Charging Travel to a Sponsored Project: A/A/R Considerations and Documentation

Travel Costs

Travel costs are the expenses for transportation, lodging, subsistence and related items incurred by individuals who are travelling related to the scope of work of a sponsored project. When charging these costs directly to the project, documentation must be provided to justify that the costs are reasonable and the participation of the individual travelling directly benefits the project.

Do the charges meet all of the following criteria?

- **Allowability**: Is the travel necessary and beneficiary to the project?
- **Allocability**: Does the travel specifically benefit the project?
- **Reasonableness**: Are the charges what a reasonable person would pay for the travel expenses?

If so, then determine appropriate documentation:

Appropriate documentation for demonstrating the A/A/R of charging travel directly to a project depends on the payroll status and relationship to the project of the individual travelling. The below chart is meant to provide general guidance on documentation that may be sufficient to demonstrate the A/A/R of travel charges; however, each situation should be considered independently. For further guidance, contact your Office of Sponsored Projects liaison.

<table>
<thead>
<tr>
<th>Individual’s Payroll Status</th>
<th>Travel may meet A/A/R if..</th>
<th>Possible Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid on the award during the period in which the travel occurred</td>
<td>Individual has expended effort</td>
<td>Payroll records</td>
</tr>
<tr>
<td>Individual was previously paid on the award during the life of the project, but is not currently receiving salary on the award</td>
<td>Individual is specifically named in project’s budget justification; OR, travel for individual was specifically requested within the budget</td>
<td>Budget justification</td>
</tr>
<tr>
<td>Individual was never paid on the award</td>
<td>Individual made a significant scholarly contribution to the project scope</td>
<td>by the PI as to the nature and significance of the contribution, with justification as to why the individual was never paid on the award.</td>
</tr>
</tbody>
</table>

All charges are subject to review by OSP. If it is determined that additional or alternative documentation is necessary, OSP will notify the Grant Manager. If it is determined that the travel charges do not meet the A/A/R threshold, and are therefore unallowable, the travel charges must be transferred to non-project funds.

Documentation Procedures:
When the individual submits receipts and documentation for the travel report, the Grant Manager should include the appropriate documentation on travel report and attach any documents to the corresponding transaction within SAP.

Note: This guidance is administrative in nature and is not a cost reimbursement policy. It does not guarantee general approval for charging travel costs directly to project funds.