

Invitational Travel Fact Sheet

(These items are covered in Chapter 3.8 of the SI Travel Handbook)

Definition:

1. Invitational travel occurs when the travel expenses for a non-SI employee are paid by SI. Travel expenses can be paid by:
 - Concur Travel Authorization, SI unit inviting the traveler creates a Concur authorization for the invitee's travel
 - Purchase Order, SI unit inviting travelers creates a purchase order or orders to acquire airline tickets, lodging and other travel items such as meals and ground transportation. Typically used for groups of 5 or more travelers attending the same event. (Contact SAO Travel for assistance)
 - Honorarium, SI unit inviting the traveler(s) creates a purchase order to pay each traveler an honorarium to cover his/her expenses and fees (traveler must be in the SI vendor system)
2. To qualify as an invitational traveler, the traveler must be either be:
 - A speaker at an SI event, a program expert or advisor; OR
 - An SI intern, fellow, research associate, volunteer, or advisory board member; OR
 - A student, post doc, or other individual collaborating on an SI mission-related program or research project
 - An employee of another federal agency; OR
 - A person providing personal assistance to an employee with special needs; OR
 - An employment applicant traveling at the request of SI
3. **Traveler cannot be a contractor under contract to the inviting unit**
4. If the traveler will receive a payment
 - Traveler must be enrolled in the SI vendor system (use form SI-3881 Travel)
 - If the traveler has a US Tax ID number he/she must submit a W-9 form with vendor enrollment
5. If the traveler will travel often for SI, he/she should be permanently added to the Concur system– submit a Concur User form to create a Concur profile record

Travel Preparation:

1. Unit makes reservations using Concur and SAO Travel
2. Unit provides traveler with a printed copy of authorization
3. Traveler must supply receipts and sign a copy of voucher to receive reimbursement

Call SAO Travel 617-495-7220 or 617-496-7844 for assistance