SSW Travel & Entertainment Expense Policy – Faculty Field Adviser

Travel is a major expenditure of our program and is an area that the School must continue to review. The following outlines the Travel and Entertainment Expense Policy for the School for Social Work. Note that the School sets policies and allowances and we do not have the same standards as the College in some instances, but forms will be submitted to the College and the College is referenced throughout.

The Internal Revenue Service imposes the following requirements on reimbursement of business expenses:

• There must be a business reason for the expenses.
• The individual must substantiate the expenses.

Responsibilities of Travelers: School funds must be spent prudently. Travel and entertainment expenses will be paid or reimbursed if they are necessary, reasonable, appropriately documented, and properly authorized.

Responsibilities of the School: The responsibility for review and approval of all School’s business, travel and entertainment expenses rests with the Dean, who is fiscally responsible for the accounts to which the expenses will be charged. The Fiscal Affairs Coordinator is delegated to review and process for payment reimbursements for any expenditures. Exceptions to these guidelines must be approved in writing by the Dean, prior to incurring the expense.

Expense Reimbursement Form:
Requests for payments and reimbursements must be completed and signed on the Expense Reimbursement Form. The form must be accompanied by the original receipts (credit card statements are not acceptable as original receipts) and submitted within 30 days of completion of the trip, but not to exceed 150 days. Completed Expense reports should be submitted to Michele Bala.
Note: The School will not reimburse any expenses incurred more than 150 days before the date the request is submitted. All expenses must be documented.

The reimbursement must be completed in full and contain all pertinent information: name, address, Banner ID, travel dates, purpose, destination, signature, etc. Expenses incurred in a foreign currency must be converted to U.S. dollars by spender/traveler. The exchange rate at the time the expense was incurred and the US dollar equivalent must be provided on all receipts. Written documentation must include the exchange rate and date.

The School continues to scan expense reports and supporting documentation. In order to facilitate the scanning of documents, receipts smaller than 8 ½ x 11 should be taped (no staples please!) to a separate piece of white/blank paper with each receipt individually taped: please submit as many taped receipts on one piece of white/blank paper as space allows. Incomplete forms for any reason will be returned, which will delay payment. Please use one form per visit/trip.
Air Travel:
The School will need to enforce air travel policies in line with some of the changes being imposed by the industry. They are as follows:

- **Baggage Fees**: the School will only reimburse for 1 piece of baggage checked. The School **will not reimburse** for overweight baggage.

- **Preferred Seating**: the School **will not reimburse** for preferred seating requests (i.e., aisle seat, wing area, etc.)

- **Change in ticket**: airlines are now charging for a change in ticket and charging a fee to do the recalculation of a new ticket –sometimes up to or over $200. The School **will not reimburse** for ticket changes or recalculations of tickets, so please be sure of your travel plans.

All efforts should be made to obtain the lowest economy/basic fare. Second tier coach fare is acceptable if needed to reserve a seat assignment. The school recommends purchasing 60 days in advance of travel and requires that bookings be made no later than 30 days in advance of travel. All last minute travel needs must be approved by the Director of Field Education. For electronic tickets, please submit the electronic confirmation/receipt that shows your travel plus the amount charged to a major credit card. Itineraries without credit card information included are not acceptable.

Saturday night stay is encouraged when the savings generated exceed the cost of lodging and meals. The College and School do not have an “official” travel agent. The School wishes you to use the best venue of travel booking that will offer the best cost.

If your scheduled travel should be interrupted due to a cancellation by the Carrier and overnight lodging is necessary and not covered by the Carrier, the school will reimburse hotels up to **$200/night** (room rate and taxes). In major U.S. cities like Boston, New York, Los Angeles Chicago, San Francisco and Washington, D.C., the School will reimburse up to **$250-300/night** (room rate and taxes).

Car Rental:
The school recommends purchasing 60 days in advance of travel, and requires that bookings be made no later than 30 days in advance of travel. All last minute travel needs must be approved by the Director of Field Education.

The following should be considered before renting a car:

- Availability of hotel shuttles and taxi cabs

- Airport transports (included at some hotels)

- Proximity of hotel to destination
• Length of stay, and no cost upgrades

While traveling for advising, the School will reimburse for economy or compact car rentals only. If you rent a vehicle while working on behalf of the School, the School recommends that you take out the Collision Damage Waiver (CDW) insurance for the car in case of an accident. **The School will reimburse you for this daily coverage.** It is important to inspect any rental vehicle before you take it and document any damages, dents, scratches, etc. on the rental form. You will not be reimbursed for a car rental when attending yearly meetings on the Smith Campus.

If utilizing private transportation (car service, airport shuttle, etc.) the school will reimburse the lowest cost fare available. For example, if an airport shuttle service has available a shared van and the traveler elects a private car or exclusive-use van, the traveler will only be reimbursed the cost of the shared van rate.

**Personal Vehicle:**
If a personal vehicle is used, the traveler is eligible for mileage reimbursement, which recognizes the cost of gas, oil, normal wear and tear, and insurance. The School reimburses at the rate set by the College, which is usually equal to the standard I.R.S. approved mileage rate. **It is currently at $.58 per mile (as of 1/1/19).**

If you have the Fast Lane mechanism in your vehicle and do not get receipts for these, please note the cost of the turnpike travel and document it as “Fast Lane” on the travel log submitted. When traveling within the Northampton area or to any of the other four institutions within the Five College Consortium, you will not be reimbursed for travel.

Travelers should use taxis or public transportation in metropolitan areas to realize greater savings and convenience (e.g. New York, Boston, Washington, Chicago, etc.).

When you drive your own vehicle on School business, your own insurance policy serves as a “primary” policy for third party liability and physical damage to your vehicle. If your vehicle is damaged as a result of an accident, whether it is your fault or not, your comprehensive/collision coverage of your policy would cover this. The School will not pay for any physical damage to your vehicle – you use it at your own risk. The College is also now requesting, that when traveling by vehicle that mileage documentation for the travel be submitted, **each time.**

Suggested sources for this are Map Quest, Google, Trip Advisor, etc. The start point, end point and total miles must be documented with this trip advisor.

**Lodging:**
The School will only reimburse for single room rates. Many hotels offer conference, corporate or educational rates which should be utilized whenever possible.

The School will reimburse, in most U.S. cities, for hotels up to **$200/night** (room rate and taxes). In major U.S. cities like Boston, New York, Los Angeles, Chicago, San Francisco and Washington, D.C., the School will reimburse up to **$250-300/night** (room rate and taxes). Some SSW events will have further restricted lodging reimbursement rates depending on the event.
Meals and Entertainment:
Reimbursement of meals and entertainment for business purposes will be on the basis of actual and reasonable costs up to a maximum of $65 per day. Costs must be itemized and actual receipts attached for any expense exceeding $25. Travelers should retain all receipts, including expenses under $25, for accurate accounting of expenses. For meals less than $25, receipts are not necessary if noted in an account book or diary. All receipts and a copy of your account book/diary must accompany the expense report. Tips associated with meals are claimed as part of the total meal expense. When dining with others, each person should pay for their own expenses. If circumstances do not permit this, to ensure that costs are properly accounted for, the person paying the entire meal expenditure must report each attendee's name, the business purpose, and matter discussed.

On FFA meeting days where there are meals being provided, we request a maximum reimbursement of $40 for additional meals (and you should only reimburse for meals not provided).