

Policy Statement

Beloit College pays for the reasonable documented expenses actually incurred by staff and faculty traveling on official administrative College business. All official travel shall be properly authorized in advance, reported, and reimbursed in accordance with the guidelines set forth by the Office of the Vice President for Finance and Planning. Travel guidelines apply to all sources of funding, including grants, unless the grant agency contractually requires special or alternative travel rules.

(For faculty PPDC travel, please see Professional and Program Development Guidelines.)

Air Travel

Employees are expected to book the lowest-priced, coach-class airfare available. The College will not reimburse business-class and first-class domestic travel. For international travel, premium class in coach airfare is allowed. Reservations should be made after considering the following guidelines:

- **Advance Booking:** Airfare tickets should be booked at least 15 days in advance whenever possible to help secure the best possible pricing.
- **Frequent Flyer Miles:** Employees are encouraged to use their frequent flyer miles for College business purposes. The College will reimburse the employee the lesser of the flight's normal economy ticket cost or \$200 for flights purchased with personal frequent flyer miles.
- **Less Traveled Airports:** Employees should obtain price quotes for departures and arrivals at less popular airports since they generally offer lower fares (e.g., fly from Akron-Canton or Columbus instead of Cleveland; fly to Oakland instead of San Francisco, Orange County instead of Los Angeles, etc.).
- **Saturday Stay:** When College travel includes air transportation during the week, employees may extend their stay through a Saturday night if the air transportation savings is greater than the cost of an additional night's lodging.
- **Split Tickets:** The process of obtaining split tickets is increasingly complex; please contact the Office of the Vice President for Finance & Planning at extension 2250 for assistance and clarification on this process. When a trip does not include a Saturday night stay, it may be in the College's best interests to purchase two one-way tickets on different airlines. For example, instead of buying one \$800 round trip ticket which does not include a Saturday night stay, the College would purchase two \$250 tickets on different airlines.

- **Internet Travel Sites:** Employees are encouraged to search for the best ticket prices available through internet travel sites such as [Orbitz](#), [Travelocity](#), [Expedia](#), [Priceline](#), etc. Employees should be willing to choose flights which have at least one connection if such flights are less expensive than a direct flight. Employees should use the information gained from these sites to search for flights on identified airlines (e.g. if the best price offered by Orbitz is a flight via Northwest, visit the website of Northwest airlines and search for the flight specified by Orbitz). The College will reimburse associated fees for tickets purchased on the internet (e.g. handling fees, booking fees, delivery fees). Receipts for tickets secured through the internet must meet the Electronic Receipt Guidelines. Caution: Purchasing tickets through internet travel sites may result in highly restrictive refunding and ticket change procedures.
- **Transportation to/from Departing Airport:** The College does not provide airport shuttles for employees; this service is reserved for official guests of the College. Airport transportation is the responsibility of the traveler. The College will reimburse mileage at \$.42 per mile. If the cost to the College would be less to use round-trip cab service rather than leave a car in airport parking for the duration of the trip, the traveler may exercise this option and seek reimbursement.
- **Transportation to/from Arriving Airport:** The College will reimburse one cab ride from the airport to the hotel and one return ride to the airport.
- **Passport Fees:** When international travel is required for College business, the College will reimburse employees for expenses involved in obtaining or renewing a U.S. passport (<http://www.usps.com/passport/>). Allow 8 weeks for government processing.

Meals

- **To qualify** as a non-taxable business meal, the business trip must last "longer than a regular working day (but not necessarily 24 hours) and require time off to sleep (not just to rest) before returning home." This is called the overnight-sleep test. Breakfasts will be reimbursable without taxation on the first day of an overnight business trip **only** if the trip **begins** earlier than 6:30 a.m.
 - Exceptions to overnight-sleep test
 - One-day business trips which cause the participant(s) to be away from their residence at "normal" evening meal time should be reimbursed for any actual meal expenses incurred on the way home. For a day business trip to qualify for evening meal reimbursement, the participant(s) must be at least one (1) hour from their home **or** College, whichever is closer, at the end of the normal work day. Lunches do not qualify for non-taxable reimbursement on one-day business trips.
 - One-day business trips to attend seminars or educational presentations that last over the lunch hour may have lunch reimbursed.
- **Meal Expense**, even if ordinary and necessary, is not allowable by IRS unless you can establish that the "expense is directly related to the active conduct of his trade or business. Meals with campus colleagues during the business day to discuss topics where other times and places are available for this activity do not qualify for non-taxable reimbursement. Taking a prospective employee or donor or even a current student out to lunch as part of a recruitment, cultivation or retention effort, for example, **will qualify** for reimbursement *if properly documented*. If a meal expense directly precedes or follows a substantial and bona fide business discussion (including a business meeting at a convention), then it must be established that the expense is associated with the **active** conduct of a trade or business."
- **Daily Allowance**: Unless entertaining for a legitimate business purpose, employees should try to limit daily meal expenses to \$50 in large urban areas and \$30 in non-urban areas.
- **Tip Guidelines**: Typically, the College will reimburse tips up to 15% of the meal value. If the service is exceptional, reimbursement of tips up to 20% is permitted.
- **Local Meals**: Beloit College encourages the patronage of local restaurants, in addition to utilizing campus facilities, for business or business-entertainment purposes.

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Business Entertaining

- **Local Entertainment:** Beloit College encourages the patronage of local restaurants, in addition to utilizing campus facilities, for business or business-entertainment purposes.
- **Tip Guidelines:** Typically, the College will reimburse tips up to 15% of the meal value. If the service is exceptional, reimbursement of tips up to 20% is permitted.
- **Alcohol Guidelines:** When entertaining for a legitimate business purpose, the College will reimburse for reasonable alcohol consumption based on guidelines determined by each Vice President; please contact the office of the appropriate Vice President for details.

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Telephone

- **Cell Phone/Electronic Device Allowance:** Beloit College may provide an allowance for employees whose job duties require the frequent access to cellular or electronic devices. Please see The Cellular Phone/Electronic Device Allowance Guidelines.

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Vehicle Rental

For local and regional travel, employees are expected to use a privately owned vehicle and receive mileage reimbursement. When business travel requires a rental vehicle, employees are expected to book the lowest-priced vehicle rental available.

- **Internet Travel Sites:** Employees are encouraged to search for the best non-local rental rates available through internet travel sites such as [Orbitz](#), [Travelocity](#), [Expedia](#), [Priceline](#), etc. Receipts for rental vehicles secured through the internet must meet the Electronic Receipt Guidelines. Caution: Reserving vehicles through internet travel sites may result in highly restrictive refunding or change procedures.
- **Car Class:** Unless traveling with three or more people, employees should rent compact or smaller vehicles. Exceptions must be approved in advance by the appropriate Vice President.
- **Insurance Coverage:** Employees should decline/waive the insurance coverage option on rental car agreements, and sign the rental agreement as "Beloit College, by: [employee name]" to enable the College's insurance policy to provide coverage. The College will not reimburse employees for unnecessary insurance expenses. If the rental agency specifically requires a certificate of insurance, contact the Business Services Office at extension 2353. A certificate of insurance will typically take 1-3 days.
- **Refueling Options:** Employees should select the option that requires the employee to fill the gas tank just prior to returning the car to the rental agency and submit the receipt for reimbursement.
- **Parking:** The College will not reimburse for valet parking if a self-park option is available.
- **Car Rental:** Use of College owned vehicles must be arranged through the College's Security Department.

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Non-Reimbursable Expenses

The following list of non-reimbursable expenses is meant to be representative, not comprehensive. Exceptions can only be granted by the appropriate Senior Staff member.

- **Wisconsin Sales Tax**
- Airline/car rental upgrades
- Airline Club or social club membership dues
- Babysitting or childcare costs
- Car repairs/routine maintenance or locksmith charges
- Clothing, luggage, briefcases
- Credit card delinquency fees/finance charges/annual fees
- Duplicate insurance on rental vehicles
- Expenses for travel companions/family
- Health club facilities, saunas, massage
- Helicopter services for airport transfers
- Kennel fees and pet care for pets while on travel status
- Loss/theft of cash
- Loss/theft of personal property (lost baggage, etc.)
- Magazines, books, newspapers, or movies
- Optional travel or baggage insurance
- Parking or traffic violation tickets
- Personal accident or property insurance
- Personal entertainment/grooming/gifts/souvenirs
- Trip cancellation insurance (except for development and admissions staff)

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Student Groups/Athletic Teams

Travel with student groups and athletic teams must be approved in advance by the appropriate manager. The following guidelines should be followed when planning travel:

- **Meals**
 - **On Campus/Local:** When student groups/athletic teams are on campus during college breaks, meals should be arranged through Bon Appetit.
 - **Off-Campus:** When student groups/athletic teams are off-campus during college breaks or are traveling to/from competition, meal costs should be calculated in advance. Any unused funds must be returned to the Accounting Office.
- **Cash Advances:** A Beloit College Advance Voucher should be submitted to the Accounting Office when requesting a cash advance for student group/athletic team travel. In order for an advance to be available on Friday, the Advance Voucher must be received the previous Wednesday by noon.
 - In the event that a per diem is received for a student who does not travel, the per diem amount must be returned to the appropriate account (e.g. if a cash advance is received for 20 students but only 19 go, the per diem amount for one student must be returned to the Accounting Office for credit to the appropriate account).
- **Entertainment:** The College will reimburse reasonable entertainment expenses if they are (1) intended to benefit the entire student group or team and (2) approved by the appropriate manager (e.g. movies for the bus trip are acceptable, movies/incidentals charged to the room are not). Other entertainment expenses are the responsibility of the individual participants.
 - Unusual entertainment expenses (e.g. amusement parks, theme parks, museums, theatrical performances) must be approved in advance by the appropriate Vice President.
- **NCAA Post-Season Tournament Travel:** The College recognizes that travel for NCAA post-season competition must be arranged through an NCAA travel agent and that exceptions to the above guidelines may be necessary for team travel.

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Receipts

Receipts must be included for all reimbursable expenses on the Employee Expense Reimbursement Form.

- **Business Meals:** Receipts must be the original, itemized, detail receipts stating what items have been paid. Receipts for business meals must include a notation indicating the people hosted. The business purpose should be listed on the Employee Expense Reimbursement Form. It is not necessary to include account numbers or employee name on all receipts.
 - **Missing Receipts:** If a receipt is not available, a Missing Receipt Affidavit (MRA) must be submitted with the Employee Expense Reimbursement Form. MRAs should not be used in lieu of original receipts on a regular basis.

- **Electronic Receipts:** Supporting documentation for on line booking or purchases must be a receipt and not a confirmation or reservation. Detailed below are the minimum requirements for an electronic receipt to be acceptable as proof of purchase:
 - E-TICKETS:
 - Passenger name
 - Issue date
 - Ticket number ** A ticket number on the receipt indicates that a ticket has been purchased.
 - Total payment
 - Itinerary or routing
 - Payment Type

 - REGISTRATIONS:
 - Name of attendee
 - Name of conference
 - Amount paid
 - Dates
 - Type of Payment

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When Bad Things Happen ...

- **Accident in Rental Vehicle:** Seek necessary medical attention and then alert the College. Please note the differences in reporting accidents which occur locally and those which occur outside of Beloit.
 - **Local:** Immediately report any accidents or damage you incur while driving a College vehicle to the Beloit police department and Beloit College Security.
 - **Local Police:** Dial 911 for emergency assistance.
 - **College Security:** The Beloit College Security Department can be reached at 608-363-2355. Explain to the operator that you are affiliated with the College and that you have been involved in an accident while operating a College vehicle.
 - **Out of Town:** Immediately report any accidents or damage you incur while driving a rental vehicle to the local police department (by dialing 911), the rental company (contact information should be included with your rental agreement), and your supervisor.
 - **Injuries:** In the event you are injured while traveling for Beloit College or while using a vehicle owned or rented by Beloit College, you must report your injury to Human Resources at 608-363-2630. Non-emergency injuries should be reported as soon as possible, and emergency injuries should be reported after receiving medical treatment.
- **Stolen/Lost Belongings:** Please do not travel with expensive personal items as they will not be replaced by the College in the event they are stolen or lost. When traveling, you should have with you copies of both sides of any credit cards you are carrying. If the cards are misplaced, all information needed is available (e.g. card number, telephone numbers).
- **Stolen/Lost College Credit Card:** Call the number listed below for your type of Corporate Credit Card in addition to notifying the Accounting Office at 608-363-2206.
 - BMO Harris Corporate Visa Card – The toll-free number to report a missing card is 1-877-605-5403.

- JP Morgan Chase Corporate Master Card – The toll-free number to report a missing card is 1-800-316-6056. You will need to provide the Security Identifier (4 digits) from your JP Morgan Chase Master Card Application.
- **Lost Luggage:** Locate your airline service desk and seek assistance. The airline may provide compensation at their discretion. The College will not reimburse travelers for lost luggage.
- **Stuck in Airport:** If there are no available flights, locate your airline service desk and seek hotel accommodations. If the airline refuses to provide accommodations, seek an affordable hotel near the airport. Any expenses incurred from such an arrangement should not be expensed. Instead, you may apply for reimbursement through the Accounting Office. Contact the Controller upon return for details.
- **Poor Driving Conditions:** When severe weather makes driving unsafe, seek shelter/lodging. Do not risk your own (or students') personal safety. The College will reimburse expenses incurred under such circumstances with the approval of your supervisor.
- **Severe Illness:** Should you become severely ill while traveling, seek medical assistance. Most hotels will refer you to a hospital/doctor. Contact your supervisor immediately for support regarding appointments and travel arrangements.
- **Extreme Family Emergency:** Contact your supervisor immediately with the details of the emergency. Your supervisor may then assist you in making any necessary arrangements.
- **Canceling a Trip:** A trip may only be cancelled in extreme circumstances and with the authorization of the supervisor who approved the trip.