

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE 1 OF 12</i>		

PURPOSE

This section sets forth the privileges and responsibilities of administrators, faculty, staff, and students using University resources for business travel. The overall objectives are:

- to ensure all employees have a clear and consistent understanding of policies and procedures for business travel and entertainment;
- to provide business travelers with a reasonable level of service and comfort at the lowest possible cost; and finally,
- to maximize the University's ability to negotiate discounted rates with preferred suppliers and reduce travel expenses

SCOPE

This travel policy applies to all business travel and entertainment expenses incurred on the University's behalf and paid for with University funds.

POLICY

I. Travel Arrangements

- A. Travelers should make reservations as early as possible to take advantage of advance purchase discounts.

All air travel, lodging, car rental and rail travel reservations including en route changes, should be arranged through Travel and Transport, the University's preferred travel manager.

II. Domestic Air Travel

- A. Airline Class of Service

1. All domestic air travel must be in Coach class.
2. Employees are expected to use the lowest logical airfare available.
3. Business class is acceptable when it does NOT cost more than the lowest available Coach fares.
4. Employees may use Business class in the following instances:
 - a. employees with certain physical conditions/disabilities.
 - b. when Coach class is completely sold out and no alternate flights are available.
5. Employees may use First class in the following instances:
 - a. employees with certain physical conditions/disabilities.

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE</i> 2 <i>OF</i> 12		

- b. when Coach and Business class are completely sold out and no alternate flights are available.

B. Upgrades for Domestic Air Travel

- 1. An upgrade is allowed at the expense of the University if the ticket cost does NOT exceed lowest logical airfare/authorized class of service.
- 2. Upgrades that exceed the lowest logical airfare are allowed at the traveler's personal expense.

C. Airline Frequent Flyer Programs

Traveling employees may retain frequent flyer program benefits. However, participation in these programs must not influence flight selection that would result in incremental cost to the University beyond the lowest available airfare, as defined in this policy.

D. Lost or Excess Baggage

- 1. The ultimate responsibility for retrieving and compensating lost baggage lies with the airlines. The University will not reimburse travelers for personal items lost while traveling on business.
- 2. Employees will be reimbursed for excess baggage charges only in the following circumstances:
 - a. when traveling with heavy or bulky materials or equipment necessary for business.
 - b. the excess baggage consists of University records or property.
 - c. when traveling for more than ten (10) consecutive days on University business.

E. Denied Boarding Compensation

Airlines occasionally offer free tickets or cash allowances to compensate travelers for delays and inconveniences due to overbooking, flight cancellations, changes of equipment, etc. Travelers may volunteer for denied boarding compensation only if the delay in their trip will not result in any interruption of business or any additional costs to the University.

F. Unused/Voided Airline Tickets

When using Travel and Transport, the tracking and final disposition of unused and voided tickets will be coordinated through Travel and Transport. If purchasing tickets with any

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE</i> 3 <i>OF</i> 12		

travel agency other than Travel and Transport the steps below must be followed by the individual ticket holder.

1. Unused airline tickets or flight coupons must never be discarded or destroyed as these documents may have a cash value.
2. To expedite refunds, unused or partially used airline tickets must be returned immediately to the local travel agency office that issued the ticket.
3. Unused tickets must NOT be sent to the airlines.
4. Travelers must NOT include unused tickets with their expense reports.

G. Method of Payment

Use of a department Visa credit card is the preferred method of payment. Travel and Transport will only book business travel using a credit card as a method of payment.

III. International Travel

- A. For purposes of this policy, international travel covers all destinations outside the continental U.S., including Canada, Hawaii, and Alaska.
- B. **Airline Class of Service**
 1. Employees are expected to use the lowest logical airfare available.
 2. All international travel should be in Coach class.
 3. Business class is acceptable when it does NOT cost more than the lowest available Coach class.
 4. Employees may use Business and First class in the following instances:
 - a. Business class may be used when total flying time exceeds twelve (12) hours, excluding layover time at connecting point.
 - b. employees with certain physical conditions/disabilities.
 - c. when Coach class is completely sold out and no alternate flights are available.
- C. **Upgrades for International Air Travel**
 1. An upgrade is allowed at the expense of the University if the ticket cost does NOT exceed lowest logical airfare/authorized class of service.
 2. Upgrades that exceed the lowest logical airfare are allowed at the traveler's personal expense.

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE</i> 4 <i>OF</i> 12		

IV. Lodging

- A. Travelers are expected to use negotiated or preferred rates whenever possible.
- B. Travelers may accept room upgrades to suites or executive floor rooms if the upgrade is at no additional cost to the University.
- C. Travelers are responsible for canceling hotel rooms and must contact:
 - 1. Travel and Transport if the travel agency made the reservation
 - 2. The hotel if booking was made directly with the hotel.
- D. Travelers should request and record confirmation of the cancellation in case of billing disputes.
- E. Travelers will be held responsible and will not be reimbursed for "no-show" or cancellation charges unless there is sufficient proof that the billing is in error.
- F. Use of a department Visa credit card is the preferred method of payment.
- G. Original receipts are required for **all** lodging expense regardless of total cost.
- H. Many hotels have frequent guest programs that reward travelers with free accommodations in exchange for a given number of paid room nights at the hotel. Travelers may retain awards from such programs for personal use; however, participation in these programs must not influence hotel selection that would result in incremental cost beyond the preferred rate.

V. Rental Car

A. Rental Car Guidelines

- 1. Use of a department Visa credit card is the preferred method of payment
- 2. Travelers may rent a car to their destination when driving is more cost-effective than airline or rail travel.
- 3. Travelers may rent a car at their destination when: it is less expensive than other transportation modes such as taxis, airport limousines and airport shuttles.
- 4. Travelers, whenever possible, should use the University's preferred provider National Car Rental and use Travel and Transport to make a reservation. When picking up a rental car, travelers should check with the rental car agent for any promotional rates, last-minute specials or free upgrades.

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE</i> 5 <i>OF</i> 12		

5. At the time of rental, the car should be inspected and any damage found should be noted on the contract before the vehicle is accepted.
6. When renting cars for University business do not purchase any of the insurance coverage. The University has coverage see this policy, section VI subsection D item 1 for complete details.

B. Rental Car Upgrades

1. Travelers may book a class of service one-level higher:
 - a. when the upgrade is at no cost.
 - b. when transporting excess baggage.
 - c. for pre-approved medical reasons.

C. Rental Car Cancellation Procedures

1. Travelers are responsible for canceling rental car reservations and must contact:
 - a. Travel and Transport if the agency booked the rental
 - b. The rental car companies if the booking was made directly with them.

D. Returning Rental Cars

1. Every reasonable effort must be made to return the rental car:
 - a. with any damage reported
 - b. on time, to avoid additional hourly charges
 - c. with a full tank of gas to avoid excessive fueling fees

E. Rental Car Accidents

1. Should a rental car accident occur, travelers should immediately contact:
 - a. the rental car company
 - b. local authorities, as required
 - c. AON Risk Services - see section VI. subsection D item 4 for contact information

- F. Employees will not be reimbursed for traffic citations they receive while using a rental vehicle for University business.

VI. Other Transportation

A. Ground Transportation To and From Terminals

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE</i> 6 <i>OF</i> 12		

1. Employees traveling to the same location should share ground transportation to and from the airport whenever possible.
2. The most economical mode of transportation should be used to and from airports, bus and rail terminals. The following modes of transportation should be considered:
 - a. buses, subways, taxis
 - b. hotel and airport shuttle services
 - c. personal car
3. Private limousines or car services should be used only when valid business reasons preclude the use of more economical modes of transportation.

B. Using Your Personal Vehicle On University Business

1. Mileage for University business while traveling in your personal vehicle may be reimbursed at the current allowable IRS rate at the discretion of the department administrator. See the Accounting Services' Office website for the current mileage rate.
2. The mileage payment will be based on the beginning and ending odometer readings. Reasonable surface transportation costs incurred in connection with approved travel, such as parking and toll bridges, may be reimbursed.
3. If two or more persons travel in one private automobile, only the vehicle owner may claim travel expense reimbursement, and the reimbursable expenses will be limited to the lesser of:
 - a. mileage allowance for the automobile, or
 - b. the combined costs of the "in-lieu-of-airfare" rates for all persons traveling in the automobile.
4. Travelers will not be reimbursed for any repairs to their personal car even if these costs result from business travel.

C. Transportation In University Vehicles (see [University Policy Vehicle Safety 2.1.14](#))

D. Automotive Insurance On Personal, Rented, And University Vehicles

1. The University has an automobile insurance policy with Travelers Insurance Company/AON Risk Services, Inc. of Nebraska. The policy number is [810-9362A00A-TIL-07](#). An employee is insured under the auto policy while driving a University owned vehicle. The coverage responds to negligence or allegations of negligence that result in bodily injury and/or property damage in connection with University owned and rented vehicles.
2. The University's liability is also protected by the "hired & non-owned" coverage that responds to claims arising from employee use of employee owned or rental vehicles on University business. In addition, there is an "Employees as Insureds"

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE</i> 7 <i>OF</i> 12		

endorsement that provides excess coverage to employees using their personal vehicles on University business. The employee's personal automobile insurance policy is primary in any incident in which an employee is operating a personally owned vehicle on University business. The University does not provide any physical damage coverage for employee owned vehicles.

3. If an accident occurs on campus, contact Public Safety immediately. If the accident occurs off campus or out of the city contact the legal authority in that jurisdiction to file an accident report; i.e. city police, county sheriff or state patrol office.
4. Make your claim or accident report to the Creighton University Risk Management office at (402) 280-5833 between the hours of 8:00 am and 4:30 pm Monday through Friday. If you cannot reach a representative of the Risk Management Office you can call AON Risk Services at (402) 697-1400 or 1-800-729-1011. After regular business hours please dial 1-800-527-1242. After the tone leave your name and telephone number, including the area code. Press the # button to send the message and hang up. An AON representative will promptly return your call.

VII. Meals

A. Personal Meal Expenses

Personal meals are defined as meal expenses incurred by the traveler when dining on an out-of-town business trip. Travelers will be reimbursed for authorized and/or reasonable meal expenses with appropriate documentation.

B. Business Meal Expenses

Business meals are defined as meals with clients, prospects or associates during which a specific business discussion takes place. Employees will be reimbursed for authorized and/or reasonable business meal expenses with appropriate documentation. (See Section VIII.E.2 for description of appropriate documentation).

C. Business Meals With Other Employees

Employees will be reimbursed for business-related meals with other employees only in the following circumstances:

1. When a client is present **OR**
2. When, for confidentiality reasons, business must be conducted off University premises **OR**
3. When representing the University for testimonial, reward, recognition or other appropriate business purpose.

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE</i> 8 <i>OF</i> 12		

D. While on University business, employees may pay for other individual's meals. To receive reimbursement, the IRS requires the following information:

- o the meal receipt (Accounting Services' Policy [APPR06](#) for receipt requirements)
- o the number and names of persons in the group
- o the name of the organization your guest(s) represent
- o the reason you believe this to be a business expense

VIII. Entertainment

On occasion, it is appropriate to provide a meal or reasonably priced entertainment for business contacts. These must be related to business and your job responsibilities.

- A. **Definition:** To qualify as entertainment under IRS guidelines, entertainment expenses must be "directly related to" or "associated with" business. Substantial business discussion must take place immediately before, during or after the entertainment.
- B. All entertainment expenses, including local entertainment and entertainment while traveling, must be itemized on a TER.
- C. For government grants and per OMB Circular A21 section J, paragraphs 2 and 15 entertainment and alcoholic beverages are unallowable. Paragraph 2 "*Alcoholic beverages*. Costs of alcoholic beverages are unallowable." Paragraph 15 "*Entertainment costs*. Cost of entertainment, including amusements, diversion, and social activities and any costs directly associated with such costs (such as tickets to shows or sports events, meals, lodging, rentals, transportation, and gratuities) are unallowable."
- D. **Reimbursable Expenses:** Expenses for entertaining clients, industry representatives and sales representatives normally are reimbursable. These include expenses for your meal or entertainment. The following entertainment expenses are reimbursable:
- Concert and theater tickets
 - Sporting event tickets
 - Tennis court fees
 - Golf fees
 - Transportation to/from the event
 - Meals and beverages consumed at the event

E. Documentation and IRS Requirements

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE</i> 9 <i>OF</i> 12		

1. Accounting Services' Policy, section [APPR06](#), for receipt requirements for submission with the TER for any individual meal, entertainment, or miscellaneous expense.
2. In addition, for business meal and entertainment expenses, the following documentation is required by the IRS, and must be recorded on the TER:
 - Names of individuals attending, their titles and company name
 - Name and location where the meal/event took place
 - Exact amount and date of the expense
 - Specific business topic discussed
 - In the case of entertainment events, the specific time the business discussion took place, (i.e., before, during, or after the event)

IX. Payment Methods

A. Procurement Card (see [Purchasing Policy 6.2](#))

B. Personal Credit Card

1. Personal credit cards may be used in the absence of the procurement card listed above.

C. Cash Advances - Temporary

1. Travelers should not request cash advances to pay for business travel except in extraordinary circumstances.
2. Prior approval must be arranged with the area Vice President and sent to the Purchasing Card Administrator for credit card cash withdrawals. Approving the University credit cards for cash advances can take up to 60 days. Please plan accordingly
3. Cash advances will not be issued for employee relocation expenses or in the case of consultants, speakers or other individuals not on the University payroll. Under certain circumstances, travel advances may be issued to students.
4. A request for a non-credit card cash advance for meals only must be submitted on a [Travel Advance Form](#) attached to a University DPR. The request must include:
 - departure and return dates
 - destination
 - purpose of travel
 - name(s) of traveler(s)
 - details regarding the amount of the advance
 - copy of the conference brochure

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE</i> 10 <i>OF</i> 12		

5. Cash advances for meals are based on IRS "high - low" [per diem rates](#):
6. On the day travel begins or ends, there is an allowance of one-fourth the standard rate for every six (6) hours if business travel is less than a full day.
7. The request will be processed only when signed by the appropriate authority prior to being forwarded to the Accounting Services' Office. University cash advances will not be issued more than five (5) working days before the approved travel.
8. A TER must account for the amount of the University cash advance and should be submitted to the Accounting Services' Office within seven (7) working days of the traveler's return to campus. The University will include outstanding advances in the employee's earnings by a payroll adjustment 60 days after the travel advance check date. The University will not give an additional advance to any employee with an outstanding travel advance.

D. Cash Advances – Continuous

1. Continuous cash advances are a replenishable source of funds for employees to cover travel-related expenses, which are expected to be incurred in the course of University business.
2. Continuous cash advances may be provided to Admissions for recruiting, Alumni Relations for alumni functions and trips, University Relations for fundraising, Athletics for team travel, and Academic area team travel.
3. The area Vice President must approve requests for continuous cash advances.
4. The employee submits a TER and is reimbursed on periodic or per trip basis for all business-related cash expenses.
5. This advance will be confirmed each fiscal year by the Accounting Services' Office staff.
6. Upon termination of employment at the University, the employee must return the full amount of the continuous cash advance or it will be deducted from the last payroll check.
7. Note that all requests for reimbursement must be received by the Accounting Services' Office within 60 days of the date of the earliest expense for which reimbursement is requested.

X. Travel and Business Expense Report (TER)

- A. The TER is used to authorize reimbursement of travel expenses, to account for travel advances and other out-of-pocket business expenses, and to provide original documentation for incurred travel expenses. ([Accounting Services' Travel and Expense Form](#))

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE</i> 11 <i>OF</i> 12		

XI. Miscellaneous

A. Spouse/Companion Travel

The University will not reimburse travel and entertainment expenses incurred for or by a spouse or other individual accompanying an employee on business unless:

1. There is a bona fide business purpose for taking the spouse or other individual.
2. The spouse/companion is a University employee and registered or participating in the same conference or event.
3. The expense incurred would be reimbursable based upon the IRS definition of a reimbursable business expense.
4. Note: The spouse/companion may accompany an employee on a business trip **at the employee's expense.**

A. Telephone

1. Many hotels assess costly surcharges for long-distance and/or local calls from their rooms. These expensive surcharges can be avoided by using a pay phone or cellular phone.
2. Telephone expenditures are reimbursable when required for business purposes. Calls for home emergencies will be reimbursed.

B. **Gratuities:** A reasonable tip is an authorized expense. Excessive tipping is considered a personal expense and will not be reimbursed. Please consult the tipping guide linked below for accepted practices. <http://www.itipping.com/>

C. **Other Reimbursable Expenses:** Travelers will be reimbursed for most reasonable business related expenses. Some examples are: faxes, parking, tolls, overnight delivery/postage.

D. **Non-reimbursable Miscellaneous Expenses:** Expenditures for items which benefit an employee personally are not reimbursable, i.e., airport lounge clubs, travel insurance, magazines, gifts, haircuts, beauty services and /or in-room movies or video games.

RESPONSIBILITIES

All business-related travel arrangements paid for or reimbursed by the University must be made within the ethical and legal limits as defined by industry, state and federal regulations. The University will not assume any responsibility for commitments made outside those ethical and legal boundaries.

ADMINISTRATION AND INTERPRETATIONS

Policies and Standards

<i>SECTION:</i> Purchasing	<i>NO.</i> 6.5		
<i>CHAPTER:</i> Practices	<i>ISSUED:</i> 9/97	<i>REV. A</i> 7/07	<i>REV. B</i> 11/07
<i>POLICY:</i> Travel Policy	<i>PAGE</i> 12	<i>OF</i> 12	

This policy shall be administered by Purchasing. Any questions, concerns or suggestions regarding this travel policy may be directed either to the Director of Purchasing or Accounting Services.

AMENDMENT/TERMINATION OF THIS POLICY

The University reserves the right to modify, amend or terminate this policy at any time.

EXCEPTIONS

A department may request an exemption by contacting the Director of Purchasing or Accounting Services.

VIOLATIONS/ENFORCEMENT

Any known violations of this policy should be reported to the University's Purchasing Department.