

JEFFERSON TRAVEL EXPENSE GUIDELINES

It is the policy of Jefferson to reimburse employees required to travel on Jefferson business on the basis of actual and reasonable expenses incurred.

REIMBURSABLE TRAVEL EXPENSES AND RECEIPTS

- A. **Lodging** - Travelers are expected to utilize economical accommodations. Reimbursement for lodging should not exceed the normal rate for single occupancy. Corporate or conference rates should be utilized whenever possible. If an employee is attending a convention or conference, use of the convention or conference hotel is appropriate. An itemized hotel statement or folio is required.
- B. **Meals** - Meals will be reimbursed on the basis of actual and reasonable costs. Original receipts are required for all meals in excess of \$25. A credit card charge receipt is acceptable.
 - 1. An alternative for overnight travel is the per-diem allowance defined as a flat daily allowance in lieu of receipts. A link to meal per-diem rates can be obtained from the Controller's Office website <http://www.jefferson.edu/controller/departments/AccountsPayableStart.cfm>.
 - 2. Employees may claim up to the maximum per-diem allowance for the location, however it is expected that the employee will claim actual expenses if less than the maximum. Meal per-diem allowances must be adjusted for meals provided by the conference or other hosts that did not require payment directly by the employee.
 - 3. The per-diem option is available only on a per trip basis.
- C. **Air Transportation** - Coach accommodations must be used. Travelers should take advantage of advance purchase rates and/or airline discounts whenever possible. Original receipts are required for air transportation; a plane ticket stub is acceptable.
- D. **Rail Transportation** - Coach accommodations must be used. Standard Metro liner service is allowable when reserved seating is required. Original receipts are required for rail transportation; a train ticket stub is acceptable.
- E. **Private Automobile**
 - 1. Use of a traveler's automobile will be reimbursed for actual miles driven at the current Jefferson mileage rate available from the Controller's office website <http://www.jefferson.edu/controller/departments/AccountsPayableStart.cfm>. This rate covers automobile expenses including gasoline.
 - 2. Reimbursement for two or more persons traveling in the same automobile shall be limited to the driver.
 - 3. Parking and tolls will be reimbursed. Original receipts are required for tolls exceeding \$25.
 - 4. Jefferson will not reimburse violations such as parking tickets, fines for moving violations, vehicle towing charges, etc.
 - 5. For local travel, normal commuting mileage from the employee's home to Jefferson must be excluded from reimbursement. Where air travel is more appropriate, the amount reimbursed for driving shall not exceed the cost of coach airfare and ground transportation costs to the destination had air travel been used. Jefferson's preferred travel agent can provide documentation regarding airfares. The traveler must attach documentation to the Report of Travel Expenses that the reimbursement request is lower when driving versus coach airfare.
- F. **Automobile Rental** - Rental of an automobile is permitted when other transportation is not available or when its use results in cost saving over other modes of ground transportation.

Original receipts are required for automobile rental and gasoline. Such rentals will be reimbursed on the following basis:

1. Rental vehicle size should be limited to economy or mid-size.
 2. Gasoline charges are reimbursable. Traveler should attempt to refill rental vehicle prior to return since refueling charges at rental agencies are generally more expensive.
- G. **Taxicabs/Airport Shuttles** - Transportation services will be reimbursed. Original receipts are required for taxicabs/airport shuttles exceeding \$25.
- H. **Tips** - Tips for service are reimbursable and must be reasonable in nature and dollar amount.
- I. **Telephone** - Telephone calls related to Jefferson business will be reimbursed if a statement is furnished indicating the name and relationship of the party with whom communication was held.
- J. **Internet Access**- Internet Access will be reimbursed provided that such access is required for business related purposes.
- K. **Laundry** - Basic laundry services will be reimbursed for stays of more than one week.
- L. **Miscellaneous** - Original receipts are required for miscellaneous expenses exceeding \$25.
- M. **Expenses Partially Covered** - If an expense is partially covered by an organization other than Jefferson, duplicate copies of the receipts may be submitted by attaching a copy of the request for reimbursement submitted to the other organization. Documentation of the organization's agreement to pay for expenses is required.

NON-REIMBURSABLE TRAVEL EXPENSES

Travelers are expected to exercise good business judgment in their use of Jefferson funds. Non-reimbursable expenses include, but are not limited to:

- A. Fees for failure to cancel transportation or hotel reservations
- B. Additional insurance (other than automobile)
- C. Fines (parking/traffic violations)
- D. Lost or stolen property or tickets
- E. Maintenance/repair of personal automobile
- F. Child care fees
- G. Home care fees
- H. Pet care fees
- I. Toiletries/pharmaceutical items, newspapers/books
- J. Haircuts/beauty salon services
- K. Meals covered by conference or registration fees, or any other instance in which the employee does not pay for the meal
- L. Individual limousines
- M. Movie rentals
- N. Normal commuting miles to and from employee's home and Jefferson
- O. Payments to individuals for any services or purchase of goods
- P. Travel expenses for spouse/dependent accompanying the traveler
- Q. Recreational fees for the traveler or anyone accompanying the traveler

PREPAID EXPENSES

Jefferson will prepay expenses (e.g., conference registration and deposits for hotel reservations) to a vendor when these expenses must be paid before the planned trip using a Request for Payment.

ADVANCES

Travel advances are generally not granted. If reimbursement after the travel occurs is not feasible, an advance is available using the Report of Travel Expenses when out-of-pocket travel expenses are estimated to exceed \$500. Advances will be provided as a non-taxable earning in the employee's paycheck in the pay closest to the start of the trip.

Additional travel advances will not be processed for an employee until outstanding travel advances are reconciled. Advances not settled within sixty (60) days of the completion of the trip will be considered to be non-business related and will be subject to taxation on the first pay period after sixty (60) days have elapsed.

TRAVEL EXPENSES FOR NON-JEFFERSON EMPLOYEES

Travel expenses for non-Jefferson employees such as guest speakers, consultants, and prospective employees, are subject to the same regulations pertaining to Jefferson employees.

BUSINESS COMBINED WITH PERSONAL TRAVEL

Reimbursement for meals, lodging, and other expenses will normally be limited to expenses incurred a day prior to or after the meeting, conference, or other business activity attended by the traveler. An additional night may also be reimbursed if the conference schedule makes travel impossible or unsafe. This situation must be documented and approved by the department head.

Expenses incurred on an additional night may be reimbursed if extending the period results in a reduced round trip airfare sufficient to cover or exceed the meals, lodging and other expenses. Documentation of the savings must be included with the Report of Travel Expenses and can be obtained through the Jefferson preferred travel agency.

EMPLOYEES TRAVELING TOGETHER

Employees traveling together should account for travel costs on an individual basis and report such expenses on separate Reports of Travel Expenses. An exception occurs when several employees are dining together. In this situation, the most senior person present should incur and report the expenses.

FOREIGN TRAVEL

Travelers requesting reimbursement for expenses paid in foreign currency must provide the exchange rate being used and the U.S. dollars equivalent on all receipts. If expenses in foreign currency are paid by credit card, they may take longer than thirty (30) days to appear on the traveler's statement. In this case, the traveler should account for all other expenses within thirty (30) days of completion of the trip, but may request at a later time reimbursement for foreign items charged by submitting the credit card statement as well as the original receipts and charge slips for those expenses.

Foreign air travel under sponsored agreements warrant special consideration. Consult the Office of Research Administration for details.

TRAVEL UNDER SPONSORED AGREEMENTS

Federal grants and/or contracts may have more restrictive policies toward travel and business related expenses. These policies supersede any internal policies and procedures. Consult the Federal Acquisition Regulations, the granting agency, or the Office of Research Administration for guidance or assistance.

APPROVALS

Travelers and approvers must sign their own names (no approval stamps) certifying that the information contained on the Report of Travel Expenses is accurate and that all claimed expenses are allowable and incurred in the conduct of official Jefferson business.

Those personnel reporting directly to a Senior Officer must obtain approval for reimbursement from the Senior Officer to whom they report; or, in the case of unavailability, from the Vice President for Finance/CFO. Senior Officers requests for reimbursement shall be approved by either the President or Vice President for Finance/CFO or designee if both the President and CFO are unavailable.

Individuals may not approve their own travel expenses. Individuals may not have their travel expenses approved by an individual who reports to them.