outside that country.

In all cases, travel costs are limited to those allowed by formal organizational policy and, in the case of air travel, the lowest reasonable commercial airfares must be used. For-profit grantees' allowable travel costs may not exceed those established by the FTR, issued by GSA, including the maximum per diem and subsistence rates prescribed in those regulations. This information is available at <http://www.gsa.gov>. If a recipient organization has no formal travel policy, those regulations will be used to determine the amount that may be charged for travel costs.

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U.S. Federal Travel Regulation (FTR)

The FTR is the regulation contained in 41 Code of Federal Regulations (CFR), Chapters 300 through 304, which implements statutory requirements and Executive branch policies for travel by Federal civilian employees and others authorized to travel at government expense.

GSA

U.S. General Services Administration

Scientific Leadership Group (SLG)

The scientific governing body for the CHAVI-ID network

Policy

A. CHAVI-ID Domestic Travel Requirements

The travel performed is an allowable expense to the CHAVI-ID if the following conditions are met:

- The travel has been arranged using American Express Business Travel and will be paid for from Central CHAVI-ID funds.
- The travel provides a direct benefit to the CHAVI-ID project.
- The travel requested either is listed on the CHAVI-ID SLG Approved Travel Budget for the current year or has subsequently been approved by the CHAVI-ID Publications Committee.
- The travel expenditures are allowable under NIH policy.
- Domestic travel expenses may be paid from a subcontract as long as the subcontract has an approved travel budget for the current year including local travel funds (for mileage and/or accommodations for patient visits, local specimen transport, etc.) and is invoiced as part of the monthly invoice to Duke.

B. CHAVI-ID Foreign (out of home country) Travel Requirements

All recipients of CHAVI-ID funds must comply with the requirement that U.S. flag air carriers be used when commercial air transportation is the means of travel between the United States and a foreign country or between foreign countries. This requirement must not be influenced by factors of cost, convenience or personal travel preference. The cost of travel under a ticket issued is allowable if the purchase is in accordance with GSA regulations for us using U.S. flag air carriers and code share partners. It is required that the U.S. flag carrier code share flight number be listed on the ticket addition to the foreign carrier flight number for it to be a 'code share flight'. An existing code share agreements does not in itself satisfy this requirement.

http://www.gsa.gov/Portal/gsa/ep/contentView.do?contentType=GSA_BASIC&contentId=20107&noc=T

(A code-sharing agreement is an arrangement between a U.S. flag carrier and foreign air carrier in which the U.S. flag carrier provides passenger service on the foreign air carrier's regularly scheduled commercial flights.) Please contact CHAVI-ID management with any questions prior to travel.

Because of the complexity of the NIH foreign travel requirements, **all commercial air travel must be arranged by American Express Business Travel**, either online via AXIOM®, the online travel booking tool from American Express, or by calling. AMEX is familiar with CHAVI-ID / NIH travel guidelines and will ensure that the travel is compliant with NIH foreign travel policies. Centralized travel funds approved for your CHAVI-ID subcontract will be used as direct payment to AMEX.

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How to make travel arrangements:

Book travel online using AXIOM® at <https://dhvitavel.axo20.com> or call 1-888-477-0451 to make a reservation. When calling in, please make sure to reference you are with the Duke Human Vaccine Institute. Prior to arranging any travel, you will need to create a user profile. Instructions are below.

Reservations: 8:00am-9:00pm ET

Email: executivetravel@trvlnk.com

Phone: 1-888-477-0451

Website: <https://dhvitavel.axo20.com>

To begin, you need to register by following these easy steps:

1. Enter this URL into your Web browser: <https://dhvitavel.axo20.com>
2. Click on “**Create a new account**”. Follow the prompts which will instruct you to enter your name, email address and **Security Code**. You will then be asked to create a user name and password that you will use to initially access the site.
3. NOTE the **Security Code is 354319** and is critical to site access and should not be shared.
4. After supplying this information, you will receive an email from American Express Business Travel **within 24 hours** that will include instructions on how to complete your registration
5. Once the follow up email from American Express has been received, you will be able to into the tool and complete your profile. Follow the prompts and enter your profile information including contacts, preferences, etc. By entering your profile information you will save time on each booking.
6. Please review and update each section. It is very important to complete this profile in as much detail as possible, as this will ensure that all travel preferences and requirements will be incorporated into the reservation process.
7. Upon completion of your travel preferences, you will be redirected to the AXIOM® Home Page. Click on the “**Profile**” link on the upper right corner of the navigation bar. Click on each link to complete your profile. Make certain to add your credit card payment information and additional preferences as desired to help ensure your information is as complete and as accurate as possible.
8. Press “**Save**” to store your information.

C. Frequently Asked Questions

1. What is U.S. Flag Carrier Service?

U.S. flag air carrier service is a service provided on an air carrier which holds a certificate under 49 U.S.C. 41102 and which service is authorized either by the carrier’s certificate or by exemption or regulation.

U.S. flag air carrier service also includes service provided under a code share agreement with foreign air carrier in accordance with Title 14, Code of Federal Regulations when the ticket, or documentation for an electronic ticket, identifies the U.S. flag air carrier’s designator code and flight number. American Express Business Travel will ensure compliance with the Fly America Act by booking travel on US carriers or code-shared flights or by documenting allowable exceptions when using a Non code-shared flight.

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2. What are allowable travel-related costs?

Travel costs of the employees working on a CHAVI-ID -supported project may include associated hotel, registration, food/sustenance allowances, and other travel-related expenses such as ground transportation or mileage allowance if travel is by personal automobile. CHAVI-ID will reimburse allowable expenses based on actual expenses. Please note that meal expenses will not be reimbursed during CHAVI-ID - supported meetings where meals are provided or when included as part of the registration costs.

List of Non-Allowable Travel Expenses

http://www.treasury.duke.edu/travel/na_expenses.html

In certain circumstances, federal guidelines allow travel and hotel accommodations for one day prior to and one date after a CHAVI-ID -related meeting. Such unusual circumstances must be cleared prior to travel with the CHAVI-ID management office. Failure to do so may result in claim denial.

3. What must be approved by the CHAVI-ID Publications Committee?

Please note that if you wish to present an oral presentation or poster on CHAVI-ID related work at any NON sponsored CHAVI-ID meeting or conference, you must present this request in writing through the CHAVI-ID Publications Committee. The request must also include if there is a need for travel funding. Please note: **Even if funding is not requested, CHAVI-ID policy states that all CHAVI-ID related work that is being presented must adhere to approval through the CHAVI-ID Publications Committee.**

What is the process for requesting travel that was not in the original CHAVI-ID SLG Approved Travel Budget for the current year?

The CHAVI-ID SLG has mandated that consideration of additional funds for international travel will be for those with first **or** last authorship on an abstract submitted to a meeting unless special circumstances exist.

If you are interested in attending a meeting or conference not listed on your approved CHAVI-ID travel budget you must:

- A) Be presenting an oral presentation or poster on CHAVI-ID -related work **OR**
 - B) Have an explanation of why this travel is important to the CHAVI-ID mission
- AND**

C) Submit a request with the above information to the administrator of the CHAVI-ID publications policy, Sabrina Arora (sabrina.arora@duke.edu), PRIOR to the travel-taking place **AND no later than 30 days prior to your travel.**

The publications committee will review the request and determine if the material presented and travel is allowable. When the publications committee has made a decision to approve your abstract, travel, both or a portion of, you will then be notified by the CHAVI-ID Program Office. If the request is approved, you may proceed to make travel arrangements with American Express Business Travel. When appropriate, please cost-share your travel. American Express Business Travel is able to assist with this process.

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4. What documents are required for reimbursement for CHAVI-ID -related travel expenses other than airfare?

Travel related expenses will be reimbursed based on **actual** expense ONLY. Meal reimbursements cannot be claimed during times when meals are provided as part of a CHAVI-ID - sponsored meeting or when included as part of the registration cost.

- A. Travel claims based on actual expenses require all **ORIGINAL, ITEMIZED receipts** to be provided as supporting documentation when submitted to the CHAVI-ID Finance Office for direct reimbursement. **Itemized** receipts are required for **ALL** meals **INCLUDING** room service.
- B. NOTE: **Alcohol is an unallowable expense on an NIH funded award.** Alcohol cannot be listed on **ANY** receipt at any time including your hotel folio/receipt. If a charge for alcohol appears on a receipt submitted for reimbursement, **every item listed on the receipt** becomes unallowable. Any claim for reimbursement will therefore be an unallowable expense to the CHAVI-ID and will be denied.
- C. VAT (Value Added Tax) is an unallowable expense on CHAVI-ID. Receipts showing VAT will be short-paid to deduct the VAT amount that must be covered by the traveler's institutional funds.
- D. Requests for reimbursement must be made directly to the CHAVI-ID Finance Office; you **MUST provide a copy of your passport (both the page with photo and information and the page with the stamp upon entry)** and **I-94 form** with your claim for reimbursement. The I-94 form must be copied prior to your return flight because it must be surrendered when entering your home country. The front and back of this I-94 form must accompany all original receipts with your claim for reimbursement. Failure to provide a copy of your passport and I-94 form along with original receipts for reimbursement may result in denial of your travel claim.
- E. Failure to provide required documentation will result in denial of travel expenses.

5. What if I am attending another meeting or traveling on vacation before/after traveling for CHAVI-ID purposes?

If your original or final destinations differ, or extra stops are included prior to your return, you should request AMEX to price the legs of your trip separately to ensure cost sharing and correct costs are charged to CHAVI-ID. For example, if you are traveling from London to RDU for a CHAVI-ID meeting but then after the meeting decide to travel or attend a meeting elsewhere within the US and depart back to London from NY, you will need to tell AMEX during the booking process up front. At the time of booking, AMEX will ask for a credit card number to charge the non-CHAVI-ID related portion of the travel and charge the fares appropriately. Failure to properly cost-share the travel may result in denial of the entire travel claim.

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References

U.S. General Services Administration (for Travel Resources): <http://www.gsa.gov>

Federal Travel Regulations:

www.gsa.gov/federaltravelregulation