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Point Park University

Travel Policy Statement
Effective March 1, 2002

*See next page **

This policy is intended to provide a clear and concise understanding of the Point Park University Travel and Business Expense Policy. The purpose of the policy is to insure that University employees travel to conduct business in a manner that is consistent with use of University resources to achieve the mission of the University. This policy applies to all faculty, staff and students who incur expenses while engaged in University business. The policy is intended to comply with all applicable federal regulations and to promote reasonable and cost-effective travel policies and procedures.

The policies and procedures meet the definition of an accountable plan under the guidelines issued by the Internal Revenue Service. Therefore, expenses reported according to such guidelines are not reportable as employee income.

For any expense to be reimbursable, the expense must be:

1. actual and reasonable
2. necessary in performance of Point Park University business
3. supported by proof of expense
4. in compliance with the conditions of this policy

The Business Office through the Vice President of Finance will provide interpretations of the Travel and Business Policy. Any variation of this policy must be approved in advance by the President or Vice President of Finance and Administration. It is the responsibility of the traveler to submit all forms within thirty (30) days of return. The Business Office will review the expense reports and documentation for accuracy and policy adherence. Periodic audits may be conducted to monitor compliance with this policy.

I. Non-Reimbursable Expenses

The following expenses are *not reimbursable* under this policy:

1. Alcohol
2. Fines for traffic or parking violations
3. Child care expenses
4. Personal credit card fees
5. Travel Insurance
6. Theft, loss or damage of personal property including lost baggage
7. Cancellation or "no-show" charges for hotel or car service
8. Personal auto repairs
9. Pet care expenses
10. Home maintenance including lawn care
11. In-room movies
12. Personal services such as barbers, hairdressers, health clubs, massages, etc
13. Laundry or valet service for trips lasting less than one week
14. Prescriptions and routine medical expenses
15. Travel upgrades
16. Employee tickets and related expenses for shows, sports and social events while traveling on University business
17. Personal telephone charges in excess of reasonable calls home, generally one per day and in accordance with telephone policy.
18. Dues for airline clubs
19. Expenses incurred for non-business day travel unless it is scheduled to reduce air transportation costs.

This list is a guide and it is not considered to be all-inclusive. All business/travel expenses are subject to review and final approval by the Business Office. Vice-Presidents and Academic Deans can make exceptions to reimbursement for the purchase of alcohol and tickets for shows, sports, and social events, for official entertainment to advance the mission of the university.

II. Telephone Policy

Business travelers will be reimbursed for telephone, fax and computer connection costs that are reasonable and necessary for conducting University business. A reasonable number of personal telephone calls, usually one per day, are generally reimbursable. Telephone credit cards will be issued prior to travel. Use of a telephone credit card will significantly reduce telecommunications charges. Cellular phone calls are not reimbursable except in an emergency situation. Only de minimus hotel room surcharges (\$1.00 or less per call) will be reimbursable.

Facsimile transmissions and Internet access charges will be reimbursed when associated with business. Telephone policies regarding room surcharges and cellular phones do not apply for employees who are on call or contacted during personal time off.

III. Travel Advances

Travelers are encouraged to utilize either personal credit cards or a Point Park University credit card so travel advances will be limited. Advances will generally be limited to the daily meal per diem plus \$100 per trip. An advance may not be requested more than ten days prior to date of travel and must be approved by the administrator authorizing the travel. No advance will be provided if there is an outstanding advance. Accounting for expenditures related to this advance must be completed within thirty (30) days from the date of travel return. All advances must be accounted for by fiscal year-end (August 31st) otherwise the travel and business expenses will be charged against the following budget year.

IV. Air Travel

Travelers are expected to travel using commercial airlines at the cost of the "lowest logical airfare." The lowest logical airfare is defined as the lowest-price coach class airfare for flights within two hours before or after the requested departure or arrival time. Reservations do not have to exceed a 1-1/2 hour layover or include more than one stop and/or connection. The reservations should also not require the traveler to arrive later than necessary to participate in all events or to depart before the completion of the event. If exceptions to the lowest logical cost are required for medical or other reasons, approval by the Business Office must be obtained prior to securing reservations. Reservations should be made as soon as possible to obtain advance purchase discounts. If convenient and if there is a cost savings, travelers should consider staying over on a Saturday night. The University will reimburse for lodging and meals if such costs are less than the airfare savings.

Reservations should be made through the preferred provider unless you are able to secure a comparable price through another source. Documentation of ticket price must be included in the travel expense report. Employees may retain any frequent flyer miles earned while on business travel, however upgrades or extended trips to earn additional miles are prohibited.

V. Meals and Lodging

Travelers may choose either a per diem reimbursement for daily meals or reimbursement of actual and reasonable expenses. The method chosen must be used consistently for the entire trip. The current daily per diem rate is \$47 per day. Per-diem reimbursement will be pro-rated on travel dates or dates when meals are included in conference events. The reimbursement rate is Breakfast - \$9.40, Lunch - \$16.45, Dinner - \$21.15. Gratuities are included in the per diem or actual meal expense.

If submitting receipts for actual expenses, the department chair/director will be responsible for determining reasonableness. The established guideline is expense totals that do not exceed \$30-\$50 per day for travel to suburban areas and \$50-\$75 per day for travel to metropolitan areas. Expenditures that exceed these guidelines will require explanation. Department chairs/directors may establish lower guidelines at their discretion. Travelers are expected to be cognizant of the business purpose of the trip and expenditures should be made accordingly.

In general, trips of less than 50 miles one way do not qualify for reimbursement for an overnight stay. Receipts for lodging are always required. The rate may not exceed the standard single room rate. Accommodations at resort hotels are not permitted unless the hotel is the site of the conference being attended. The traveler is responsible for changes and cancellations. Failure to cancel a guaranteed hotel reservation may result in a "no-show" billing which will not be deductible from the expense report. Meals and incidentals on lodging receipts must be itemized separately.

Although lodging should be secured at the most economical price possible, travelers should follow all safety and security guidelines established by their departments and professional organizations.

VI. Receipts

Receipts for lodging are always required except for foreign travel. Because of the variability of foreign rates and accommodations, foreign lodging will be reimbursed using the federal per-diem rate. Meal receipts should include the name and location of the restaurant, the number served and the date and amount of the expense. Gratuities should be shown on the credit card or restaurant receipt when possible.

Expenses under \$25.00 (such as taxis or tips) do not require receipts; however, expenditures must be itemized and accurate.

VII. Rental Cars and Use of Personal Vehicles

The University will reimburse the traveler for the cost of a compact or standard-size car. Upgrades may be authorized by the Business Office depending upon number of persons and length of commute. Before renting a car, the traveler should determine whether the use of taxis or shuttles would be more cost effective. Mileage is not reimbursable but the direct cost of gasoline may be claimed on the traveler's expense report.

Rental reservations should be made through the preferred provider, Enterprise, unless a comparable rental can be secured elsewhere. Cost verification is required with the expense report. The rental agreement must reflect Point Park University for the University's automobile insurance to apply to the rental. Loss damage or collision damage waivers should be refused since this coverage is already provided through the University's carrier. Only a Point Park University employee may be a designated driver of a rental vehicle.

If an employee is utilizing the University's automobile policy, a prior driver's license release must be secured through the Physical Plant Department. If authorization is not secured then the traveler should use his/her insurance when renting a vehicle.

The physical condition of the car should be examined prior to leaving the rental lot. Damages should be documented on the car rental agreement to avoid possible disputes. The original rental receipt should be submitted with the expense report. Rental cars should be refueled prior to return to avoid surcharges.

If it is cost effective, a privately owned vehicle may be used for business travel provided that the owner insures the vehicle and the owner has a valid driver's license. The operator assumes all responsibility for accidents to the extent of the owner's coverage including any deductibles.

The cost of using a private vehicle should not exceed the cost of air transportation. The use of a private vehicle will be reimbursed at the prevailing Internal Revenue Service mileage rate. This rate covers all operating costs including depreciation, repairs, gasoline, insurance, towage and similar expenditures. Mileage is calculated at the lesser of the distance from the normal place of business to the destination point or the employee's home and the destination point.

VIII. Travel Expense of Guests

In general, the expenses of a spouse, family member or others accompanying the business traveler are not reimbursable. Point Park University will reimburse for the single room rate. If the cost of the room exceeds the single room rate because of an additional non-business guest, the traveler is responsible for payment of this additional charge. If the traveler is using the reimbursement rather than the per diem rate for meals, the traveler should request separate checks so the business expense is identifiable.

IX. Combining Business with Personal Travel

If the traveler takes an indirect route or interrupts a direct route, reimbursement for airfare will be either the less of the actual expense or the most economical roundtrip to the business destination. Any personal portion of the car rental should be deducted from the total rental bill by subtracting the prorated daily cost for the number of days used for personal use. If prorating results in a lower cost to the University than would have been paid without personal travel, the traveler may deduct the higher rate. (For example, if the weekly rate, which included two personal travel days is less than the daily rate for 5 days of business travel, the traveler may deduct the full rental charge as business.) If the traveler is using his/her own vehicle, the mileage reimbursement should be the number of roundtrip miles required to attend the business function.

X. Expense Reconciliation

Employees utilizing University credit cards for meals or miscellaneous expenses (any charges other than rental car, lodging, or airfare) must submit their travel expense report with their credit card statement. Final reconciliation will not be made until both reports are submitted to the Business Office.

Any questions regarding this policy should be directed to the Business Office.