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Purchasing

Travel Policy

revised 12/6/2011

Please also see the related [Entertainment and Gift Policy](#) and [Travel Policy FAQ](#).

PURPOSE

Clark University's travel policy is designed to provide uniform guidelines and procedures regarding travel, and the management of related expenditures, by faculty and staff on University business. The intent of this policy is that reimbursement be fair to faculty and staff and equitable across the University.

Travelers on University business are responsible for complying with the guidelines and procedures as described in this document. As it is impossible to anticipate every situation that may be encountered while traveling on business, each traveler is expected to exercise good judgment and sensitivity to their own safety when making decisions about expenditures and travel logistics.

The University will reimburse travelers for comfortable and safe accommodations for lodging, meals and transportation. The University reserves the right to deny reimbursement of expenses that are considered lavish, extravagant or are not supported by sufficient documentation.

SCOPE

These policies and procedures apply to all who travel for the University, regardless of the source of funds (including graduate students receiving a stipend). Travel expenses for non-university employees, such as consultants, speakers, lecturers, visiting professors, or candidates for positions are reimbursed in accordance with contract for services and vendor payment procedures. If travel costs are charged to a sponsored project, the grant or contract guidelines must take precedence if they are more restrictive than University policy.

At their discretion, departments may impose more restrictive guidelines for budgetary or control reasons.

Exceptions to this policy must be approved, in writing, by the President, Provost, Executive Vice President or the Vice President for Budgets and Planning. The signed approval, along with an explanation and justification must accompany the Travel Expense Form.

TRAVEL AUTHORIZATION

Travel on University business must be authorized in advance by the Vice President, Dean, Department Chairperson, or Director responsible for the travel budget. This individual is responsible for assuring that budgeted funds are available to meet all travel commitments.

TRANSPORTATION

Travelers are to choose the most practical and economical mode of transportation, and are generally to travel the most direct route. Consideration is to be given to the total cost to the University, including the cost of traveler subsistence and lost work time. When reviewing travel options to find the most economical lodging and transportation options, discount services that require a non-refundable payment may be utilized as long as there is very little uncertainty surrounding the completion of the travel plans.

More expensive transportation (Business Class for example) may be used if the traveler pays the incremental difference over the allowed cost. In such a case, the traveler must provide clear documentation of the lowest priced cost obtained from a Clark approved travel agent.

Commercial Air Travel

Air travel is recommended when the cost of a faculty or staff member's time is an important factor or when travel time by other methods would increase the subsistence expense. Generally, air travel is appropriate for travel beyond 200 miles from campus. The University will reimburse airfare only for the coach fare rate. For airline bookings, reserving space thirty days in advance and booking over a Saturday night can result in significant savings. However, cancellation fees can be substantial once bookings are made. Therefore, travelers are encouraged to book as far ahead of departure date as possible but book only when business plans are firm. Nominal fees charged for checking luggage and early check-in, etc. will be allowed.

Foreign Air Travel

- When foreign travel (outside of the United States) is charged to federal grants, whether on a direct or indirect cost basis, federal regulations allow the traveler to use a foreign air carrier but the ticket must be issued by a U.S. carrier or its agent. "This requirement shall not be influenced by factors of cost, convenience or personal travel preference." There may be situations where a domestic carrier is not available. The travel agent should document this to meet federal requirements.
- When traveling abroad, please check the State Department's travel advisories prior to departing on your trip. (<http://travel.state.gov>)
- Please see the section of the Travel Policy relating to insurance/travel assistance for important information.
- All travelers visiting foreign countries should provide the Business Manager with the following information in advance their trip: traveler name, destination, dates of visit. This information is needed for insurance purposes.

Frequent Flyer Programs

The University allows individuals to retain frequent flyer coupons earned on University business travel. If traveling on American Airlines, please also provide Clark's Business ExtrAA number (831510), which also provides frequent flier benefits to Clark. Please see the the [Business ExtrAA](#) page for more details.

Cancellation Penalties

The University will pay for the expense if a penalty is imposed because it is necessary for a ticket to be changed or cancelled due to a reasonable, documented, change in plans.

Ground Transportation

Airport limousines or vans are to be used whenever they are available and are more economical than private taxicabs. Single passenger or luxury limousine service will not be reimbursed for faculty or staff travel.

Rail Travel

Rail travel should be considered, particularly if it allows travel directly to a mid-city destination that will eliminate expensive cab fares from airports to downtown. The University will generally reimburse rail travel only for the coach fare rate. Business class will be reimbursed if it is necessary for the traveler to be engaged in University related work during the rail travel.

Personal Automobile

The University will pay the prevailing standard IRS rate per mile in effect for official travel by private automobile. This mileage reimbursement is intended to cover all actual automobile expenses such as fuel, repairs, maintenance, physical damage, tires, depreciation and insurance. Travelers will be reimbursed for tolls and parking.

Travelers will be reimbursed mileage based on the actual driving distance by the most direct route or the standard mileage chart used by the University. In no case should the request for mileage reimbursement include miles that would be part of the traveler's normal commute if traveling directly from or to home. The miles normally traveled should be deducted from the total business trip miles when requesting reimbursement. The University cannot provide reimbursement for commuting expenses between home and the campus. If two or more people travel together by private automobile for business, reimbursement is limited to one individual.

All Clark faculty and staff are protected by the University's automobile liability insurance for injury claims brought against them arising out of their use of a University-owned automobile or a hired automobile. Travelers using their personal automobile on University business are primarily protected by the vehicle owner's insurance policy. Should the owner's insurance limits be exceeded due to a catastrophic accident, the University's "non-owned automobile insurance" (and umbrella coverage, if necessary) would apply.

Traffic fines or parking violations are solely the responsibility of the traveler and will not be reimbursed.

An accurate daily record of miles traveled is to be maintained. Upon completion of travel, mileage and expenses are to be submitted on a Travel Expense Report form.

Rental Car

The use of a rental car must be justified as an economical need and not as a matter of personal convenience. Automobiles should be rented only when public transportation and taxis are impractical, more expensive or not available. Travelers will be reimbursed for no more than the rental cost of a mid-size car, unless dictated by specific business reasons, and gas expenses for the rental car (GPS rental is permissible if the traveler is travelling to an unfamiliar location). The traveler is to do business with the rental car agency offering the best rates. (Information regarding the rental car agencies that provide special discounts to University travelers is available on the [purchasing resources website](#).)

For local trips, travelers should weigh the costs of using their personal vehicle vs. the cost of a rental car. When calculating the difference, factors such as the length of the rental period, the price of gas, and the staff time involved in renting a vehicle should be taken into account. In general, personal vehicles should be used for trips of less than 100 miles per day, either personal or a rental vehicle for trips between 100-200 miles per day, and a rental vehicle for trips greater than 200 miles per day. Enterprise provides a [calculator at their web site](#) which may be helpful to you in making this determination.

The University's insurance provides for both liability and physical damage for travelers who rent vehicles while on authorized University business. The coverage extends for car rentals in the US, Canada, Puerto Rico and US territories - therefore please waive all of the rental agency's insurance coverage. Travelers must, however, purchase comprehensive and collision insurance for any non-US or Canadian rentals.

Public Transportation

As the preferred mode of transportation, public transportation is to be used whenever possible and practical.

Shuttle Service

The cost of shuttle service to and from airports and railroad stations, plus reasonable tips, is reimbursable. For local shuttle service, please consult the purchasing website for information regarding discounted rates. The cost of shared shuttle van service to Boston or Providence is encouraged as it is generally lower than mileage reimbursement and parking.

Parking

Parking expenses will be reimbursed with appropriate receipt. Unless the valet parking is less expensive than self-parking, valet parking is not reimbursed if there are other safe and reasonably convenient options.

LODGING

Hotel accommodations should be chosen based on economy, safety, and a reasonable level of comfort. The proximity of lodging to the traveler's destination, such as a conference location, should also be a factor if it can reduce transportation expenses (cab fare, subway, etc). Lodging reimbursement is limited to single occupancy, single rooms only, unless rental accommodations are shared by more than one authorized traveler.

The University has access to special discounted rates through various hotel chains. [Please check the hotels page](#) for updated discount information. Travelers are strongly encouraged to take advantage of these negotiated discounted hotel rates. Making lodging reservations in advance notice will help assure the best accommodations at the most reasonable cost.

Occasionally, a traveler may stay in a private home in lieu of public accommodations. In such circumstances, it is appropriate to treat the hosts to a meal or a gift (not to exceed \$100). Receipts for these expenses must be submitted with the expense reimbursement voucher. Such hospitality expenses are not reimbursable under government grants and contracts.

When faculty members are traveling to a conference for the purposes of recruiting, no more than 2 people should attend and their stay should be limited to 3 nights. Any exceptions require the approval of the Provost. The rental of a suite for recruiting purposes is allowable and should be occupied by one or more of the attendees.

MEALS

With itemized original receipts, travelers are reimbursed for the actual, reasonable cost, including tax and gratuity, of his or her meals during the travel period. To secure reimbursement following completion of travel, appropriate itemized receipts for all meals must accompany a properly completed Travel Expense Report form. A credit card receipt alone is not sufficient but should also be submitted to document any tips. An alcoholic beverage to accompany dinner may be purchased

(no alcoholic beverage can be reimbursed for meals charged to government grants).

If reimbursement is for persons other than the traveler, IRS regulations require that the names of the individuals involved and the purpose of the expense be provided (see IRS Guidelines section below).

- Per Diem Allowance

Recognizing that it may not always be practical or possible to establish actual reimbursable expenses for meals, travelers may choose to be reimbursed on a per diem basis in lieu of actual expenses. Per diem reimbursement for these expenses is the payment to the traveler of a fixed amount per day to cover the cost of meals and all related taxes and gratuities necessarily incurred. With a per diem allowance, the traveler is not required to provide documentation and an itemization of actual meal costs but is required to provide documentation that authorized travel did occur. This method of reimbursement may be advantageous in circumstances where an individual traveler's actual expenses are difficult to separate from those of a group that is sharing costs, when receipts were lost, or when the record keeping involved in actual reimbursement would be unusually difficult.

The per-diem meal rate is a maximum \$52 per day. For partial travel days (which include at least one meal period), the per diem allowance is a maximum of \$25 per day. For the purposes of determining a full/partial day, travel will be a full day if the traveler leaves before 7:00am or returns after 7:00pm. Federal grants are subject to separate federal per-diem rates. Departments are free to set a lower per-diem rate for budgetary control purposes. Per-diem rates can only be used when the travel includes an overnight stay. If a Clark issued credit card is used to pay for meals, per-diem method cannot be used - an itemized receipt is required.

- Conference Meals

Conferencemeals may be included in the registration fee or billed separately. The University will reimburse the traveler for meals billed separately when appropriate documentation is provided. If a conference meal has been paid for (either through registration fees or separate billing), faculty and staff will not be reimbursed for purchasing an alternate meal.

TRAVEL INSURANCE/ASSISTANCE

All Travelers - The University carries life insurance as well as insurance for medical expenses resulting from an accident while traveling. This insurance covers accidents only and does not apply to illness, disease or bodily infirmity. This coverage may have limits when visiting countries considered a war zone. A list of war risk countries is maintained on the University's risk management website. Please contact the Business Manager if you have any questions regarding the details of Clark's insurance coverage.

Faculty and staff injured **while working** during a business trip are covered by workers compensation insurance for medical expenses and lost wages. Please promptly report any work-related injury to the Human Resources department.

International Travelers

When traveling to foreign countries, faculty, staff, and students also have access to travel assistance services which cover:

- Assistance for medical emergencies including emergency medical evacuation and repatriation.
- Emergency medication assistance
- Lost document assistance
- Emergency cash advance
- Legal access
- Emergency translations and interpreters
- Emergency political evacuation
- Concierge services

Download a [travel assistance summary](#) or [a travel card](#) with important policy and contact numbers.

MISCELLANEOUS TRAVEL EXPENSES

(See Exhibit A for a schedule of permissible and non-permissible expenses.)

Telephone - All necessary business calls and messages, including fax, are reimbursable. Personal phone calls to maintain reasonable contact with the traveler's family are reimbursable; normally this would be one call per day for a fifteen-minute period or less. Telephones on planes should only be used in emergency situations.

Tips and Gratuities -Gratuities for business meals are recommended at 18% but should not exceed 20%. Reasonable tips for bellhops, baggage handlers, limousines, taxis and hotel maid service are allowed.

Laundry - Reasonable laundry and dry cleaning expenses will only be reimbursed for business trips of seven or more days.

Internet Access - The University will reimburse a traveler for charges related to accessing the internet for purposes of accessing Clark email or performing research related activities while traveling on University business.

PAYMENTS, REIMBURSEMENT & DOCUMENTATION

Credit Cards

Clark University provides American Express cards to faculty or staff who travel frequently on University business. To request an American Express card, please contact the Vice President for Budget and Planning. Clark procurement cards (P-Cards) are not to be use for travel or meals.

Travelers without a Clark American Express Card should use their own personal credit card and submit a reimbursement request. A travel advance is also available to provide cash up-front (see below).

Travel Advance Form

In the event that a traveler does not have a Clark American Express credit card and/or requires funds to cover expense, a cash advance may be requested. All cash advances must be submitted using the appropriate form. The forms can be found on Clark Commons in the [Accounts Payable section](#) of the Business & Financial Services Documents and Forms. Advances are not to be used for reimbursement of expenditures that have already occurred -request a reimbursement using the Travel Expense Report Form. Advances must be accounted for within two weeks of completion of the trip. No further advances will be processed until all outstanding advances are accounted for. Any reimbursement requests will be deducted from outstanding advances.

Note that the form requires the ultimate budget charge line for the expenses as well as the approval

of the person or designee authorized for that budget. No person is authorized to approve an advance for themselves. Advances require subsequent approval from the finance department as outlined:

- Senior Assistant Controller is authorized to approve an advance of \$1,000 or less.
- The Controller is authorized to approve advances between \$1,001 and \$5,000.
- Any advance greater than \$5,000 requires a second approval from either the Executive Vice President or the Vice President for Budgets and Planning.
- Advances are not to be used for reimbursement of expenditures that have already occurred - request a reimbursement using the Travel Expense Report Form

Travel Expense Report Form and Documentation Requirements

The University requires a completed Travel Expense Report to account for any business/travel expenses which are to be charged to a University account. The properly completed and approved form should be submitted within ten working days after returning from each trip or incurring the expense and as soon as supporting receipt documentation can be reasonably obtained. Expenses are to be within established guidelines and will be reimbursed with proper documentation accompanying the Travel Expense Report.

An [online Travel Expense Report](#) is available.

While original, itemized, receipts are recommended for all expenses submitted for reimbursement, they are required for all non-meal expenses greater than \$25.00. Itemized receipts are required for all meals unless the traveler is using per-diem rates. Requests for exceptions to this policy should document extenuating circumstances and be approved by the traveler's supervisor and an administrator of Business and Financial Services. It is expected that travelers make an effort to obtain duplicate copies of missing or lost receipts but if a copy cannot be obtained they should complete the Affidavit of Lost Receipt form [available online](#).

If copies of receipts are submitted then the traveler should note the reason why the copy (rather than the original) was not submitted.

IRS Guidelines

The IRS requires that all meal expenditures must document the following information:

- List of attendees (self if alone)
- The business purpose of the meal (topic of discussion)
- The cost (supported by detailed receipt, unless using per-diem rate)
- The location
- The date
- Description of meal (i.e. lunch, dinner)

It is recommended that a [Meal and Entertainment Documentation Form](#) be used to document this information.

The IRS requires that all travel expenses and advances be accounted for within 60 days from the completion of the travel. Any unaccounted for travel expenses or advances beyond the 60 day limit must be added to W-2 taxable earnings and appropriate taxes withheld from the next regular paycheck of the traveler. Once this action is taken, IRS regulations do not allow for reversal, even if the reporting is later completed."

Commitment To Timely Reimbursement

The Business and Finance Office will normally reimburse travelers for an approved Travel Expense Report that is accurate and supported by sufficient documentation within two weeks of it being received by the Accounts Payable Office. Certain circumstances (year-end audit, illness, staffing shortages, etc.) may create delays in which case the traveler will be reimbursed within three weeks.

This should minimize the impact which any business travel would have on the traveler's personal credit lines and/or cash flow.

Approvals

Check Requests, Travel Expense Reports, American Express Statements, or Purchase Order, together with required documentation, must be submitted to the traveler's immediate supervisor for review and signature approval.

In the absence of the immediate supervisor, approval from the next higher level of supervision or the departmental Vice President is required.

Supervisors approving expense reports are responsible to ensure the following:

- Expenses reported are proper and reimbursable under this policy
- The expense report has been filled out accurately and has the required documentation
- The expenses are reasonable and necessary

Exhibit A: Summary of permissible/non-permissible expenses

Permissible Expenses

The following items are reimbursable as described below:

- Air travel booked at lowest coach fares.
- Lodging for approved business travel in moderately priced single occupancy accommodations.
- Meals while in travel status (in accordance with written policy).
- Tips for business meals (20%), bellhops, baggage handlers, taxis, maid service.
- Telephone charges while on travel status, relating to business and personal phone calls to maintain reasonable contact with family.
- Mileage allowance for personal auto use on University business at current rate per guidelines.
- Tolls, parking, etc., while on University business.
- Taxis and other local transportation while on travel status.
- Rental of mid-size car.
- Laundry and dry cleaning expenses for travel period if away seven nights or longer
- Conference fees.
- Business entertainment essential to the transactions of University business which is consistent with University policy.
- Internet access fees for purposes of accessing Clark email or performing research related activities while traveling on University business.
- Visa fees for international business travel.
- GPS device with car rental, if travelling to unfamiliar location.

Non-Permissible Expenses

The following items are intended to be a representative list of expenses that are not eligible for reimbursement. However, the list is not all- inclusive.

- Airline stopover charges (additional airfare, lodging, etc.) when made for personal convenience.
- Loss or theft of a cash travel advance or personal items.
- Car rental charge over mid-size rate (unless directed by specific business reasons).
- Driver's license issuance or renewal fees.

- Gas, repairs & other operating expenses for personal vehicle if reimbursed using mileage rate.
- Laundry and dry-cleaning expenses for trips lasting less than seven days.
- Luggage (claim for damage to personal property must be filed with the transportation carrier).
- Personal credit card membership dues, fees or charges including liability insurance for lost card or use by third parties.
- Personal expenses (i.e. toiletries, barber, masseur, city tours, personal entertainment, etc.).
- Telephone charges from airplane.
- Traffic fines, parking violations and court costs.
- Transportation between home and work location when not on travel status.
- Traveler's check fees.
- Unauthorized trips or entertainment.
- Unauthorized use of company charge cards.
- Unreasonable meal expenses
- In-room movies or mini-bar services.
- Departmental functions (luncheons, dinners, holiday celebrations, etc.)

(also see [Frequently Asked Questions](#))