

Travel Policy and Guidelines

Tulane [University's Travel Policy](#) and the [Policies and Procedures for Purchasing and Expense Reimbursements](#) set forth the university's policies for travel and expense reimbursements.

The University Relations and Development Travel Policy and Guidelines provide information on how specific travel, purchasing, and expense reimbursement policies are implemented in Development and Alumni Relations. All staff traveling on Tulane business are expected to exercise good judgment with respect to expenses, and are expected to steward the university's resources responsibly.

It is the responsibility of every Development and Alumni Relations employee to be familiar with the travel and expense reimbursement policies and procedures, and to follow them. Failure to follow the guidelines may result in one or more of the following actions:

1. non-reimbursement of expenses incurred on the university's behalf;
2. loss of use of the corporate card; and/or
3. disciplinary action, including staff counseling reports, negative performance evaluations, and/or dismissal.

Recoupment of Unallowable Expenses and Dispute Resolution

Violations of the travel and business expense policy will result in the recoupment of unallowable expenses from the employee through a payroll deduction or check deposited by employee with Accounts Payable. In situations where an employee submits a personal item as a business expense, the employee will be notified and possible disciplinary actions will ensue.

All reimbursement requests should be made promptly, within 45 days of the date the expense was incurred or the last expenditure date for a trip of multiple day duration. Expenses submitted after 60 days may be refused. If a late reimbursement request is approved by an administrator, the reimbursement may be characterized as taxable wages instead of an expense reimbursement. All late requests must include [proper documentation](#) explaining the reason the request is late or they will be refused.

Travel Expense Guidelines

Once an employee receives a university corporate card, all expenses must be paid for with the Tulane Corporate Card when possible. No personal expenses should be charged to the Corporate Card, including hotel and meal expenses that are not allowed under these guidelines. **You will be responsible for reimbursing the university for any personal expenses charged to the corporate card before your business expenses are reimbursed.**

Each traveler should provide estimates of travel costs to his or her department head in advance for approval prior to the purchase of any airline ticket or hotel stay. These estimates must include a flight itinerary and the estimated cost of air travel and hotel stay. **If there is no pre-**

approved estimate on file, there is no guarantee that you will be reimbursed for travel and expenses associated with the trip.

Itineraries

Itineraries must be attached to all Development and Alumni Relations trip expense reimbursement requests. Additionally, in Development, a copy of all travel itineraries should be sent electronically to the manager of Development Administration as soon as possible before travel begins. Only the most direct travel routes between origination and destination points should be booked. All staff are expected to return to New Orleans as soon as possible after the conclusion of their required travel.

If a trip spans a week, returning to New Orleans for the weekend or between scheduled two week trips is allowed only under the following conditions: The cost of the additional airline ticket and associated ground transportation expenses are less than the total cost of lodging and meals that would be incurred if the traveler remains in place; your presence is required in New Orleans as part of a Development or Alumni Relations program or other university function.

Air Travel

All trips must be booked using the Concur online booking tool of Tulane's travel agency, World Travel. Travel should be booked at the lowest fare possible that meets the business needs of the travel. Bookings should be for the most direct flights at the lowest possible round trip fare, coach class, regardless of airline. As these are generally nonrefundable, non-upgradeable fares that usually incur substantial penalties or fees to change, all changes to ticketed flights should be reviewed and approved by the department head prior to initiating the change. ***NOTE: If airfare will be greater than \$600 round trip for a coach fare, or if one-way tickets are purchased, officers must provide justification for the expense and obtain written pre-approval from the department head.*** Approval must be forwarded to the manager of Development Administration via email or fax. **If approval is not obtained prior to travel, there is no guarantee that the expense will be reimbursed.**

Upgrades using rewards/miles are a personal expense and are not reimbursed.

Generally, employees are not allowed to benefit from the conduct of business on behalf of the university. Therefore, airline travel mileage programs must not be considered when booking travel. **Under no circumstances should a traveler purposely delay booking a trip, or insist upon a higher priced ticket when lower fares are available in order to gain frequent flyer credits.**

When travel plans change for any reason, the traveler is responsible for notifying World Travel to apply the unused ticket to the next business trip.

Itemized receipts must be submitted as supporting documentation for reimbursement.

Reimbursements will not be issued for travel expenses that are not directly related to the development trip or that have not yet occurred.

Baggage and Additional Fees

Fees that are reasonable and appropriate for the purpose and length of the business trip are reimbursable. The following fees are not reimbursable:

- Fees for excessive baggage
- Fees for baggage that is personal in nature (e.g., golf clubs, instruments, etc.)
- Fees for insurance (life, flight, accident, personal property, baggage, etc.)
- Fees for a “premium” seat on any flight, including but not limited to exit row seating, additional leg room, early check-in/boarding privileges, etc.
- Ticket upgrades (i.e., from coach to business). Development officers may not travel in first class at the university’s expense.
- Personal membership dues (including airport clubs)

Lodging/Hotel Reservations

Travelers are required to use the Concur online booking tool or contact the university’s travel agency, World Travel, directly to book hotel rooms. All hotel reservations booked through Concur are processed by the university’s travel agent. If lower rates for accommodations are available (e.g., conference room block rate), these may be booked directly with the hotel or through the conference housing bureau. World Travel does not charge an agency fee for booking hotels, but there may be exceptions (e.g., group bookings, special events, etc.). Confirm possible agency fees with World Travel when booking direct.

Tulane University is exempt from paying all local state, parochial, and municipal taxes. Some, but not all, states honor the tax exemption. When booking a room, please provide Tulane’s current [Louisiana Exemption Certificate](#) at check-in so that the stay may be recorded as “tax exempt.” **Hotel bills must be paid for with a Tulane Corporate Card in order to receive the university’s tax exemption.**

Tulane’s tax exemption certificate and a [list of those states that honor Tulane’s tax exemption](#) along with their specific requirements for [evidence of Tulane’s tax exempt status](#) may be found on the General Counsel’s website and also on the Development intranet. Travelers should carry the relevant forms and completed certificates to all destinations.

Itemized receipts for all hotel/motel expenses must be submitted with the reimbursement request. It is the responsibility of the traveler to request an itemized bill at checkout. Personal expenses incurred by the traveler should be itemized on a separate bill and paid for separately as they are not reimbursable by the university. If personal expenses are paid for with a Tulane Corporate Card, the traveler must reimburse the university for those expenses before his or her business expenses are reimbursed.

Reimbursements for hotel expenses will be determined by the destination city and whether expenses there are considered to be high (“*expensive*”) or normal (“*typical*”). The following lists of cities in each category are not final and may be adjusted as necessary.

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Hotel Class and Rooms

The class of hotel should be reasonable and appropriate for the business purpose and location. Travelers should stay in standard or equivalent rooms. Room upgrades using rewards miles, credits, or personal payment methods would be considered a personal expense and not reimbursable.

Hotel expenses in “expensive” cities generally may not exceed \$350 per night. Expensive cities include New York, Boston, Philadelphia, Washington, D.C., Miami, Dallas, Houston, Los Angeles, San Diego, San Francisco, Denver, St. Louis, Chicago, Phoenix, Baltimore, and Santa Fe.

Hotel expenses in “typical” cities generally may not exceed \$200 per night. Typical cities are cities other than those considered “expensive.”

Exceptions to these dollar limits may be considered and approved on a case by case basis by the department head with appropriate justification.

The following hotel expenses are not reimbursable: in-room movies; mini bar expenses (unless the mini-bar items constitute breakfast, lunch, or dinner); laundry expenses on trips of one week or less; toiletries. All telephone calls from hotels should be made on via cell phone unless you are dialing in for system access.

International Travel

Travelers are required to use the Concur online booking tool or the university’s travel agency, World Travel, to book international travel. All international reservations booked through Concur or directly with the travel agent will be automatically be uploaded to International SOS (ISOS).

Meals

Meal expenses should be reasonable and customary. Unless entertaining a donor, expenses for personal breakfast, lunch, and dinner, and incidentals (gratuities) **must not exceed \$75 per day, and should generally follow the guidelines listed in the chart below:**

Continental Breakfast/Breakfast	\$	10
Lunch	\$	18
Dinner	\$	37
Incidentals	\$	10
	\$	<u>75</u>

Expenses over and above the total dollar amount allowed for meals and incidentals are the responsibility of the traveler, and will not be reimbursed by the university. **Staff will be responsible for reimbursing the university for any personal expenses charged to the corporate card before business expenses are reimbursed.**

Meals and Entertainment

Individual meals while traveling are reimbursable on the basis of actual expenses incurred as supported by either itemized receipts or per diem, not together. Business meals and entertainment must be reasonable and directly related to university business and approved in advance. The business purpose must be documented in the expense report.

Meals consumed during local travel with no overnight stay will not be reimbursed unless they are with a donor. Purchases of coffee or meals at airports during or before travel will be reimbursed.

Receipts itemizing each meal must be provided for all dining expenses. The names of all guests **must** be included on the receipt for all dining expenses. Accounts Payable will not read itineraries to determine who was present at the meal.

Meals with Donors

If a staff member is in control of dining arrangements, the cost of dinner per person **should not exceed \$75 per person**, including development officers or staff, other university staff, and all guests.

Expenses for alcoholic beverages are not reimbursable unless dining with a guest or donor, or sponsoring an event in which alcohol is considered integral to the event (prior approval required).

Business Meal and Entertainment Documentation

The Internal Revenue Service requires all business meals and entertainment expenses include:

- Original receipts
- Proof of payment
- Supportive Documentation, (e.g., flyer or invitation)
- List of attendees with titles and affiliations or identification of a discernible group
- Number of attendees, geographic location, and business purpose.

Gratuities

Gratuities should be kept to a minimum. Guidelines for gratuities are as follows:

- Bellman - \$1 per box or bag
- Valet parking - \$1 for retrieval and/or parking
- Rental car shuttle driver - \$1 per trip
- Taxi cab drivers - 10-15% of the total fare per trip

Tips on meals should generally fall within 15-20% of the pre-tax total cost of the meal.

To receive reimbursement for gratuities, a traveler must fill out a missing receipt form to submit with the reimbursement request (one form for all of these expenses will suffice).

Rental Car Reservations

Travelers are required to use the Concur online booking tool or the university's travel agency, World Travel, to book rental cars. All car reservations booked through Concur are processed by the university's travel agent. World Travel does not charge an agency fee for booking cars; however, there may be exceptions (e.g., group bookings, special events, etc.)

When to Use

Rental cars should be used when they are less expensive than alternative means of transportation (e.g., taxi, Uber, car service, or train) or when convenience or safety issues justify the additional cost.

Car Class and Features

Rental of up to a mid-sized car is reimbursable. Larger vehicles may be rented if there are three or more individuals traveling together, if the traveler is transporting sizeable equipment, or if there are other valid business needs.

The cost of a GPS device may be reimbursed if deemed necessary for safety reasons; however, this cost may not be charged to federal funds. Larger vehicles and GPS device upgrades must be approved in advance. The cost of other upgrades or accessories, such as a satellite radio, will not be reimbursed.

Rental contracts must contain a "return full" option and cars must be returned with a full gas tank. Travelers should decline the pre-paid fuel options and refuel the rental car prior to returning to the rental agency. The cost of business related fuel will be reimbursed.

Receipts for all car rental, gasoline, parking fees, and toll expenses must be presented for reimbursement.

Tickets, fines, parking or violations associated with travel and charges for vehicle lockouts are the responsibility of individual travelers, and will not be reimbursed. All business-related tolls and parking charges will be reimbursed.

Insurance

All rental cars should be charged to the Tulane corporate card account to ensure insurance coverage. Please obtain Enterprise or National courtesy cards from the manager of Development Administration before travel. Tulane is insured by Enterprise, and Enterprise should be used during all travel trips. If driving the rental car from one city and dropping it off at another, National, which is owned by Enterprise, should be used. Full-time employees using Enterprise are automatically covered by the university's insurance plan. Therefore, there is no need to purchase additional insurance. However, you may be asked to provide a copy of your personal insurance policy, just as proof of insurance.

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Employees renting in Tulane's name from non-preferred rental providers should purchase supplemental liability insurance and collision damage waiver insurance. For rentals used solely for university business, the cost will be reimbursed.

Employees using their own personal credit card for rentals may not use the university's name on the rental agreement and should provide their own insurance coverage.

Use of Personal Vehicles

Employees who use their personal vehicles to conduct Tulane business are responsible for automobile liability and physical damage associated with the operation of the vehicle. The use of personal vehicles is reimbursed at the standard government mileage reimbursement rate in effect. Use of personal automobiles for business travel is reimbursable when it is less expensive than alternative means of transportation or when convenience or safety issues justify the additional cost. Use of personal automobiles for normal commuting will not be reimbursed.

Generally, travel to the North Shore, Biloxi, or Madison, Mississippi campuses from New Orleans will be reimbursed if attendance is required at a meeting at those locations during the course of regular work responsibilities. Mileage expenses will not be reimbursed for travel from the North Shore to New Orleans to attend weekend events related to your work responsibilities.

Travel between an employee's home and Louis Armstrong New Orleans International Airport may be reimbursed. A travel itinerary must be presented with a reimbursement request. Long-term and overnight parking at the airport is reimbursable with itemized receipts and itinerary.

PLEASE NOTE: Exceptions to these guidelines, e.g., hotel costs related to presidential development travel, etc., will have to be reviewed with the appropriate VP or SVP, whichever is applicable, in advance of the travel. For questions about the guidelines and policies, please contact your department head or the Manager of Development Administration.

Unallowable Expenses

Expenses incurred related to university business should be allowable, reasonable, and ordinary in the normal course of business. Examples of non-reimbursable expenses include, but are not limited to, the following:

- Babysitting
- Car service for normal commute
- Car washes and detailing
- Clothing, luggage and toiletries
- Damages incurred to any form of lodging, rental accommodations or vehicles as a result of engaging in activities not directly related to Tulane business.
- Fines, credit card interest and fees, bank fees, late fees, etc. However, foreign currency conversion fees are reimbursable.
- Fuel for personal vehicle
- Hair or shoeshine services
- Hotel or car “no-show” charges without a business purpose
- Magazines, newspapers
- Non-business postage
- Personal or in-room entertainment (e.g. sporting events, movies, games, etc.)
- Pet care
- Prescription medication
- Souvenirs and personal gifts
- Vacation and personal expenses

University Travel References

[Office of Insurance and Risk Management](#)

[Tulane Accounting and Management Systems](#)

[Corporate Travel & Entertainment Card Policies & Procedures](#)

[Tulane Travel Clinic](#)

[Tulane ISOS portal](#)

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Reimbursable Checklist

Expense Items	Reimbursable	Non-Reimbursable	Reimbursable with Exception or Approval	Comments
Airline Related Expenses				
Airline club memberships		X		
Seating class upgrades and early bird check-ins		X		Includes Economy to Economy Plus, Economy to Business and Business to First and early check-in
Seat assignments for aisle or window seats			X	When in compliance with standard class of service and fee exists for all window/aisle seats (i.e. Air Canada Tango, WestJet, & Porter)
In-flight entertainment		X		
Travel insurance		X		
Non-refundable ticket change fees			X	May not be charged to Federal awards since tickets are usually required to be unrestricted
TSA Pre, Global Entry Programs, etc.		X		
Luggage replacement		X		
Luggage - checked	X			Customary and reasonable expenses; more than 2 pieces of luggage require written explanation on expense report
Passport/visa services (for business travel)	X			
Wireless internet			X	According to policy
Hotel Related Expenses				
Extended stays > 30 days	X			According to policy
Dry-cleaning or laundry expense	X			For business trips 6 days or more in duration
Hotel or conference cancellation charges, late fees or No-Show fees			X	Exception approval according to policy
Hotel room upgrades		X		

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Expense Items	Reimbursable	Non-Reimbursable	Reimbursable with Exception or Approval	Comments
Hotel spa services		X		
Hotel Health Club/Fitness center fees		X		
Tips (bellhop, maid, etc.)	X			Reimbursable as part of daily per-diem or actuals not to exceed \$5/day
In-room movies		X		
Mini-bar charges		X		
Wireless or wired internet	X			When not included in the nightly rate at an approved property and used for university business purposes
Ground Transportation Related				
Car rental expense	X			For university business travel only
Traffic and parking fines/violations		X		
GPS system rental	X			According to policy
Parking fees	X			
Personal car mileage	X			To/from business meeting; normal commute must be deducted, refer to policy
Rail charges	X			Associated with business travel, refer to policy
Taxi charges	X			
Toll charges	X			
Toll fee technologies	X			(i.e. EZ Pass, etc.)
Transportation from employee's home to office		X		
Meals & Entertainment				
Entertainment employee	X			According to policy
Entertainment non-employee	X			According to policy
Meal expense associated with business discussions	X			According to policy
Meal expense with NO overnight stay (local travel)			X	According to policy

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Expense Items	Reimbursable	Non-Reimbursable	Reimbursable with Exception or Approval	Comments
Tips	X			Tips must not exceed 20% of the meal cost
Cash Advances		X		
Credit Card				
Travel card interest fees		X		Cash advance expenses/fees
Personal card fees		X		The travel card is to be used for all university business expenses
Other				
Briefcase replacement if lost or stolen while traveling on business		X		Refer to Office of Risk Management
Clothing purchase or replacement if lost or stolen		X		Refer to Office of Risk Management
Personal items (i.e. toiletries, etc.)		X		
Doctor fees/Medical fees/Prescriptions		X		Refer to Office of Risk Management
Immunizations (for overseas business travel)	X			Refer to Tulane Travel Clinic and Risk Management for further information
Gifts				
Spouse travel business purpose		X		
Spouse travel non-business purposes		X		
Travel insurance		X		