



BUSINESS OFFICE POLICY

NUMBER/TITLE: BO-207, TRAVEL POLICY

Covered Individuals: All University employees

Covered Locations: All locations

Effective Date: 5/29/24

Strategic Priority: SP 3.2

HLC: 2.A, 2.B

Consultations: Business Office

POLICY STATEMENT

To establish consistent travel practices, which accommodate both the University's requirements for cost control, and also the traveler's need for support and service.

PURPOSE

The Travel Policy identifies approved/non-approved travel expenses, general travel guidelines, and vehicle usage during travel. It also sets forth guidelines for lodging, reimbursements, and travel advancements.

DEFINITIONS

Receipt: A receipt is an original, itemized account of the transaction prepared by the service provider and provided to the service recipient. Meal receipts must list names of those who ate. **Charges made with no matching, itemized receipt will be the responsibility of the individual/traveler/cardholder, with the exception of those considered de minimis (under \$10).**

Accountable Plan: Internal Revenue Service (IRS) plan used by the University for reimbursement of actual travel expenses. Amounts paid under an accountable plan are not wages and are not subject to income tax or social security withholding. An individual traveling on University business should neither gain nor lose personal funds as a result of said travel. Prudence should be exercised when incurring expenses.

Travelers: University employees, members of the University Board of Trustees, registered students, Non-employees engaged by the University (guest speakers, independent contractors, employment applicants, etc)

PC Member: A member of the President's Council (direct report to the President).

Approved Travel Expenses: Those expenses that are allowable when an employee is traveling for University business. These include, but are not limited to:

- Lodging
- Airfare
- Rental vehicles and fuel
- Meals
- Baggage handling fees
- Parking and tolls

- Conference fees
- Costs of obtaining required visas and passports
- Currency conversion fees
- Gratuities, not to exceed 18%
- Pre-approved entertainment expenses incurred by University athletic teams and student organizations while traveling

Non-Approved Travel Expenses: Those expenses which are NOT allowable when an employee is traveling for University Business. These include, but are not limited to:

- Alcoholic beverages (exception of University approved/sponsored events only)
- Salon services
- Damages to employee's personal vehicle
- Excess cost of circuitous or side trips for personal reasons
- Expenses for social or entertainment meetings between University employees
- Fines for traffic violations
- Gifts
- Insurance on personal property
- Interest charges on credit cards
- Valet services
- Loss of personal property, funds, or cash
- Maintenance or repair of personal property
- Normal travel to and from work and home
- Personal entertainment such as movies, shows, magazines, etc
- Purchase of clothing or personal toiletries
- Travel insurance
- Donations
- Costs associated with receiving dependent care (childcare, eldercare, pet care, etc)
- First class or business class upgrades

POLICY IMPLEMENTATION

A. General Travel

1. Before travel arrangements and commitments are made, employees must discuss all travel with their immediate supervisor to approve of the benefit to the University and budget constraints.
2. Travel plans should be booked as far in advance as feasible to secure best pricing. Expenses will be reimbursed or covered for the most economical and reasonable route to the approved destination. Any deviation from this route will be at the employee's expense. Cost to the University should be considered when making bookings and best judgement should be used while keeping employee safety in mind.
3. Professional development travel shall remain conservative in nature and approached for reasons of supporting the University's strategic plan, as approved by the employee's supervisor.
4. All official University travel should be at the most economical rates available.
5. Flights or hotels purchased with frequent traveler points (including the membership dues for these programs) are not reimbursable to the employee.

6. Luggage is the responsibility of the traveler. While reasonable costs for checking bags is allowed, the University is not responsible for replacement or reimbursement of lost luggage.
7. Employees traveling on University business will be covered by the University liability insurance policy as necessary and appropriate.
8. To provide continuity of operations, group travel from the same department/area of the University should be held to a reasonable minimum.
9. When traveling with a spouse/significant other/dependent, the employee will be responsible for all added expenses above the cost of single travel costs. Exceptions must be pre-approved by the CFO.
10. Tips for taxi, Uber, meals, etc are allowed but should be reasonable. The maximum allowable tip is 18%, unless otherwise mandated by the vendor.

B. Vehicle Usage for Travel

1. The University holds a contract with Enterprise Holdings (including both Enterprise and National Car Rental) in which employees can rent vehicles at discounted rates. When a rental car is needed, employees should consider this discount when booking a car.
2. Best judgement should be used when choosing rental car size based on number of employees traveling together and usage of vehicle.
3. Insurance offered by rental car companies should be purchased to cover gaps in limitations of coverage.
4. Those employees based on the Fayette Campus must first consider utilizing a fleet vehicle before renting a vehicle elsewhere. Travelers using the University fleet vehicles must be a qualified driver by the University before use of the fleet vehicles will be permitted.
5. If the employee is requested by the University to use their own vehicle, the related expenses will be reimbursed at the prevailing mileage rate established by the University.
 - i. In accordance with IRS guidelines, mileage to and from your primary work location is not reimbursable.
 - ii. Mileage is not reimbursed to return home for personal reasons and to report back to campus for University functions.
 - iii. Mileage will be reimbursed when an employee attends a University-approved function such as a board of trustees meeting outside of their normal commute, attendance at a professional meeting or recruiting event, errands for University benefit, and others as considered by the employee's supervisor.

C. Lodging

1. Unless pre-approved by the appropriate PC member, lodging costs shall not exceed \$170 per night for domestic travel.
2. Lodging expenses for "no-shows" will be at the expense of the employee unless approved by the appropriate PC member.
3. Travel points earned under frequent stay programs that are redeemed for hotel charges are not reimbursable.
4. When possible, lodging for students should include at least three students per room.

D. Reimbursements

1. The University shall reimburse employees for those ordinary and necessary expenses incurred while traveling on official University business.

2. The employee, in turn, shall strive to travel in the most economical manner possible, consistent with the nature of the trip. In all cases, expenditures should be reasonable, using sound business judgment.
3. Appropriate signed and dated reimbursement forms must be submitted to the employee's supervisor no later than one month from the date of the expenditure, unless stated otherwise herein. Travelers that fail to comply will not be reimbursed for their business expenses.
4. Meals consumed during domestic travel shall not exceed \$40 per full day. Meal expenses incurred above this threshold must have the approval of the appropriate Vice President.
5. Meals that can reasonably be consumed before departing for, or returning from, travel will be at the expense of the employee.

E. Travel Advancements

1. Travel advances may be granted to full-time employees for out-of-pocket expenses expected to be incurred on an upcoming work trip.
2. To secure an advancement, the traveler must fully complete the Travel Advance Authorization Form, including securing proper approval signatures, a minimum of 15 working days prior to the anticipated trip.
3. Requests for advances to the President must be approved by the Chairman of the Board of Trustees prior to disbursement. All other requests must be approved by the traveler's supervisor and appropriate Vice President.
4. Failure to submit required documentation in support of the uses of the advance in a timely manner will result in the denial of future advance requests.
5. Advancements will be issued by check within 15 days of the request date by mail or by pick up in the Business Office. If check is to be mailed and received by a specific date, the completed request must be received by the Business Office two days prior to the weekly check run.

Limitations

- A. Appropriate, signed and dated requests for reimbursement (including the Travel Expense Form) **must be submitted to the employee's supervisor no later than 30 days from the date of the expenditure**, unless stated otherwise herein. Travelers that fail to comply will not be reimbursed for their business expenses.
- B. Travelers that fail to comply to the travel policy will be held liable for all expenses incurred and may be subject to disciplinary action.

CUSTODIAN

Controller/Business Office

RELATED DOCUMENTS, FORMS, AND POLICIES
BO-208 Purchase Card Policy
Travel Expense Form

HISTORY

New/Revision Number:	Date of Action/Approval	Revision Change
BO-207	5/29/24	Replaces 7/14/15 Travel Procedure