

Date Updated and Published: July 2014**Revision History:****Review: Annually****Last Date Reviewed:** November 2019**POLICY**

The following policy applies to the travel of all employees of Bethel University in the performance of their official duties. Provisions of this policy also may apply to individuals other than employees who are authorized to travel at Bethel University expense. Authorization for travel will not be granted and expenses will not be reimbursed unless the travel is made and reimbursement claimed in accordance with this policy and any approved exceptions hereto. Upon approval, credit cards may be used for the payment of registration fees and required advance payments for airline or hotel payments.

All travel must be consistent with the educational, research, and professional needs of Bethel University. Employees must conduct all travel with integrity, in compliance with applicable laws, policies, and procedures, and in a manner that excludes considerations of personal advantage. Employees must exercise good judgment and conduct all aspects of travel in a cost- efficient manner.

GUIDELINES**I. GENERAL PROVISIONS**

- A. No authorization for travel by any employee shall be granted, and no reimbursement for travel expenses shall be made, except in accordance with the provisions of these policies and procedures. Reimbursement for travel expenses shall be limited to expenses incurred upon travel authorized in advance in accordance with Section II.
- B. Travel which may be authorized, and pursuant to which expenses may be reimbursed, shall be limited to the following:
 1. Travel which is necessary for the proper execution of official University business, or in justifiable pursuit of Bethel University's educational and

research objectives; or

2. Travel to meetings and conferences of a professional nature which will increase the attending employee's usefulness to the University.

C. Travel shall not include, and no reimbursement for expenses shall be made for, transportation in connection with an employee's official station of employment. The employee's "official station" is his or her regular area of employment activity, e.g., office headquarters, campus, or designated location of an employee established in the field.

1. The official station of an employee shall be designated by the President and/or Vice President/department head.
2. It is normally expected that the official station is that location at which the employee spends the major portion of his or her working time.
3. For an employee required to be on call (as determined by his or her job description), either overnight or on weekends, the official station of the employee while on call becomes his or her residence, or the location at which the employee receives the call.
4. Reimbursable mileage begins at the location at which the employee receives the call.

D. The employee is considered to be on official travel status, and as such, eligible for reimbursement of travel expenses, at the time of departure from the employee's official station or residence, whichever is applicable, for the purpose of traveling on University business.

1. Expenses for meals will be allowed when overnight travel is required outside the county of the employee's official station or residence.
2. Expenses for lodging will be allowed as set forth in Section III.

E. The limitations on travel expenses contained herein are maximum amounts above which reimbursement shall not be made. Employees are expected to be as conservative as possible in incurring travel expenses.

F. Reimbursement for travel expenses shall only be allowed for actual expenses incurred, subject to the maximum limitations shown on the Addendum.

1. Receipts must accompany claims for reimbursement for all expenses, except for meals. However, detailed receipts are required for meals if being claimed under Bethel University Policy 2.210 or 2.220.
 2. Lodging receipts are required and must itemize room charges and taxes. No expenses shall be reimbursed until after travel has been completed, unless the employee has been approved for a travel advance.
- G. When using websites (such as Expedia.com, Travelocity.com, Hotwire.com, etc.) to make travel arrangements using package deals, documentation is required for each specific item included in the package such as airfare, hotel, and rental car.

II. AUTHORIZATION OF TRAVEL

A. Approving Authorities

1. The President and Vice Presidents, and/or his/her designee, shall have authority to approve travel by employees of the various Colleges/Departments.
2. Authorization for travel by a student, regardless of the destination, shall be approved by the President or Vice President, or his/her designee, of the College/Department.

B. In-State Travel

1. All employees must obtain prior authorization for in-state travel by the employee's appropriate approving authority.
2. Written authorization may not be necessary for in-state travel where the expected expenses will not be substantial, or when there is no advance notice of the circumstances necessitating the travel, and such travel is approved orally by the appropriate approving authority.
3. Employees whose employment requires frequent in-state travel may obtain blanket authorization in writing for such travel.

C. Out-of-State Travel

1. All employees must obtain prior written authorization for out-of-state travel, which must be approved by the employee's appropriate approving authority.
2. The authorization must show the name of the person traveling, purpose

of the trip, destinations, date of departure and return, mode of transportation, estimated expenses, and availability of funds.

3. If, in the normal course of official business, the employee must routinely travel into another state and back in the same day, such travel will be considered in-state travel and shall be subject to the in-state travel provisions.
4. Employees whose employment requires frequent out-of-state travel may obtain blanket authorization in writing for such travel.
5. Authorization for travel by an employee to Alaska, Hawaii, and all out-of-country travel shall be subject to approval by the President.

III. TRANSPORTATION

A. General

1. All travel must be by the most direct or expeditious route possible and any employee who travels by an indirect route must bear any extra expense occasioned thereby.
2. When work is performed by an employee in route to or from the official station, reimbursable mileage is computed by deducting the employee's normal commuting mileage from the actual mileage driven in performing the work in route to or from the official station.
 - For example, if an employee normally commutes 10 miles (20 miles round trip), and performs work on the way home from the official station which results in 12 miles driven, the mileage reimbursement will be for 2 miles only, as that is the amount of mileage in excess of the employee's normal commute.
 - In no instance shall mileage claimed for reimbursement exceed actual miles traveled.

B. Common Carrier Travel

1. When travel is by common carrier, the fare must not exceed the regular coach fare charged the general public, and advantage must be taken of round trip rates when available.
2. The employee's copy of the ticket, or an acceptable receipt, must be submitted for reimbursement of common carrier expenses.

C. Automobile Travel – Personally-Owned Automobiles

1. Use of personally-owned automobiles is authorized to carry out University business.
2. Mileage reimbursement rates are provided on the Addendum.
3. The authorized mileage allowance includes all operating expenses such as gas, oil, and repairs precluding any separate claim for such items.
4. Employees may use reputable websites to determine point-to-point and/or vicinity mileage.
5. Commuter Mileage
 - a. Procedures for calculating mileage are based on the fact that the University is prohibited from reimbursing employees for normal commuting mileage.
 - b. If an employee begins or ends a trip at his/her official station, reimbursable mileage will be the mileage from the official station to the destination.
 - c. If work is performed by an employee in route to or from his/her official station, reimbursable mileage is computed by deducting the employee's normal commuting mileage from the actual mileage driven.
 - d. If an employee begins or ends his/her trip at his/her residence without stopping at his/her official station, reimbursable mileage will be the lesser of the mileage from the employee's residence to his/her destination or his/her official station to the destination. On weekends and holidays, the employee may typically be reimbursed for actual mileage from his/her residence to the destination.
 - e. If an employee travels between destinations without returning to his/her official station or his/her residence, reimbursable mileage is the actual mileage between those destinations.
6. The travel claim must indicate the employee's itinerary (purpose) and must show the official business mileage.
 - a. Business mileage as indicated by a reputable website for out-of-state routes will be regarded as official.

- b. Vicinity mileage must be reported on a separate line and not included with point-to-point mileage. Only mileage on official business may be claimed.

7. Necessary charges for hotel and airport parking will be allowed.

D. Automobile Rentals

1. Charges for automobile rental shall be allowed whenever it is more economical than alternative methods of transportation or it is the only practical means of transportation.
2. Whenever possible, employees should refuel before returning vehicles.

E. Unnecessary meals and lodging expenses which are occasioned by the use of an automobile for reasons of the employee's personal convenience, or which are due to travel by an indirect route, will not be allowed.

F. If travel is by common carrier, the employee will be reimbursed for expenses in traveling to and from the common carrier including related parking expenses. Receipts must be furnished on airport and hotel parking.

IV. LODGING

Employees will be reimbursed for actual lodging expenses plus taxes incurred. Lodging receipts are required and must itemize room charges and taxes by date.

In the event of double occupancy for University employees on official travel, both employees should attach an explanation to his/her travel claim detailing dates and other employees with whom the room was shared. The lodging cost may be claimed by the employee who incurred the cost, or one half the double occupancy charges may be allowable for each employee. The receipt for the entire amount should be submitted with the expense account.

V. MEALS

A. Daily Meals

1. Meals while on authorized travel will be reimbursed, subject to the meal allowance provided on the Addendum.
2. The maximum per diem rates include a fixed allowance for meals

and for incidental expenses (M&I).

3. The M&I rate, or fraction thereof, is payable to the traveler without itemization of expenses or receipts.
 4. Incidentals are intended to include miscellaneous costs associated with travel such as tips for baggage handling, phone calls home, etc.
 5. Reimbursement for meals and incidentals for the day of departure shall be three-fourths of the appropriate M&I rate.
 6. Reimbursement for M&I for the day of return shall be three-fourths of the M&I rate.
 7. While on official travel status, if a meal is provided as part of a training session or conference, the employee must deduct the cost of those meals from the per diem for that day, using the schedule provided in the Addendum.
 8. Reimbursement for meals will not be permitted when overnight travel is not involved.
- B. Official Banquets
When the expenses for an official banquet of a meeting or conference are in excess of the meal allowance, the excess will be allowed provided a receipt or proper explanation of the charge is submitted.
- C. Business Meals
See Policy 2.210 for criteria on reimbursing business meals.

VI. MISCELLANEOUS EXPENSES

- A. Personal Expenses
Expenses for entertainment (employee or others), laundry, tips and gratuities, etc., are personal expenses and will not be reimbursed in excess of the incidental portion of the M&I rate.
- B. Telephone, Internet and Fax Expenses
 1. Charges for long distance telephone calls, internet, and/or fax on official business will be allowed.
 2. Charges for necessary local calls on official business will be allowed.
- C. Registration Fees
Registration fees for approved conferences, conventions, seminars,

meetings, etc., will be allowed including cost of official banquets and/or luncheons, if authorized in advance by the appropriate approving authority, and provided receipts are submitted with the travel claim.

VII. CLAIMS

The standard form for claims for travel expenses shall be used for reimbursement of expenses.

1. The form must show movement and detail of expenses on a daily basis, be signed in ink or electronically by the employee, and be approved by the appropriate approving authority prior to reimbursement.
2. All signatures on travel claims must be original or electronic.
3. Receipts for appropriate expenses must be attached to the form.
4. Claims for reimbursement for travel expenses should be submitted no later than thirty (30) days after completion of the travel.

VIII. TRAVEL ADVANCES

1. Normally travel expenses should be paid when incurred by an employee, with reimbursement made to the employee for actual expenses upon proper submission of a claim for travel expenses.
2. Advances to employees for anticipated travel expenses may be made upon proper approval.
3. All travel advances must be approved by the President, Vice President(s), or Director of Business Affairs for employees of the University.

IX. EXCEPTIONS

The President shall have the authority to grant exceptions to any part or all of the provisions of this policy when deemed appropriate and necessary.

RESPONSIBLE PARTIES

Cabinet-level Officers, Department Supervisors, Business Office personnel, any/all employee(s) traveling on official business for the University

PUBLICATION

This policy is published on the University's website.

BethelUniversity

Standard Reimbursement Rates

November 1, 2017

Standard Mileage Rate \$.40/mile

MEALS & INCIDENTALS RATES (M&I)

	<u>Maximum M & I</u>	<u>75% of M & I</u>
Non-Metropolitan Areas	\$38.00	\$28.50
Metropolitan Areas	\$44.00	\$33.00

MEALS & INCIDENTALS ALLOCATED BY MEAL NON METROPOLITAN AREAS

Breakfast	\$7.00	\$5.25
Lunch	\$10.00	\$7.50
Dinner	\$15.00	\$11.25
Incidentals	\$6.00	\$4.50

MEALS & INCIDENTALS ALLOCATED BY MEAL METROPOLITAN AREAS

Breakfast	\$9.00	\$6.75
Lunch	\$11.00	\$8.25
Dinner	\$18.00	\$13.50
Incidentals	\$6.00	\$4.50

Note: Meals and incidentals are reimbursed at 75% for day of departure and day of return.