

SAINT JOSEPH'S UNIVERSITY
TRAVEL POLICY
Effective September 1, 2005

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I. PURPOSE

The purpose of the University Travel Policy is to set forth the procedures for University-related travel and reimbursement for travel expenses.

II. GENERAL POLICY STATEMENT

Individuals will be reimbursed for expenditures incurred on behalf of or during the course of conducting University business as outlined in the following policy. Expenses should be within reasonable limits and commensurate with the nature of the University assignment and capacity in which the employee represents the University.

Employees are expected to exercise common sense and good judgment while incurring expenses on behalf of the University.

It is the duty of every traveler and their respective Department Head to ask the questions:

- Is the expense necessary?
- Can the objective of this trip be accomplished by less costly means?

III. APPLICABILITY

These instructions apply to all employees of the University and any non-University individuals traveling for the benefit of the University. The authorization for non-employee travel on University business must include information which establishes the relationship between the travel and the duties being performed for the University.

IV. RESPONSIBILITY

It is the responsibility of the traveler and the respective Director, Department Head, Dean, Vice President or the President to ensure compliance with the University travel policies and procedures.

V. TRAVEL ARRANGEMENTS

All employees of the University are required to use the University Travel Office and/or VTS Travel, Inc., the University's official agency for all business-related transportation and lodging.

When attending a conference or meeting that is arranged by a national group or association, the traveler should request that the University Travel Office compare the special rate offered by the conference with published fares to ensure that optimal arrangements are obtained.

Airline tickets issued for University business travel will be paid by the University's central billing account and then charged to the traveler's budget electronically. At the time of trip approval, the traveler **must provide the appropriate budget number. The traveler must insure that there are adequate funds available in the Banner travel accounts. Sufficient funding must be available before any travel arrangements will be booked.**

All final travel arrangements must be made through the Travel Office.

Contact Information:

Darlene Hutchinson, Travel Manager
219 Merion Place
Phone: 610-660-1316
Fax: 610-660-1319
Cell: 484-557-2067 (After Hour Emergency Use)
Email: travel@sju.edu, dhutchin@sju.edu

VTS Travel
860 Wyckoff Avenue
Mahwah, NJ 07430
Phone: 800-383-1403
After Hours: 800-297-2269

For Group Reservations or Off-Site Meeting and Conference Planning:
Call the University Travel Office
610-660-1316

After Hours Emergency Line
800-297-2269

Leisure / Vacation Packages / Cruises
Robin Marcus 888-456-9195
Janice Cassan 800-669-0406

VI. TRAVEL ADVANCES

Travel advances will be issued for a specific University business purpose to cover expected out-of-pocket expenses and should not be in excess of estimated expenses not covered by the use of a corporate credit card. Such expenses would typically include tips, taxi fares, bridge and road tolls, telephone calls, or meals in restaurants not accepting credit cards. Travel advances should be reasonable and require the Department Head's approval. Travel advances can be requested through submission of the University's Request for Funds form. (*Add link to form on the web.*) An advance is not available if travel is performed at no cost to the University or by a non-employee. Except for conference registration fees, an advance will not be issued more than one week before the start of travel.

Upon obtaining a travel advance, the employee assumes personal responsibility for the funds obtained.

Travel advances should be settled with the University no more than 10 business days after the completion of the trip. A cash advance will not be granted for a new trip until there has been full settlement with the University for any earlier advance. The employee's Department Head will be notified if the employee fails to comply.

VII. CREDIT CARDS

Travel/Entertainment Credit Card

The University will make a University credit card application form available to employees who travel frequently, based on written, authorized approval by a Vice President, or the President. Applications are available in the University Travel Office.

University credit card billings are the responsibility of and will be sent to and paid by the employee. **These cards must be used exclusively for University business.** Employees holding cards are required to pay these bills in a timely fashion. Misuse of the card will result in the collection of the card by the Office of Financial Affairs.

VIII. EXPENSES: DOCUMENTATION, REPORTING AND APPROVAL

Documentation

In order to be reimbursed, expenses must be documented in adequate detail. **All original receipts are required for expenditures in excess of \$25.00. Copies of credit card monthly statements are not considered the original receipt.**

Reporting

Expenses must be submitted for reimbursement within 10 business days after the completion of the trip. **Failure to comply with this policy may result in expenses not being reimbursed.** ([Add link to Business Expense Reimbursement Form.](#))

Normally, the University **will not reimburse** an employee for the cost to entertain a fellow University employee. There may be circumstances when a legitimate University expense will be paid on behalf of another employee (at a meeting or when traveling together) or several employees. The employee bearing and reporting the expense should be the senior member of the group. The expense report must provide the names of the other employees covered for this expense as well as the business purpose.

Approval

Prior to reimbursement, all travel expenses must be approved by the employee's Department Head in accordance with delegated authorization limits. The approver's signature attests to the following:

- All expenses are reasonable and related to a valid University business purpose;
- The expenses are explained in adequate detail and properly supported by receipts;
- The allocated budget numbers have adequate funds to cover the expenses;
- The report is arithmetically correct (the Department Head may use his/her support staff to check; if so, have that person initial the box indicated as "Audited by").

All Vice Presidents are to submit their expense reports for review and approval to the President or his designee.

IX. PART BUSINESS/PART PERSONAL TRAVEL

Employees must notify their Department Head before leaving on a trip involving both University and personal travel.

It is the employee's responsibility to obtain appropriate documentation differentiating personal expense from University expense. The University will only reimburse the employee for the University business portion and the normal amounts as if the trip had been taken without a personal portion.

X. ENTERTAINMENT EXPENSES

Expenses incurred to entertain donors, alumni, friends, or business associates are paid by the University when the time, place, business purpose, names and the business relationship are noted on the Business Expense Reimbursement Form and it is signed by the proper approving authority.

The amount spent should be consistent with good business practice and should be kept within limits that will not place either party in the other's debt.

XI. MISCELLANEOUS EXPENSES

Miscellaneous expenses when traveling on University business which are **reasonable and necessary** will be reimbursed. Such costs include, but are not limited to:

- taxis and other public transportation
- tolls and parking fees
- the cost of currency conversion
- passports, visas, medical fees, postage (if need to acquire for business travel)
- laundry on extended business trips
- business telephone calls
- personal calls home of reasonable length

The following **will not** be reimbursed:

- calls from airfones and railfones
- in-room movies, except if provided for group
- personal expenses such as hygiene items, magazines, etc., except if luggage is lost toiletries will be covered
- costs of additional travel insurance
- costs of alcoholic beverages (unless they are related to University-sponsored entertainment)
- Parking tickets and/or fines for traffic violations
- Use of Spa at the hotel
- Interest and late fees on the corporate credit card
- Spouse's travel

XII. TRAVEL EXPENSES PAID BY OUTSIDE ORGANIZATION

Under certain circumstances, an outside organization may reimburse a University employee directly for travel expenses or make direct payment to a travel vendor

on behalf of the employee. In such instances, an employee may accept such services or reimbursement, provided the following conditions apply:

- The University is not used as a source of travel funds, either in the form of a travel advance or reimbursement.
- The non-University source does not charge the University (or a University contract or grant) for the travel costs.

If an outside organization pays travel expenses only for a specific segment of the trip, the employee should adhere to the reimbursement guidelines set forth in this policy.

XIII. REIMBURSABLE EXPENSES POLICY

A. Air and Rail Travel

Air and Rail Fare: The policy on air travel is to fly coach by the lowest applicable fare routing. Interim stops, change of planes or layovers less than two hours should be considered when the potential savings is \$100.00 or more.

Business class travel is permitted if all of the following criteria are met:

1. The travelers are required to conduct University Business upon arrival and without time to rest from the extended trip;
2. It is an intercontinental trip of 20 hours or longer on-way;
3. It is not feasible to upgrade using frequent flyer miles; and
4. Travel is approved by the University Travel Office, which is responsible for ensuring that these criteria have been met; any exceptions require the prior written approval of the Vice President for Financial Affairs.

First class travel is only permitted if business class travel is not available and the above-listed criteria are met.

Vice Presidents and Department Heads will receive a quarterly lost savings report identifying those who refused the lowest fares. This report will provide the amount of lost savings as well as the reason for refusing the flight. (Lowest fare is defined as the lowest reasonable fare with no more than one connection that will get you to and from your destination within a two hour window of your preferred times.)

Advanced Ticketing: Reservations must be requested as far in advance as possible to aid the University in taking advantage of discounted air fares having advance purchase requirements or lesser fares that may become available through wait list procedures.

Travel Incentive Programs: Airlines often offer awards (i.e., frequent flyer bonuses to encourage use of a specific carrier). Any award or bonus given by an

airline to you is yours. The University assumes you will organize your trip for the sole benefit of the University with economy of both time and money in mind. It is considered improper to route oneself with a carrier for the purpose of obtaining frequent flyer mileage, when flights on another carrier would have been less expensive. Bonuses in the form of upgrades may not be applied to University business travel where they do not permit the use of the discount fares. The maintenance of a frequent flyer account is between the carrier and the individual.

Use of Rental or Leased Aircraft: Any University employee desiring to use, rent, charter or fly an aircraft on University business must obtain written approval from the President. The written approval must be attached to the payment document before payment can be made. Persons using this method of travel must have on file at the Travel Office a current copy of the aircraft insurance policy.

B. Ground Transportation: Appropriate ground transportation generally should be selected by evaluating the cost efficiency of alternatives. Usually the lowest cost alternative, in order of preference, is:

- University van
- personal auto
- taxi
- rental car
- private car service

A traveler should evaluate the cost of mileage, parking, tolls, etc., and select the lowest cost alternative.

In order to drive a University owned or leased vehicle, you must have successfully completed the University's safe driver training course and be placed on the safe drivers list. This list is maintained in the Department of Public Safety and will be made available to all Department Heads upon request. Additionally, you must provide the Department of Facilities Management (610-660-3000) with a copy of your driver's license at least 10 business days before you drive a University vehicle on SJU business. It is assumed that University drivers have valid driver's licenses with clean driving records.

To sign up for training, contact the Department of Public Safety (610-660-1199). At that time your driving record will be checked; you will sign an agreement to good driving conduct; and then be trained in safe and defensive driving techniques. If you are not on the list you may not drive a University vehicle on SJU business."

C. Use of Privately-Owned Automobile: A privately-owned vehicle may be used when the Department Head judges the use of such vehicle to be of benefit to the University or when the traveler elects for personal preference. Employees will

be reimbursed for mileage in excess of the normal commute to and from the employee's normal work place. **The reimbursement rate is the rate authorized by the Internal Revenue Service for federal income tax purposes.**

When travelers are sharing the use of a privately owned vehicle, reimbursement is allowable only once. When the traveler elects for personal preference to use a privately-owned vehicle, reimbursement for mileage and costs may not exceed the amount charged for the most commonly used public carrier (for example, air fare) plus applicable ground transportation expense to the authorized destination. Lodging, meals and miscellaneous allowance will be allowed only for the time that would have been required to make the trip by the most commonly used public carrier.

D. Use of Rental Car: A rental car, for either local or out-of-town transportation, when the type and size is approved, should be secured through the University Travel Office.

- Use of corporate identification numbers will ensure proper rates and discounts. (i.e. Avis, Hertz, Enterprise or National,)
- Locally Kulp Rental Car and Avis offer discounted rates and will deliver the car to campus at no additional charge.
- Collision damage and personal injury fees should be waived when on University business.
- Charges for rental cars must be charged to the traveler's corporate credit card. Reimbursement will be made through the Business Expense Reimbursement Form.
- Receipts from the rental agency must be provided. Copies of the credit card charge alone will not be sufficient for reimbursement. The original rental agreement must be attached for reimbursement.
- Gas expenses will be reimbursed with proper documentation. When emergency service is required, the cost of service should be charged to your corporate credit card. Detailed receipts must be obtained. If the charges are estimated to be over \$100.00, the traveler should obtain prior permission from your Department Head for repair information

XIV. REPORTING ACCIDENTS

If an employee is involved in an accident with either their personal car while on University business (not normal commute) or a rental car, the employee must immediately notify the Department of Facilities Management (610-660-3000). Prior to renting or leasing a car or driving on University business, please obtain an accident report form from Department of Facilities Management.

XV. INSURANCE

When renting a car on University business in the United States, the renter should **decline** the additional insurances offered by the rental company. If you have questions on insurance or rental car coverage, please check with the University Travel Office prior to your planned trip. Additional insurances purchased will not be reimbursed.

XVI. HOTEL ACCOMMODATIONS

All hotel reservations must be made through the University Travel Office or VTS Travel. Your choice of hotels should be the lowest room rate of the following, in order of preference:

- Housing bureau for convention or meeting
- University corporate rate hotel
- VTS Travel negotiated hotel rate
- Personal choice

Many times a meeting is convened in a hotel and as part of the meeting arrangements the hotel is included or negotiated at a discount rate. This is an acceptable alternative. One should compare the rate obtained with the above to ensure the lowest cost. The University Travel Office should be made aware of least cost availability. All arrangements for off-site conferences and meetings hosted by the University should be coordinated through the travel office.

Actual cost of reasonable accommodations will be reimbursed with proper documentation; however, costs in excess of the usual and customary rate for the locale will require suitable justification on the Business Expense Reimbursement Form. The original copy of the hotel bill (folio) is required for reimbursement, including those hotels charged to your corporate credit card. The detail of the hotel charges should be attached to your Business Expense Reimbursement Form.

Area Hotels

The following hotels are located near Saint Joseph's University and may have arrangements for discounted rates for special events.

Hilton and Homewood Suites
4200 City Line Avenue
Philadelphia, PA 19131
215-879-4000

Holiday Inn City Line
4100 Presidential Blvd
Philadelphia, PA 19131
215-477-0200

Marriott West
111 Crawford Avenue
Conshohocken, PA 19428
610-941-5600

Sheraton Philadelphia City
17th and Race Streets
Philadelphia, PA 19103
215-448-2000

XVII. GROUP TRAVEL

All group travel requests must be directed to the University Travel Office. Substantial savings in airline and hotel costs are available when arranging group travel for as few as ten people. In order to ensure these savings are captured, all meetings of ten or more persons should be registered in advance with the University Travel Office

Rental vans and charter buses are also available. Contact the University Travel Office for any special requests. All charter bus reservations must be made through the University Travel Office. Bus bids are renewed annually and each vendor's certificate of insurance is on file with the Office of Financial Affairs. Use of a vendor not approved by the Office of Financial Affairs could result in an insurance lapse or reimbursement problem. No vendors other than the approved bus vendors will be reimbursable.

XVIII. MEALS

Personal Travel Meals

An employee traveling on business within the United States will receive the following per diem:

	Per Diem
Breakfast	\$10
Lunch	\$12
Dinner	\$26
Incidental	\$ 3

A meal is not covered by the per diem if furnished as part of transportation cost, e.g. on an airplane, as part of a conference registration fee, or otherwise provided at no cost to the traveler.

This per diem is based upon the IRS' highest standard meal allowance and is subject to change at the beginning of the fiscal year. An employee must complete the Business Expense Reimbursement Form to request reimbursement for the per diem amount. With the use of a per diem, travel meal receipts are not required and, therefore, should not be submitted with an employee's expense report. This per diem does not apply to international travel meals.

Employees traveling internationally will be reimbursed for usual and customary travel meal expenses for that country. All original receipts are required for expenditures in excess of \$25.00. Copies of credit card monthly statements are not considered the original receipts.

See separate Meals & Hospitality policy for additional information. Any exceptions to the Meals & Hospitality policy associated with international or group travel require approval of a Vice President.

XIX. REGISTRATION FEES

Conference or association meeting registration fees are reimbursable along with other travel expenses. An original receipt or application is required for any fees exceeding \$25.00.

XX. LOCAL TRANSPORTATION AND PARKING INFORMATION

The following companies are located near Saint Josephs University and may have discounts or special billing arrangements available to Saint Joseph's University travelers:

Maxwell Cab: 610-896-5100

Trinity /Premier Limo (local car service) and van and car service to all NYC airport: 610-586-6005

King Limousine (Local and National) Car Service:
800-245-5460

For bus charters please call the University Travel Office.

For information on transportation to the Philadelphia Airport

Taxis – Zone 5: \$20 flat rate to Center City Philadelphia

Shuttle Van / Limousine – Zone 7: Information is available at the Centralized Ground Transportation Counters in all baggage claims or by calling 215-937-6958.

XXI. TRAVELER'S PROFILE

All travelers should complete a profile listing all relevant business and/or personal information. (Airlines often require home phone numbers to notify you in the event of delays or cancellations). Profile forms are available in the Travel Office.

XXII. DOCUMENT DELIVERY

E-tickets will be emailed to your office. If you have a paper ticket, airline or rail, you can pick them up during normal business hours at the Cashier's Desk located in the Financial Affairs office at 219 Merion Place.

You will received en email of your itinerary at the time of booking. Please check this itinerary immediately upon receipt. Please verify dates, times and cities for accuracy. If something is incorrect please call the travel office immediately.

Changes en route: If it is necessary during your trip to change your itinerary, please make every effort to contact VTS Travel. If it is after business hours and it is truly an emergency change you may call VTS Travel at 800-297-2269. Identify yourself as a Saint Joseph's University traveler and the hotline will be able to re-route and perhaps help re-ticket in an emergency situation only.

If that is not possible, contact the airline. If reissuing your ticket is required, you should go to the airline counter at the airport. They will take your present ticket and apply its value toward the new ticket. If no additional payment is required, your ticket will be an even exchange. If there is a refund due, the airline will send the refund to the University. If an additional collection is due, charge this amount to your corporate credit card. Turn in any receipts with your Business Expense Reimbursement Form. Save your original ticket and the receipt from any newly purchased or incremental fees from the airline.

Problems and Emergencies: Try to document any problems encountered with names, dates and solution to the problem. Advise the University Travel Office on your return so that the office can follow up with appropriate correspondence. Please keep all original receipts and boarding passes. Individuals are responsible for their frequent flyer program miles. If an airline fails to credit you for a flight, mail a copy of the boarding pass from that flight to the address on your frequent traveler statement.

Seat Assignments: Are requested at the time of reservation per each airline's policy. All efforts will be made to secure the seat type you have requested. If your request cannot be honored at the time of ticketing, you may arrive at the airport early and request your preference- it can usually be accommodated at the airport. Very limited seating is now available for pre booking as the preferred seats are saved for mileage plus or gold priority flyers. Please make the agents aware of any special needs you have well in advance. You can ensure the accommodation of your special needs by having an updated profile in the system.

Special Arrangements: If you require special meals, wheelchair assistance, or any special arrangements please advise the University Travel Office at the time of booking your arrangements. For example, several hotels and car rental companies

make non-smoking accommodations available. Please note those on special diets: you may want to pack a snack or lunch as many flights are no longer serving meals and those in airports can be expensive. Please check your itinerary before traveling to see if a meal is being served. Minimum 48 hours prior to departure is required for all special meal requests to airlines.

Lost Luggage: Do not leave the airport until you have filled out the lost luggage forms with the carrier. Make sure you have your baggage claim checks as confirmation. Most carriers reimburse up to a set dollar amount unless actual receipts can be produced for those items lost. Be sure to note the name of the airline representative helping you with the form. Obtain a local number for calling the airport about your luggage, if lost. This cannot be done after the trip - if your luggage is lost or damaged report it to the airlines immediately.

Flight Delays/Cancellations: If you have a connecting flight and the first flight has been delayed, check with the airline to be sure you will have time to make the connection; otherwise, you may be stranded in the connecting city. Each airline has a policy for reimbursement and accommodation compensation on canceled flights. You must check with them at the counter. Please document with names, dates and times.

If you have unused airline or train tickets, return them to the University Travel Office to determine if a refund is applicable.

If your tickets have been lost or stolen, report them immediately to the University Travel Office, or if en route to the airline and make sure a "lost ticket application" is filled out in your presence and you get a copy of that document. A new ticket must be purchased. However, a Lost Ticket Application can be filed (the fee ranges from \$50 to \$150) to retrieve the value of the ticket.

Check in at either the counter or the gate at least 2 hours prior to the departure of your domestic flight. Even if you have boarding passes, the airline will release your seats to board standby passengers if you have not checked in at least 20 minutes prior to the scheduled flight departure time.

Every effort will be made by the University Travel Office to advise you of weather, natural disaster or any other crisis which may occur during your trip. Therefore, it is important that the travel department and agency have all your contact numbers to advise you on up-to-the-minute changes.