
UNIVERSITY POLICY

Travel Policy

Accommodations for individuals with disabilities in accessing these policies are available upon request by emailing accessiblepolicy@wcupa.edu.

Purpose and Scope

The policies and procedures in this document define eligibility, responsibility, and proper travel reimbursement policy. They are designed to ensure that individual travelers comply with the Commonwealth, Pennsylvania State System of Higher Education (PASSHE) Board of Governors Policy 1986-07-A, West Chester University (WCU) travel reimbursement procedures and IRS regulations regarding qualified business travel expenses.

Employees are reminded that, under these provisions, it is their responsibility to:

- Make official WCU business purchases only
- Protect public funds as if they were your own
- Ensure travel costs are reasonable
- Maintain adequate automobile/liability insurance coverage
- Maintain records for audits and public review for a minimum of 3 years

In cases where specific travel matters are addressed in the collective bargaining agreements, the collective bargaining agreements shall take precedence over this policy.

Policy Statement

-Employee Reimbursement Guidelines:

To request a reimbursement for travel expenses, the traveler must submit a [Travel Expense Voucher form](#).

Completed travel expense voucher forms are printed, signed, and sent to the traveler's manager with itemized receipts and any other supplemental documentation attached for each transaction that identifies the following:

1. The description of the travel taken
2. The type of travel expense
3. The date of the transaction
4. The cost

— UNIVERSITY POLICY —

5. The form of payment used

The traveler must have the travel expense report signed by his/her supervisor, dean or department chair, with the exception of the WCU president, whose travel reports shall be submitted to the Deputy.

AFSCME, SPFPA, SCUPA, OPEIU and APSCUF members should refer to and provide the appropriate provisions of the collective bargaining agreement covering the particular expense and employee's classification with each reimbursement request.

Every attempt should be made to submit the reimbursement request to Accounts Payable no later than 20 days from the conclusion of the trip. Reimbursement requests received after 60 days from the conclusion of the trip may be considered taxable income unless the traveler can substantiate why he/she was unable to submit the expense report within a reasonable timeframe. Approved [travel expense voucher forms](#) are emailed to: Invoices@wcupa.edu.

Procedures

DOMESTIC TRAVEL

Defined as within the contiguous United States

-Reimbursable Expenses:

In general, most travel-related expenditures incurred for the purposes of conducting WCU business are reimbursable. These include:

- Transportation (includes taxi, airline, rental vehicle, bus, train, subway, etc.)
- Lodging
- Meals
- Parking, tolls and similar expenses regardless of the type of vehicle used (personal, rented or WCU-owned)
- Charges for laundry and dry cleaning (when the traveler has been on official travel business for more than 5 consecutive days)
- Tips

Suggested Tip Amounts:

Restaurants	15%-20% of the total bill before taxes
Taxi or Limo Drivers	15%-20% of the total bill

— UNIVERSITY POLICY —

Hotel Courtesy Shuttle Drivers	\$1-\$2 per person, extra if luggage is handled
Porter or Sky Cap	\$1 per bag, \$2 for very heavy bags
Bell Man	\$1 per bag, \$2 for very heavy bags
Room Service	15%-20% depending on service. Often service is already added
Parking Attendant	\$1-\$2 when they bring you your car
Doorman	\$1 -\$2 if doorman hails you a cab and/or helps carry your bags

With approval of the traveler's supervisor and/or Dean the following purchases are also considered reimbursable:

- Miscellaneous reference materials such as books, tapes and videos available for purchase at seminars/conferences
- Incidental business expenses incurred while in travel status, such as copies, faxes, and postage

-Non-Reimbursable Expenses:

In general, any expenses other than those specifically authorized in this policy are not allowed. Some examples include but are not limited to:

- Non-WCU employee expenses
- Commuting between home and main or regular place of work per [IRS Publication 463](#)
- Alcohol
- Business meeting expenditures such as equipment rental and conference room charges which must be made in accordance with purchasing policies
- Gifts, souvenirs or other personal items
- Personal costs incurred while staying at a hotel such as movie charges, entertainment, personal phone calls, athletic club fees and safe fees
- Personal costs related to the conference such as spouse/guest registration fee and entertainment/evening events specifically associated with the conference

-Personal Automobile Use:

Actual mileage incurred by an employee on official business will be reimbursed at pre- established rates (www.gsa.gov). Except for parking and tolls this rate is the only reimbursement that the employee will receive for use of a personal automobile on official travel. Note: Travelers that choose to use their personal vehicle for official WCU travel should inform their automobile insurance carrier. If

UNIVERSITY POLICY

the traveler does not and is involved in an accident the insurance carrier may decline to cover the expenses.

Per [IRS Publication 463](#), transportation expenses between your home and main or regular place of work (primary work location) are considered personal commuting expenses which are not reimbursable as business expenses. When commuting to sites other than the primary work location, reimbursable business mileage is calculated by totaling the number of miles driven that day and subtracting the total number of miles the employee would normally need to commute between your home to your primary work location and back to your home (normal daily commute). Only the mileage in excess of the employee's normal daily commute can be claimed as a business expense.

Mileage must be verifiable through the use of commercially available websites (ex. Google Maps) using the "shortest route" option.

An employee traveling as a passenger in a personal automobile is not entitled to mileage reimbursement.

Examples:

Example #1: An employee travels from their primary work location to a meeting off campus. The employee then stops for lunch on the way to another meeting. Finally, the employee returns to their primary work location. The entire mileage for this trip can be reimbursed.

Example #2: An employee travels from home to a conference and back home again. The total round trip (RT) is 65 miles. The employee's normal roundtrip commute is 10 miles. In this case, 55 miles (65 miles minus 10 commuting miles) can be reimbursed.

Example #3: An employee travels from their primary work location to attend meetings at several locations and then returns home. The employee's normal roundtrip commute is 10 miles. The employee travels a total of 35 miles in a day (mileage calculated from their house). The employee's mileage reimbursement would be 25 miles which is calculated by taking total trip miles starting from their home location (35) less the employee's normal roundtrip commute miles (10).

UNIVERSITY POLICY

-Rental Car Use:

WCU travel policy requires that travelers use the most economical mode of transport available. If a motor pool vehicle is not available, the traveler has the option of using his/her own vehicle or renting a car. Please see the [Rental Car Guidelines](#) and [Motor Pool information](#).

Collision Damage Waiver (CDW) insurance (insurance that covers repair expenses of a rented vehicle) should be purchased when renting a car. No other type of insurance is recommended.

-Airline Tickets:

If an airline ticket is purchased in advance of travel, it is acceptable to submit a reimbursement request for the cost of the ticket prior to the trip commencing.

The airline receipt must include the form of payment and the cities traveled to and from. If the airfare expense is a part of travel arrangements that are charged as one amount, (e.g., Expedia) the traveler must provide an itemized receipt detailing each expense to be reimbursed.

The University will not reimburse for first class travel and fees for upgrades. The University will reimburse for change fees when changes could not be avoided. The University will reimburse for seat assignments, up to \$20.00.

-Lodging:

Employees must identify themselves as WCU employees and request state or governmental rates when obtaining price quotations for lodging. WCU is exempt from Pennsylvania state sales tax. It is the traveler's responsibility to prove WCU's tax exempt status to a merchant by providing an approved Pennsylvania Exemption Certificate. The Certificate must be signed by an authorized West Chester University Finance & Business Services Employee. Please email purchasing@wcupa.edu to request a signed/approved Pennsylvania Exemption Certificate.

WCU employees are required to use the most economical lodging available. However, lodging reimbursement in excess of maximum rates are allowed under the following conditions:

- When lodging cannot be located with a reasonable effort within the maximums
- When an employee must stay in a specific hotel where their presence is required

— UNIVERSITY POLICY —

by the nature of the official business

- o When employees reside at a host establishment while attending a conference or convention on official business

Faculty and staff are **prohibited** from using hosted lodging platforms such as **VRBO and Airbnb** in place of traditional hotel rooms, for University-related travel.

-Meals:

Employees in overnight travel status may be paid for the actual cost of meals up to the maximum per diem rates established by the General Services Administration (GSA). Employees will not be reimbursed more than the [GSA daily subsistence per diem rate](#), even when itemized receipts are provided.

Employees are considered to be in overnight travel status if:

1. They are traveling on approved WCU business **and**
2. Away from both WCU or home **and**
3. Have driven a distance of either fifty miles or one and one-half (1 ½) hours of travel time in one direction at a normal rate of speed and considered reasonable commuting distances.
4. This is subject to weather, itinerary and time considerations.

The per diem rate covers meals, tips, tax and all other expenses not specifically addressed in this policy, for each 24-hour period spent in a continuous overnight travel status. The travel period begins at any time of day or night that the employee leaves WCU or a residence to embark upon overnight travel on official WCU business. This is automatically calculated within the travel expense report. No other calculations will be accepted.

For overnight travel that is not part of a full 24-hour period, the per diem rate will be prorated and rounded to the nearest dollar as follows:

Less than 3 hours	No reimbursement
3 hours to less than 6 hours	25%
6 hours to less than 15 hours	62.5%

Departmental Considerations -- Each department may establish its own policy as to whether they will reimburse the traveler at the per diem rate or require receipts for meals. In the absence of a department policy, the traveler may select the travel

— UNIVERSITY POLICY —

reimbursement method.

	Per Diem	Receipts
Itemized Receipts Required	No	Yes

The maximum allowable reimbursement amount must be reduced for meals provided to the employee at no cost (e.g., included in a registration fee or conference, facility rental, or the cost of lodging). The maximum amount must be reduced by the following rates:

- 21% of per diem rate for breakfast,
- 21% of per diem rate for lunch, and
- 58% of per diem rate for dinner.

VP-level employees and above may exceed the established per diems and be reimbursed for the full amount of their meals if documentation such as a list of attendees, purpose of event, justification for the meeting of the relationship to WCU business is provided.

Employees in non-overnight travel status who work more than two hours before the normal start of the workday or past the scheduled quitting time will be reimbursed for the cost of a meal, up to \$8.00. An employee must state his/her normal work hours on the travel report.

Employees are considered to be in non-overnight travel status if they are traveling on approved university business away from both residence and official headquarters but are not entitled to reimbursement for overnight lodging in accordance with the provisions of the preceding paragraph.

Official Headquarters: "Official headquarters" shall be the building to which the employee is normally assigned.

There is additional information regarding reimbursements for meals to employees who are not in overnight travel status at the following link: [State System Tax Procedures for University Operations](#).

-Travel Advances:

With the exception of AFSCME employees, WCU no longer issues travel advances for routine domestic business travel. Travelers have two options available to cover

UNIVERSITY POLICY

expenses prior to travel:

- Request a WCU travel card
- Use a personal credit card

-Faculty-Led Student Trips (Domestic):

Faculty led programs are defined as any travel taken by a student(s), sponsored by a faculty/staff member, approved by the appropriate VP/Dean and trip funding is in a WCU cost center.

The faculty member must meet with Business Services no less than 3 months prior to departure to plan for the trip expenses. WCU will make every attempt to pre-pay as much of the trip as possible to limit financial concerns that could arise while traveling.

WCU will issue a travel card to the faculty/staff scheduled to travel for expenses incurred while on the trip. Cardholders are reminded that the card is to be used for employee business-related purchases only while traveling. The card may be used in the event of an emergency with permission from the College Business Manager and Card Systems Administrator. If an emergency arises while on the trip, the traveler should contact his/her Business Manager to secure the additional credit line.

Note: In some cases, a purchasing card will be issued to the faculty member for the specific reason of charging the student expenses. In these cases, no cash advance or reimbursement will be granted to the faculty member.

The following documents required to be submitted to Accounts Payable during the initial trip planning session include:

- Approved Travel Authorization Form
- Trip itinerary
- List of students expected to take the trip
- Estimated amount of total expenses
- Explanation of funds collection and allocation

INTERNATIONAL TRAVEL

Defined as outside the contiguous United States

UNIVERSITY POLICY

-Employee Reimbursement Guidelines:

Pre-approval to travel outside the continental United States must be obtained from the appropriate Dean, Chair, Center for International Programs, Provost, and the President of WCU.

Signatures showing approval must be collected on the [International Travel Authorization Form](#) and be on file in the traveler's department at least 4-6 weeks prior to the trip. Management of International Travel is overseen by the [Global Engagement Office](#) (GEO). Travelers will need to contact GEO for further/follow up information specific to travel.

To request a reimbursement for travel expenses, the traveler must submit a [Travel Expense Voucher form](#) with itemized receipts and any other supplemental documentation for each transaction that identifies the following:

1. The description of the travel taken
2. The supplier name
3. The date of the transaction
4. The price
5. The form of payment used

The cardholder must have the [Travel Expense Voucher form](#) signed by his/her supervisor, dean or department chair, with the exception of the WCU president, whose travel reports shall be submitted to the WCU Deputy to the President.

Every attempt should be made to submit the reimbursement request to Accounts Payable no later than 20 days from the conclusion of the trip. Reimbursement requests received after 60 days from the conclusion of the trip may be considered taxable income unless the traveler can substantiate why he/she was unable to submit the expense report within a reasonable timeframe.

-Reimbursable Expenses:

In general, most travel-related expenditures incurred for the purposes of conducting WCU business are reimbursable. These include:

1. Transportation (includes taxi, airline, rental vehicle, bus, train, subway, etc.)
2. Lodging
3. Meals
4. Parking, tolls and similar expenses
5. Charges for laundry and dry cleaning (if the traveler has been on official travel business for more than 5 consecutive days)

— UNIVERSITY POLICY —

6. Tips

Suggested tip amounts:

Restaurants	15%-20% of the total bill before taxes
Taxi or Limo Drivers	15%-20% of the total bill
Hotel Courtesy Shuttle Drivers	\$1-\$2 per person, extra if luggage is handled
Porter or Sky Cap	\$1 per bag, \$2 for very heavy bags
Bell Man	\$1 per bag, \$2 for very heavy bags
Room Service	15%-20% depending on service. Often service is already added
Parking Attendant	\$1-\$2 when they bring you your car
Doorman	\$1 -\$2 if doorman hails you a cab and/or helps carry your bags

With approval of the traveler's supervisor and/or Dean the following purchases are considered reimbursable travel expenses while on WCU business:

- Miscellaneous reference materials such as books, tapes and videos available for purchase at seminars/conferences
- Incidental business expenses incurred while in travel status, such as copies, faxes, and postage

-Non-Reimbursable Expenses:

In general, any expenses other than those specifically authorized in this policy are not allowed. Some examples include but are not limited to:

- Non-WCU employee expenses
- Alcohol
- Business meeting expenditures such as equipment rental and conference room charges which must be made in accordance with purchasing policies
- Gift, souvenirs or any other personal items
- Personal costs incurred while staying at a hotel such as movie charges, entertainment, personal phone calls, athletic club fees and safe fees
- Personal costs related to the conference such as spouse/guest registration fee and entertainment/evening events specifically associated with the conference

UNIVERSITY POLICY

-Rental Car Use:

WCU requires that travelers use the most economical mode of transport available.

Collision Damage Waiver (CDW) insurance (insurance that covers repair expenses of a rented vehicle) should be purchased when renting a car. No other type of insurance is recommended.

-Airline Tickets:

If an airline ticket is purchased in advance of travel, it is acceptable to submit a reimbursement request for the cost of the ticket prior to the trip commencing.

The airline receipt must include the form of payment and the cities traveled to and from. If the airfare expense is part of travel arrangements that are charged as one amount, (e.g., Expedia) the traveler must provide an itemized receipt detailing each expense to be reimbursed.

-Lodging:

WCU employees are required to use the most economical lodging available. However, lodging costs more than maximum rates are allowed under the following conditions:

- When lodging cannot be located with a reasonable effort within the maximums
- When an employee must stay in a specific hotel where their presence is required by the nature of the official business
- When employees reside at a host establishment while attending a conference or convention on official business

Faculty and staff are **prohibited** from using hosted lodging platforms such as **VRBO and Airbnb** in place of traditional hotel rooms, for University-related travel.

-Meals:

Employees in **overnight travel status** may be paid for the actual cost of means up to the maximum per diem rates established by the [General Services Administration \(GSA\)](#).

Employees are considered to be in overnight travel status if:

— UNIVERSITY POLICY —

1. They are traveling on approved WCU business **and**
2. Away from both WCU or home **and**
3. For purposes of international travel WCU assumes that the traveler is more than 50 miles and one and one-half hours away from home.

The per diem rate covers meals, tips, tax and all other expenses not specifically addressed in this policy, for each 24-hour period spent in a continuous overnight travel status. The travel period begins at any time of day or night that the employee leaves WCU or his/her resident to embark upon overnight travel on official WCU business.

For overnight travel that is not part of a full 24-hour period, the per diem rate will be prorated and rounded to the nearest dollar as follows:

Less than 3 hours	No reimbursement
3 hours to less than 6 hours	25%
6 hours to less than 15 hours	62.5%

Departmental Considerations -- Each department may establish its own policy as to whether they will use the per diem or require receipts for meals.

	Per Diem	Receipts
Itemized Receipts Required	No	Yes

The maximum allowable reimbursement amount must be reduced for meals provided to the employee at no cost, included in a registration fee, conference, facility rental, or the cost of lodging. The maximum amount must be reduced by the following rates:

- o 21% of per diem rate for breakfast,
- o 21% of per diem rate for lunch, and
- o 58% of per diem rate for dinner.

VP-level employees and above may exceed the established per diems and be reimbursed for the full amount of their meals if documentation such as a list of attendees, purpose of event, justification for the meeting of the relationship to WCU business is provided.

-Faculty-Led Student Trips (International):

UNIVERSITY POLICY

Study-abroad programs must be carefully planned to ensure student safety and a rich learning experience. Faculty is encouraged to contact the [Global Engagement Office](#) prior to submitting proposals to facilitate the process.

The faculty member must meet with Business Services no less than 6 months prior to departure to plan for the trip expenses. WCU will make every attempt to pre-pay as much of the trip as possible to limit financial concerns that could arise while traveling.

The following documents are required to be submitted to Accounts Payable during the meeting:

1. Global Engagement Office approval form
2. Study Abroad Program approval
3. Travel Authorization Form
 - Trip itinerary
 - List of students expected to take the trip
 - Estimated amount of total expenses
4. Explanation of funds collection and allocation

WCU will issue a travel card to the faculty/staff scheduled to travel for expenses incurred while on the trip. Cardholders are reminded that the Pcard is to be used for business- related purchases while traveling. In the case of an emergency the card may be used with the permission of the GEO and Business Services. Cardholders must contact the GEO if an emergency arises. The GEO will contact Business Services to secure the additional credit line to cover the emergency expenses.

Advances for foreign travel with students will be considered on a case-by-case basis. The GEO must be contacted to ensure appropriate procedures are followed. AP will work with the GEO to process prepayment of expenses and/or advances. A travel authorization form must accompany the information provided in the initial trip planning meeting with AP and have the appropriate approvals. Additional documentation that must be included with the request are:

1. An itemized list detailing the expenses for the requested advance
2. A list of the students participating

UNIVERSITY POLICY

3. The justification of the trip in connection with WCU business (Course name, credits issued, etc.)

When requesting a reimbursement, the advance should be noted on the Travel Expense Report and deducted from the amount owed to the employee. Only the expenses incurred will be charged to departmental budgets. Any unspent balance of an advance must be returned to AP in the form of a check made payable to West Chester University within 20 days of the conclusion of the trip. No additional travel advances will be granted until a travel expense report is filed to justify the previous advance.

Note: In some cases, a purchasing card will be issued to the faculty member for the specific reason of charging the student expenses. In these cases, no cash advance or reimbursement will be granted to the faculty member.

-Reimbursement Guidelines – Non-Employees:

Reimbursement to non-employees for travel to and from WCU will be made based on approved travel expense reports. The report must be signed by the cost center manager and if possible, the non-employee requesting reimbursement.

No social security number is required for reimbursement of non-employees for travel expenses.

Transportation arrangements:

- Airfare expenses will not be paid in advance. Business Services does not recommend and will not pre-pay airfare.
- WCU travel cards MAY NOT be used to pay for airline expenses.
- The traveler should make reservations and request reimbursement via the [Travel Expense Voucher form](#).

Hotel & Cab Arrangements:

- WCU travel cards MAY NOT be used to hold hotel reservations. Instead, a Candidate Interview Card should be used for hotel reservations.

-Candidate Interview:

Applicants for employment may be reimbursed for the cost of travel in

— UNIVERSITY POLICY —

connection with the interview process. A WCU Candidate Interview Card may be used to secure a hotel room for the candidate and pay for meals with the candidate during the candidate interview process. Please see the WCU Purchasing Card Policy for more information.

References

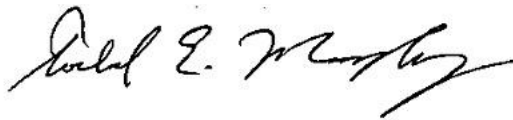
See also WCU Purchasing Card and Travel Card Policy.

Link to [Missing Receipt Form](#).

Reviewed by: Sr. Associate VP for Finance and Business Services, Chief Human Resources Officer, Director of Business Services, Accounts Payable and Card System Manager.

Policy Owner: Nicole Bobbert, Accounts Payable and Card System Manager

Approved by:



Todd E. Murphy

Vice President for Finance and Administration

Effective Date: 8/24/23

Next Review Date: 6/9/27

History

Initial Approval: 4/11/12

Review Dates: 4/8/16, 4/8/20, 1/18/21, 6/9/23

Amended: 4/8/20, 1/18/21, 2/16/23, 6/9/23