



Title:	Travel Policy
Effective Date:	Reviewed May 1, 2021
Approved By:	President's Council
Responsible Party:	Vice President of Finance
History:	8/8/17; 12/14/18
Related Documents:	Use of Personal Vehicles Policy; Corporate Credit Card Policy

I. Purpose

Salus University (SU) understands that travel is essential to the teaching, research and public service missions of the University. This policy addresses authorization for travel related to University business and allowable expenditures related to such travel. Travel sponsored by a grant must comply with sponsor and regulatory requirements. This policy applies to travel where the employee uses their personal credit card. Please refer to the Salus Credit Card policy for travel paid on a Salus credit card.

II. Definitions

- **Per Diem** - A per diem is a daily allowance determined by the U.S. government to cover meals, lodging and incidentals while traveling for business purposes. Per diem amounts are published by
 - the General Services Administration (Domestic) for continental USA <http://www.gsa.gov/portal/content/104877> and
 - US Dept of Defense For Hawaii and Alaska <http://www.defensetravel.dod.mil/site/perdiemCalc.cfm> and
 - State Department (International) and are specific to major cities. https://aoprals.state.gov/web920/per_diem.asp
- **Policy**

Salus University will reimburse individuals for reasonable, authorized and appropriately documented travel expenditures as described below. The traveler is responsible for understanding this policy before planning and commencing travel for the University. Expense limits will be strictly enforced. All travelers must complete and submit a Travel Expense Report within 30 calendar days of the conclusion of the trip. Failure to complete the Travel Expense Report in a timely manner may result in a delay or denial of reimbursement. A late submission of the Travel Expense Report must include a justification statement and approval by the Provost, Vice President or Dean.

More restrictive travel expense guidelines pertaining to individual departments or colleges may be specified by the Provost, a Vice President, Dean, or Director depending upon budgetary constraints

IV. Procedure

This policy is divided into the following major sections:

- A) Travel Authorization
- B) Types of Travel
- C) Lodging, Meals, Registration Fees and Miscellaneous Expenses
- D) International Travel
- E) Domestic Travel Arrangements
- F) Pre-Payments/Payment/Reimbursement
- G) Travel on Sponsored Projects
- H) Reporting and Documentation
- I) Miscellaneous

V. TRAVEL AUTHORIZATION

Approval for all overnight travel must be obtained from the employee's supervisor before the travel occurs. Same day travel does not require pre-approval; however, it is subject to the same reimbursement and documentation procedures, and may have special restrictions as noted within the policy below. Approval for travel for candidates for employment, students, speakers, or guests must be obtained from the Provost, a Vice President, or Dean, of the college paying for the travel.

VI. TYPES OF TRAVEL

- **Domestic Travel** consists of travel to any destination within the United States, including Alaska and Hawaii, and all United States possessions and territories.
- **International Travel** consists of travel to any destination outside of the United States and its possessions, territories, and entities.
- **Group Travel** is travel by more than one University employee or student who is traveling together. Examples of group travel include the following:
 - -Travel for University-sponsored humanitarian service;
 - -Employees traveling together for seminars or conferences;
 - -Travel by students or employees to attend University-sponsored/ supported activities or events for which the employee and/or the student are acting as official representatives of the University.
- **Incidental Travel** consists of travel to short distances such as between SU campuses or running business errands, etc.
- **Same Day Travel** consists of travel within the same day and does not require overnight stay. Such travel may include travel for local seminars, meetings, etc.

- **Overnight Travel** consists of travel that requires lodging for overnight stay.
- **Recruiting / Speakers / Visitor's Travel** consists of travel by non-University individuals; such travel expenses are reimbursable only if the purpose is for University business.

C) LODGING, MEALS, REGISTRATION FEES AND MISC EXPENSES

Lodging

Travelers are expected to select lodging that meets the budget and business needs. Receipts are not required for lodging when reimbursed at the per diem rate.

- **Non-Conference** – Domestic or International lodging: Departments will reimburse travelers lodging for the destination city, as referenced on the US Government General Services Administration (GSA) website for domestic lodging and the U.S. Department of State website for international lodging. In situations where a non-conference domestic lodging rate falls above the GSA guideline, the traveler must obtain pre-approval from the appropriate authorized approver. If the traveler does not obtain prior approval, the supervisor may deduct the overage from the reimbursement request. Rates for Hawaii or Alaska can be found on the Department of Defense website.
- **Conference** – Domestic or International lodging: The lodging rate limit does not apply to conference travel, where the traveler is paying a pre-negotiated rate offered by the conference. In cases where conference facilities are completely booked, travelers should obtain lodging based on the non-conference guidelines provided above.
- **Local Lodging** – Employees traveling locally typically do not require an overnight stay. However, in certain circumstances, such as when a department or college hosts a multi-day conference or event on/near a University campus an employee may stay overnight at a hotel that is in the same city or town as their residence, only when the department or college has pre-approved the stay. Documentation of the business purpose of the local stay must be submitted with receipts.

Meals and Incidentals

- Travelers are reimbursed up to the Meals and Incidental Expenses (Meals and Incidentals) per diem (specific for the destination city and time of year of their travel) according to the GSA website for domestic travel or the U.S. Department of State website for international travel.
- Travelers do not need to provide receipts for reimbursement of travel meals or incidental expenses included in the daily per diem. Maximum meal rates include tax and tips.

Meals - Conferences

- The University does not reimburse meals included with a conference. If a conference includes meals then the University reimburses only the meals where the traveler

incurred an expense. *The GSA and U.S. Department of State websites provide separate amounts for breakfast, lunch and dinner should you need to deduct any of those meals from your travel voucher.*

Registration Fees

Registration fees at meetings and/or conferences may be reimbursed. Itemized receipts are required

Registration fees placed on a personal credit card should be itemized on the Travel Expense Report. Additional fees over and above the base conference fees for outings and other social events at a conference or meeting are considered personal in nature and are not reimbursable.

D) INTERNATIONAL TRAVEL

Faculty and staff who plan to travel to foreign countries must comply with the regulations noted within this travel policy. Individuals are responsible for consulting with their healthcare insurance provider to determine if they are covered. If not covered, they can contact the Business Office to determine eligibility for the University's foreign travel insurance.

Salus University prohibits travel where the U.S. State Department has issued an official level 4 Travel Warning and recommend against, but does not prohibit, travel to countries or regions where the U.S. State Department has issued an official level 3 Travel Warning or where there is other reliable information of significant health or safety risks.

Passports and Visas

Salus University does not reimburse costs associated with passport application and/or renewal. However, the University may reimburse faculty and staff for costs associated with visas related to University business. In addition, the University may reimburse faculty and staff for costs associated with required / recommended immunizations.

Carriers for International Travel and Fly America Act

International travel by air or other common carrier should be at the lowest available coach or economy fare consistent with scheduling needs, including the need to conserve time by selecting direct flights when available and appropriate. For international flights with a leg of six

(6) or more consecutive hours, the University may pay for or reimburse for economy plus or business class fare for the entire trip with departmental, provost or vice president approvals. Frequent flyer miles may be used by the traveler to upgrade for overseas flights. In accordance with the Fly America Act, commercial air travel on certain grants must use U.S. flag air carrier service except under certain conditions. Travelers using federal grant funds must check with their assigned grant administrator before booking flights to ensure travel arrangements are in compliance.

Car Rental on International Travel

EXCEPT FOR CANADA, when renting an automobile in a foreign country it is required that all local, statutory and optional coverages, including collision damage waiver insurance, are

purchased. The automobile coverage provided by SU policy will apply excess over any applicable local automobile insurance purchased. The University will pay for or reimburse for these rental coverages with appropriate documentation.

Ground Transportation on International Travel

The University may pay for or reimburse for ground transportation and related expenses, such as shuttle bus (between airport and hotel), taxi, bus, subway, tram, train and parking. Care should be given to use the lowest cost transportation. Obtain original itemized receipts.

E) DOMESTIC TRAVEL

A traveler on University business should select a mode of transportation that is safe, cost-effective, and efficient. Travel arrangements should be made as early as possible to take advantage of lower rates. Ideally, arrangements should be made 30 days in advance of a trip.

Common Carrier (including public charters)

Travel by air or other common carrier must be at the lowest available coach or economy fare consistent with scheduling needs, including the need to conserve time by selecting direct flights when available and appropriate. The University will not pay for or reimburse for first class or business fare unless warranted by a medical condition, recommended by the traveler's physician, and on file with Human Resources prior to purchasing the airline ticket, and pre-approved by the traveler's supervisor. Frequent flyer miles may be used by the traveler to upgrade. The University will not pay for travel insurance unless approved in advance. The University will pay for an airline seat assignment fee for coach travel.

Travelers on University business who elect to travel on weekends in order to obtain lower fares may be reimbursed for living expenses on the extra days if the end result reduces the total travel costs associated with the trip. Refer to extended stays in *Pre-Payments / Payment / Reimbursement* section.

Vouchers or credits for unused air tickets must be used for University business. Such credit is to be used within one year of the booking date or before it expires. A rebooking fee will apply. As these actions are driven primarily by the airlines they are subject to change without notice.

Privately-owned Aircraft

Travel by privately-owned aircraft is prohibited.

Personally-owned Vehicles

Please refer to the Personal Use of Vehicle Policy. The University will reimburse mileage for a personally-owned vehicle as the primary mode of travel transportation providing that the cost does not exceed the least expensive airfare or rental car or if the destination is not otherwise accessible.

A valid driver's license issued within the United States or Canada (or foreign license acceptable by the PA Department of Transportation) is required for reimbursement of expenses. Furthermore, travel by privately-owned vehicle is authorized only if the owner thereof is insured under a policy of liability insurance providing coverage for third-party bodily injury and property damage at a minimum comprehensive limit of \$100,000. Such policy must carry an explicit description or appropriate reference of the vehicle(s) covered and shall insure the person operating the vehicle. The mileage rate used by the University is established by the Internal Revenue Service.

University Vehicles

If traveling by University vehicle, reimbursement is authorized for incurred service expenses necessary to the efficient and safe operation of a university-owned vehicle. Original itemized receipts are required for all reimbursements. Mileage is not reimbursable when traveling by University vehicle or courtesy car

Rental Vehicles

Reimbursement for car rental is limited up to intermediate size or lowest rate classifications for individual travelers. Full-size vehicles or vans are allowed for groups when traveling. In the case of rentals for group travel, all authorized drivers must be listed on the rental contract. If renting an automobile, rental charges and actual fuel expenses are reimbursable in lieu of mileage. For domestic travel, original itemized receipts from the car rental agency must be submitted with the Travel Expense Form. Only costs for auto rental will be reimbursed; no other insurances or additional coverages offered by the car rental agencies will be reimbursed as coverage is provided by the University insurance policy.

Vehicle rentals may be used as the means of transportation to and from a trip destination only when the overall cost of the rental is less than the cost of other means of transportation.

Ground Transportation

The University may pay for or reimburse ground transportation and related expenses, such as shuttle bus (between airport and hotel), taxi, bus, subway, tram, train and parking. Care should be given to use the lowest cost transportation. Obtain original itemized receipts when possible.

F) PRE-PAYMENTS / PAYMENT / REIMBURSEMENT

Pre-payment of authorized travel expenses is possible for transportation (e.g., airline tickets) and/or registration fee reimbursements.

If authorized, the traveler may use a SU Credit Card to pay allowable travel charges, provided per diem allowances and other limits noted in this policy are followed. Original itemized receipts are required to be submitted with credit card statement in accordance with the Credit Card Policy. If the traveler incurs additional costs not charged to a SU Credit Card, the traveler should complete a Travel Expense Report for those out of pocket expenses

If the traveler is unsure of the limits or balance of their per-person per day allowance, they should use their own credit card and seek reimbursement via the Travel Expense Report upon return.

Overages

In the unlikely event that a traveler's reimbursement is overpaid, the excess must be returned immediately. Failure to do so may result in disciplinary action up to and including termination.

Personal Funds

Travelers should review reimbursement guidelines before spending personal funds for business travel to determine if such expenses are allowable and reimbursable. Employees should not use personal funds to pay travel expenses on behalf of prospective faculty, staff, students, guests or colleagues. Travelers who use personal funds to obtain transportation (e.g., airline tickets) and/or to pay registrations fees may optionally choose to be reimbursed prior to the trip by submitting a completed and approved Travel Expense Report along with original itemized receipts and any supporting documentation.

Personal Convenience Expenses

Expenses not directly related to the business travel requirements may not be charged to, and will not be reimbursed by the university. Some examples of personal convenience expense items include private car and hired driver, haircuts and personal grooming, spa services, laundry and dry cleaning, passports, immunizations and visas when not required as a specific and necessary condition of the travel assignment, personal entertainment expenses including but not limited to in-flight movies, headsets, health club facilities, hotel pay-per-view movies, in-theatre movies, social activities and related incidental costs. Laundry and dry cleaning expenses may be reimbursed by the University for a Business Trip lasting seven days or longer.

Club Memberships

The University will not pay for or reimburse for airline club memberships.

Cancellations

Costs incurred by a traveler's failure to cancel travel or hotel reservations in a timely fashion are the responsibility of the traveler and will not be reimbursed by the university.

Extended Stays

In cases where vacation time is added to a business trip, any cost variance in expenses such as airfare, car rental and/or lodging must be clearly identified. The University will not pre-pay any personal expenses with the intention of being "repaid" at a later time, nor will any personal expenses be reimbursed. The cost of the extended trip cannot exceed what the trip would otherwise cost the university.

Gratuities

Gratuities are included in per person per day meal rate and are authorized up to 20% of the cost of the meal. Hotel gratuity may be reimbursed if reasonable and approved by the traveler's supervisor.

Long-term Travel

Federal law dictates that travel expenses for employees may not be paid in a tax-free basis if the travel is reasonably expected to last longer than one year, or the travel does in fact last longer

than one year. All expenses, including lodging or other expenses otherwise paid to a third party, for such long-term travel must be paid directly to the SU employee on a fully taxable basis through the payroll system.

Spousal

Spousal travel consists only of travel by a spouse related to recruitment for employment. This must be approved in advance by the Provost or President.

G) TRAVEL ON SPONSORED PROJECTS

The Grant administrator should be contacted for guidelines and restrictions for travel pertaining to sponsored projects.

H) REPORTING AND DOCUMENTATION

Travelers must fully document their expenses, and the traveler's supervisor must review all travel expense reports submitted to them before considering approval. If the per diem is claimed for meal expenses, then original itemized receipts are not required for meal expenses. Note the following specific rules and steps for travel reporting and documentation:

- One Travel Expense Report Form per trip must be processed following the trip. An additional Travel Expense Report Form may optionally be processed prior to the trip when personal funds are used for common carrier transportation expenses and/or registration fees. The final Travel Expense Report Form must reflect any prepayments and reimbursements prior to the trip.
- Travel expenses must be filed within 30 calendar days after the trip has concluded. Exceptions to the 30-day rule require approval by the Provost, Vice President, or Dean.
- Mileage expenses for same day or incidental travel in personal vehicles must be submitted no less than quarterly on a Travel Expense Report Form accompanied by a Mileage Log. A Mileage Log must be maintained and submitted within 30 days to the traveler's supervisor for approval. The Mileage Log must accompany the Travel Expense Report Form for reimbursement. Mileage is calculated from the point of departure to the destination point. Commuting between home and primary work site will not be reimbursed by the university. Mileage is not reimbursable when traveling by University vehicle or courtesy car.
- All original itemized receipts (excluding credit card charges) must show proof of payment including the person who paid the charge and what form of payment was used. If an original itemized receipt is lost, it is the traveler's duty to contact the vendor and obtain a duplicate of the receipt.
- In the rare event that an original itemized receipt is not made available by the vendor, the traveler must contact their card-issuing bank to provide one. Reimbursement of a charge without a receipt will only be made if a memo including information on the type of expense, the date, the vendor, and an explanation of why the receipt was not issued is submitted along with the completed travel expense form.
- The amount due to the traveler will be substantiated by all personal credit card

itemized receipts.

- When no reimbursement is due a traveler because all the expenses were covered by an SU credit card a Travel Expense Report does not need to be submitted.
- All non-credit card international travel expense claims submitted by SU employees should be in U.S. dollars at the rate of exchange at the time of departure from the foreign country and must be indicated on the travel expense form. Link to Currency <https://www.bloomberg.com/markets/currencies> International residents may be paid in the currency of their country of origin.

I) MISCELLANEOUS

Rewards Programs

University travelers may accrue travel reward program “miles” for travel. If a traveler chooses to use frequent flyer miles in connection with University business, it is his/her responsibility to keep track of the accrual/usage for auditing purposes.