

PLU TRAVEL POLICY - SUMMARY

This summary is based on PLU's Travel and Business Expense Policy, which is available on the Business Office's web site. All employees are responsible for knowing the full Travel and Business Expense Policy. The purpose is to help the university effectively monitor and control costs, and to adequately comply with the accountable plan rules set forth by the IRS in Publication 463. *(Check with your area and/or division for more specific or additional guidelines.)*

PRIOR TO TRAVEL:

***TRAVEL ADVANCES:** Apply only when appropriate for the trip.

- Requests must be submitted on a Pre-Travel Authorization Form to the Business Office by 5 p.m. on Monday or the first business day of the week in order for payment to be available on the last business day of the week.
- Maximum travel advance is \$125 per day.

***AIRFARE:** PLU encourages travelers to book airfare using a PLU P-card.

- Airfare reimbursement is for coach class. If a different fare class is booked, PLU will reimburse the lower cost fare.
- Proof of payment must accompany the Travel Advance and include: passenger name(s), amount, and last 4 digits of credit card number. A credit card statement with the amount circled, along with the itinerary will also suffice.
- If due, airfare reimbursements will be deposited via ACH within two weeks after receipt in the Business Office.

***REGISTRATION:** PLU encourages travelers to book registration using a PLU P-card.

- Registration fees paid personally will not be reimbursed prior to your trip.

GROUND TRANSPORTATION:

- Employees are encouraged to use campus rental vehicles when available, or other rental vehicles as appropriate.
- When using a personal vehicle, PLU pays \$.45 per mile for approved business mileage.
- If traveling via personal vehicle in lieu of air transportation, PLU will reimburse the lesser amount.
- Fuel cost reimbursement is for rental vehicles only (off-campus and PLU rentals).

LODGING:

- Lodging expenses will be reimbursed after returning from the trip.
- Expenses are limited to a single room rate unless sharing a room with another university member.
- Personal charges must be deducted from submitted receipts prior to submitting a Travel Expense Voucher.
- If any personal charges are inadvertently placed on a P-card, contact the Business Office prior to submitting the Travel Expense Voucher.

WHILE TRAVELING:

RECEIPTS: **ALL** itemized receipts are required. If paid by other than cash, receipt should include the last 4 digits of credit card number, or provide a copy of the front and back of the bank endorsed personal check.

- When reasonable attempts to obtain a receipt fail, submit a Lost or Unavailable Receipt form.
- **TRAVELING ABROAD:** Note exchange rate and conversion to U.S. dollars on receipts; provide business purpose and names of others whose expenses are covered on the receipt.

MEALS:

- Meals may be charged to PLU when an employee travels out of town on PLU business.
- Cost of meals must be commensurate with the normal daily eating practices.
- Tips should be reasonable and follow the customary 15% guideline.

*ALCOHOLIC BEVERAGES:

- While all alcohol purchases charged to PLU are subject to area approval, the limit is one moderately priced alcoholic beverage purchased with a meal.

PERSONAL ITEMS/LAUNDRY:

- Reimbursement will not be allowed for personal expenses.
- Travel for longer than 7 days: if necessary, laundry expenses may be reimbursed.

SPOUSAL/PARTNER EXPENSES:

- Expenses for spouse/partner should **not** be charged on a PLU P-card; nor will they be reimbursed.

AFTER TRAVEL:

Travel Expense Vouchers must be submitted to the Business Office within 20 days following return date.

- Complete all sections on the Travel Expense Voucher as necessary and include appropriate signatures.

AIRFARE:

- If you paid airfare on a personal credit card and have **not** received prior reimbursement, submit for reimbursement on the Travel Expense Voucher. (See proof of payment requirements on page 1 under AIRFARE – PRIOR TO TRAVEL)
- Airfare reimbursed previously must be accounted for in the Travel Advance section of the Travel Expense Voucher.

FUEL and AUTO MILEAGE:

- Account for all rental vehicle (off-campus or PLU vehicle rentals) expenses on the Travel Expense Voucher.
- Include the reservation confirmation information for all rental vehicles (off-campus and PLU vehicle rentals).

RECEIPTS:

- Submit original receipts with the Travel Expense Voucher, including original PLU P-card receipts. Maintain copies of P-Card receipts with the P-card statement in the cardholder's area.

If a prior Travel Expense Voucher is past due, further travel may not be approved. All travel advances must be accounted for on the expense voucher.

***The following information pertains to the Provost/Academic area:**

Corrections to a pre-travel or travel voucher are the responsibility of the employee not the Administrative Assistant. Each division/school has their own practice regarding travel advances, registration and airfare reimbursement. Please check with your administrative assistant for the appropriate procedure in your area.

APPROVAL PROCESS and TRAVEL ADVANCES: Submit a "Pre-travel Authorization" form at least **two** weeks prior to your trip for approval.

AIRFARE: Requests for airfare reimbursement or travel advances will require submission of the pre-travel form at least **one month** prior to your trip. Requests received during the same week of departure will not be reimbursed in advance.

ALCOHOLIC BEVERAGES: All purchases require Provost approval; limit is one alcoholic beverage per meal (typically at dinner).