Hamilton College Travel Policy

The Travel Policy has been developed to establish and communicate equitable standards and effective procedures to facilitate travel while on College business and concurrently control our expenditures. The policy applies to all individuals whose travel expenses are paid by the College. Allowable travel expenses typically include lodging, transportation, meals, mileage. Specific requirements and limitations for these are described in this policy. Spousal travel expenses are generally not reimbursed.

Reservations

Employees are encouraged to use BTI, the College's designated travel agency to make reservations. Reservations may be made using the online line reservation system or by phone. Airline reservations made online may be charged directly to the College by entering the appropriate 13 digit account code. Reservations may also be charged to a corporate or personal credit card.

Lodging

Travelers on College business are expected to use good judgment in securing hotel/motel accommodations which are most economical to the total cost of the trip from both a rate and location standpoint. Overnight accommodations at a hotel should normally be at the minimum single rate.

Employees staying in hotels in states which exempt the College from sales tax should notify the hotel they are on College business and provide a copy of the College’s tax exempt form. Hamilton College is exempt from sales tax in New York and several other states. The New York exemption form and information regarding other state exemption forms are here.

Employees must attach a copy of the hotel invoice with detail of charges to their travel expense report to adequately substantiate the cost of lodging. Sales tax charged by hotels in New York State is considered unallowable since it is the employee’s responsibility to notify the hotel of the College’s tax exempt status.

There may be situations in which an employee can save money on lodging by booking a room through a website such as Hotwire and sites such as these will always charge sales tax regardless of tax exempt status. If an employee uses Hotwire to pay for lodging in a state which exempts the university from sales tax, the employee may be reimbursed for such sales tax if they provide documentation that their total lodging costs were less than the amount that would have been paid if booked through the online reservation tool available through BTI. A print screen of the hotel options and pricing offered by BYI for the travel destination will be considered adequate documentation.

Gifts in Lieu of Lodging
Expenses for modest gestures of appreciation for individuals who provided lodging to a College employee traveling on college business may be an allowable traveling expense unless the travel is to be charged to a federal grant or contract. The expense must be substantiated with a detailed receipt describing the item and include a brief explanation.

**Train, Air Fare and Rental Cars**

Travelers should utilize rental agencies with which the College has negotiated discounted pricing. Information on such agencies is available at https://www.hamilton.edu/offices/auxiliarservices/travel/rental. If using the BTI Reservation System, these discounted price options will be automatically provided.

College employees should purchase tickets that provide the greatest economic benefit to the University. This requires flying coach, and may require flying discount airlines rather than those in which an employee may be enrolled in a frequent flyer or similar program.

If a personal vehicle is used to travel to a single destination, the mileage allowance should not exceed what the cost of what air fare would be for travel to that destination.

**Mileage Allowance**

Employees using their personal vehicle for business travel may claim mileage allowance which is currently approved at 54.5 cents per mile. The allowance is intended to cover all operation expenses such as insurance, gasoline, oil, tire and engine repair and maintenance. Costs of tolls and parking fees are reimbursable and not included in the mileage allowance.

**Travel Cards**

Corporate travel cards are available to College employees who travel frequently on College business.

As a tax-exempt organization, the College may be exempt from sales and similar taxes in most jurisdictions. Corporate travel credit cards include the College’s tax exempt number though some venues require a copy of our tax exempt certification. Employees are expected to take advantage of the College’s tax-exempt status where ever possible.

**Personal Travel**

Employees may at times combine personal travel with business on a single trip. If a traveler takes an indirect route in order to include personal travel, the allowable expense which may be charged to the College is the cost of the direct route and the employee is responsible for any excess cost. Expenses incurred during the personal travel portion of a business trip are the responsibility of the employee and not to be charged to the College.

**Meals & Entertainment**

A $50 daily per diem is normally permitted for meals when an employee is traveling on business for a full day. The general allocation of the per diem is $10 for breakfast, $15
for lunch, $25 for dinner. The daily per diem for faculty involving more than 7 days of travel is $25.

Employees electing the per diem are not required to submit receipts for meals.

Employees may submit receipts for meals rather than requesting the per diem. Receipts must be itemized receipts listing items served, not credit card receipts. The typical restaurant tip for good/excellent service ranges between 15%-20% and cannot exceed 20% of the bill to be reimbursed by the College.

Reimbursement for alcohol beverages are allowed only during authorized entertainment events; however, Hamilton employees are expected to maintain professional standards of conduct at all times and are personally responsible and accountable for their behavior. Expenses associated with authorized entertainment events are those for food, beverages, and social activities incurred while conducting College business with individuals who are not College employees such as job candidates, donors, students, parents, etc. Reporting of entertainment expenses must include information describing the names of individuals being entertained and the business purpose of the meal or event.

Meal expenses not involving an overnight trip may be reimbursed, but are generally not considered tax exempt. If an employee submits an expense report for meals not involving overnight travel, the appropriate payroll taxes will be withheld from the employee’s next salary payment.

In order for expenses of meal costs without involving overnight travel to be considered tax exempt, the following criteria are required.

1. The meal is provided on an occasional basis to allow the employee to work overtime.
2. The meal qualifies as a legitimate business expense, i.e. University business is conducted during the meal.
3. The applicable division VP signs off on the expenditure as meeting the standard in #1 or #2, above.

Travel Advances

The College will provide cash advances to faculty, staff, and, on occasion, students traveling on authorized College business to pay for out of pocket costs which cannot be paid by credit card or directly paid by the College. The size of the advance must be a reasonable amount for the length and location of the trip and may not exceed $500. Each cash advance is the personal obligation of the traveler; therefore, the traveler is responsible for any lost or stolen cash advances as well as providing receipts documenting the utilization of the funds.

Travel advances may be requested by submitting an approved check request form to the Business Office. If the employee is enrolled in direct deposit for Accounts Payable
through WebAdvisor, the advance will be automatically deposited to the account. Otherwise a check will be issued for the advance. Approved payment requests with all required information received by Monday at 4 PM will be issued on the following Friday.

An approved expense report must be submitted to substantiate the expenses paid with the advance within 20 business days after the trip. Any advance funds not used must be returned with the report. If an expense report to clear an advance is not received within the required time frame, the Business Office will send a reminder. An advance not accounted for with an expense report within 90 days will be reported to the appropriate vice president. If the advance remains unaccounted for and after 120 days, the entire advance will be deducted from the employee’s next pay period. Appropriate payroll taxes will be withheld in the employee’s next salary payment.

Employees may not have more than one travel advance outstanding at any time. Reimbursements for other business expenditures and additional advances will not be made until the prior advance is substantiated.

**Travel Expense Reports**

Employees must receive approval from their supervisor for college business travel in advance of the trip. Upon completion of travel, employees must prepare travel and entertainment expense reports to substantiate all travel expenses paid by the College which must be approved by the appropriate responsible persons. The appropriate responsible person must be a College employee with budget authority for the accounts being charged for the travel that has a higher level of authority than the traveler. Travel expenses in excess of $2,000 per report must be approved by the applicable division Vice President. Senior staff members travel expenses may be approved by the President or the VP of Administration and Finance, at the President’s discretion. With the exception of the VP for Administration and Finance, employees may not approve travel expense reports for their supervisors.

Travel expense reports submitted for reimbursement or to substantiate a travel advance must be submitted to the Business Office within a timely manner, generally 20 days within completion of the trip.

Examples of non-allowable travel expenses which are not to be charged to the University include:

- Lost or stolen property, tickets, cash
- Alcoholic beverages unless for authorized entertainment events
- Damage to personal vehicles, clothing or other items
- Fines, parking tickets
- Movies, including those charged to a hotel bill
- Expenses for family, spouses, and companions traveling with the employee unless there is a legitimate and approved business purpose.
- Extra baggage fees
- Travel insurance

### Insurance

Information regarding insurance while traveling is available at [https://www.hamilton.edu/offices/auxiliarservices/travel/insurance](https://www.hamilton.edu/offices/auxiliarservices/travel/insurance)

If an employee’s car is damaged while traveling on business, the College may reimburse the employee for their insurance deductible amount up to $350, depending on fault and circumstances. If an employee traveling on College business is involved in an accident which causes injury or property damage to a third party, the employee’s personal insurance will apply first, and, on a case-by-case basis, the College’s insurance may supplement.

The College does not provide insurance for loss or damage to personal property, either at work or while traveling on University business. The loss of College property while in a vehicle may be covered dependent on the value. However, it is the responsibility of the employee to safeguard College property and leaving property unattended in a vehicle may be considered negligent and the employee may be responsible for reimbursement to the College.

### Sales Tax Exempt Certificates

Several states have granted the College tax exempt status and service providers such as hotels will generally waive sales tax if provided with the tax exempt certificate issued to the University by their state with proof the expense is for university business. Many vendors require the bill be paid with a university corporate card as proof the expense is for university business. Whenever possible, employees should request the sales tax be waived when paying travel costs for university business.

The New York exemption form and information regarding other state exemption forms are [here](https://www.hamilton.edu/offices/auxiliarservices/travel/insurance).

### Foreign Travel

Employees traveling to foreign countries are encouraged to review the rules and benefits offered by the College’s [International Packet](https://www.hamilton.edu/offices/auxiliarservices/travel/insurance) of its insurance program.

All expenses incurred on foreign travel should indicate the exchange rate in effect during the travel period and the traveler’s expense report must report expenses in U.S. dollars. Employees needing assistance in converting their foreign expenses to U.S.
dollars may contact Accounts Payable and/or use an online currency conversion tool at www.xe.com.

Travel using Sponsored Funds

Sponsored funds are those funds received by the university to finance a specific project or grant and the sponsoring agency is frequently a governmental entity. In some cases, the sponsoring agency has specific requirements in regards to travel expenses. In order to ensure the university meets all such requirements, travel supported by sponsored funds must comply with the College’s Travel Policy and Procedures, the terms of the award, and all applicable regulations; when there is disagreement among these, the most restrictive guidance applies. It is the Principal Investigator/Project Director’s responsibility to ensure compliance with regulations relating to travel charged to sponsored funds, including specific rules relating to travel charged to federal awards. Rules for travel charged to federal funds include but are not limited to the following:

- Alcoholic beverages, even those that are part of meals, cannot be charged to federal funds.
- When travelling on federal funds, travelers are required to select the least expensive airfare class offered by an airline (i.e. economy—not first class, business-class, upgraded economy, economy comfort, or exit row seating upgrades).
- Travelers are required to use U.S. flag air carriers for international travel, regardless of cost or convenience, for federally funded travel.

Employees should consult Jeff Ritchie, the Director of Sponsored Programs, before booking travel to be charged to any federal grant.