

Procedure III.3001.G.a, Employee Travel

Associated Policy

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Procedure

Overview

San Jacinto College travel must be for official College business. This procedure includes descriptions of authorized travel expenditures, restrictions, and specific procedures for the purchase and processing of travel reimbursements and payments. Travel reimbursements and payments shall be consistent with all College, state, and federal (when applicable) policies, procedures, and guidelines pertaining to travel. The approved methods of payment for registration and travel expenses include a purchase order, direct pay invoice, P-card, or use of personal funds. The use of third-party booking websites or services is prohibited for all travel related expenses.

All employees are responsible for reviewing travel procedures prior to travel. All travel arrangements should be made using the most cost-efficient method available, as well as exercising care to avoid impropriety or the appearance of impropriety.

Unauthorized travel expenses are the sole responsibility of the employee.

Travel Definitions

Intercampus or local travel. Travel between campus locations or other business-related travel that is less than 150 miles round trip and does not require an overnight stay.

Long-distance day travel. Travel that exceeds 150 miles round trip completed in one day.

Overnight travel. Travel that extends beyond one day and requires an overnight stay without returning home.

International travel. Travel outside the US.

Non-continental US travel. Travel to Alaska or Hawaii.

Required Travel Approvals

All long-distance day or overnight travel must be approved in advance utilizing the [Request for Travel Approval form](#).

Required Approvers:

First level leader. If the leader is not the budget authority, the form will proceed to the next-level leader(s) until approved by the budget authority.

Additional approvals are required if travel is funded from one of the sources listed below. International and non-continental US travel also requires additional approvals as noted below.

- Office of Grants Management – if using grant funds
- Center for Excellence in Teaching and Learning (CETL) – if using Distinguished Faculty Level Gold funds
- International travel and non-continental US travel – respective Strategic Leadership Team (SLT) member and Chancellor

San Jacinto College employees may not approve their own Request for Travel Approval form.

The Request for Travel Approval form must be fully approved prior to commitment of any funds.

Methods of Payment

- The traveler may use one of the following methods for payment:
 - Purchase Order
 - Direct Pay Invoice – Complete through Banner Finance payable to the conference or sponsoring organization.
 - Procurement Card (P-card). P-card procedures can be found on the [internal website](#).
 - Personal credit card with a subsequent request for reimbursement
- Documentation for each of the payment methods must include:
 - Dates and location of the conference, meeting, or other event
 - Title of the event
 - Name of the attendee
 - Registration form, invoice, or other information related to rates and included amenities
 - Copy of approved Request for Travel Approval form

Travel Expenses

Registration and Conference Fees

- Completion of the Request for Travel Approval form is required for conferences/meetings/events that require long-distance day or overnight travel.

Airline

- Employees should plan their travel with enough time to obtain the most economical rate. Reservations should be made at least 21 days in advance, unless extenuating circumstances exist (e.g., last-minute attendee substitution or last-minute supervisory request). International flights may require a longer lead time.

- Allowable airline fare categories are those at the lowest available price that allow a carry-on bag and the option for seat selection at no additional charge. Baggage fees are also allowable and covered in a separate section below. Upgrade fees for conveniences such as extra leg room or preferred seating closer to the front of the aircraft are not allowed unless the traveler has an approved exception in writing/on record prior to booking the flight. Approved exception documentation must be included with the employee's Travel and P- card Expense reports. Less expensive fare types are encouraged when practical.
- Use of third-party booking websites or services is prohibited.
- The purchase of fully refundable tickets is prohibited.
- Ticket changes that result in a higher fare are only allowed if resulting from a valid business reason, pre-approved by the budget authority, and documented in writing.
- Travel one day prior and/or one day post conference/meeting/event dates may be allowed if reasonable flight accommodations are not available for same-day travel or due to employee safety concerns.
- Airport Parking. Offsite parking is encouraged where available and safe due to the cost savings; however, parking charges up to the daily amount for terminal parking is allowable. Reservations for terminal parking are highly encouraged to take advantage of available discounts. Valet Parking will only be permitted if condition is documented in the employee's file with HR/Benefits.
- Priority Boarding/Preferred Seating/Upgrade fees. Only permitted if condition is documented in the employee's file with HR/Benefits, or the employee has an exception approved in writing by their SLT member before booking the flight arrangements. No-cost upgrades are acceptable if documentation clearly indicates there was no additional fee incurred. If airline utilized does not charge a baggage fee, a priority boarding/preferred seating fee may be allowable to the extent it does not exceed the normal baggage fee charged by most airlines.
- Baggage fees. Baggage fee for one (1) bag is allowed. Charges for additional or heavy baggage due to College-related business (e.g., College owned equipment, demonstration materials) is allowed with leader's approval.
- Internet charges to conduct college business while in flight are allowable if approved in writing by leader prior to the flight.
- Airline reward miles earned on business flights paid for by the College and vouchers provided to employees for delayed flights or other inconveniences while traveling for College business are considered the employees' and can be utilized as the employee deems appropriate, including personal travel.

Fly vs. Drive

- If a trip is 250 miles one way or more, the most economical means of travel is usually to fly, so that is the preferred method of travel unless there are other factors that make driving a better option for the department and traveler.
- For travel less than 250 miles one way, employees may use their personal vehicle or a rental car for travel. Traveler should compare the cost of mileage reimbursement or rental car costs vs. the cost of allowable airfare, plus any related local transportation expenses.
- Mileage for use of personal vehicle will be reimbursed at the Internal Revenue Service (IRS) mileage rate in effect at the time of travel. If travelers choose to use their personal vehicle for the trip, additional costs for food or lodging incurred while driving are not reimbursable if they exceed reasonable expenses incurred for air travel.
- If employees receiving travel stipends use their personal vehicle for the trip, they will be reimbursed for mileage as specified above since the travel stipend is predominately for intercampus or local travel.
- If an employee chooses to rent a car and the total cost (rental car and fuel expense) is anticipated to exceed the cost of using a personal vehicle (mileage reimbursement) or flying (airfare and related local transportation expenses), the employee should pay out-of-pocket for the rental car and fuel expense. Reimbursement will be the lesser of the mileage rate, airfare, and related transportation expenses or the combined rental car and fuel expense.

Ground Transportation, Mileage, Parking, and Tolls

- Ground transportation includes shuttles, taxis, buses, ride-sharing services, and rental vehicles.
- For business travel in a destination city to/from a hotel, conference, or other business point, travelers may be reimbursed for actual expenses for the most cost-effective, appropriate method of ground transportation, such as taxi, UBER, LYFT, or limo service (including reasonable tips), shuttles, or other public transportation.
- Car rental and fuel for travel in a destination city may be allowed only if it is documented that this is the most cost-effective, appropriate method of transportation. Any upgrades will be at the employee's personal expense.
- Fuel reimbursement is only allowed for rental vehicles or use of College-owned vehicles. Mileage reimbursement is utilized for use of a personal vehicle.
- Parking expenses incurred while traveling for business are allowable. Valet parking is not allowed unless appropriate justification is provided. Examples of limited exceptions are when no other safe option exists or a condition is documented in the employee's file with HR/Benefits.
- Tolls incurred while traveling for business are allowable. Receipts are required when requesting reimbursement.

Important Car Rental Considerations

- State or cooperative contracts should be utilized for car rentals when available. These contracts and other important information about renting vehicles is included in the Vehicle Rental Handbook at the link below. Consult this [handbook](#) before making car rental arrangements.
- When using state-approved vendors, insurance coverage for collision damage waiver (CDW) or loss damage waiver (LDW) may already be included in the rental fee. If CDW or LDW are not included in the rental fee, the supplemental insurance coverage should be purchased, even if using a non-state approved vendor. Be sure to check the language in the rental contract.
- The use of third-party booking websites or services is prohibited.

Lodging

- Employees should select the conference hotel or the most economically priced, suitable lodging closest to the conference/meeting/event location.
- If not staying in a conference hotel at the conference rate, provide the General Services Administration (GSA) [rate](#) to document the reasonableness of the nightly rate for the leader's consideration during the approval process.
- Allowable incidental charges incurred as part of the hotel bill may include parking, internet, and phone expenses when incurred for business purposes.
- Valet Parking is not allowed unless appropriate justification is provided. Examples of limited exceptions are when no other safe option exists, or a condition is documented in the employee's file with HR/Benefits.
- Personal expenses will not be allowed and should not be submitted for reimbursement or charged on the P-card. Personal expenses include, but are not limited to, movie rental, alcohol, laundry charges, gym expenses, and personal calls.
- Lodging will not be provided for employees attending seminars in the Houston metropolitan area (defined as less than 75 miles from the employee's assigned work location) without prior written justification and approval.
 - Examples of allowable exceptions include: (1) late night travel is required; (2) employee is a host committee member and requires onsite attendance; (3) travel would restrict participation in professional development activities.
- For hotels within Texas, use of a Texas Hotel Occupancy Tax Exemption [Certificate](#) is required. All charges incurred for failure to utilize the form are the employee's responsibility.
- Only commercial lodging establishments should be utilized. The rate should be the lowest rate appropriate, which may be the listed Government Rate.
- Rental of privately owned lodging is not permitted (e.g., Airbnb, Home Away, VRBO).

- The use of third-party booking websites or services is prohibited.

Meals

- Meals are allowable for travel that includes an overnight stay. Meals for one-day long- distance travel are not paid by the College to avoid tax implications to employees per IRS guidelines. An exception occurs when an employee is traveling with students; the employees' meal is allowable when the students are being fed in the same setting.
- SJC will reimburse actual meal expenses up to a maximum for the entire trip of \$61 per day times the number of days of travel, inclusive of tips and tax.
- Itemized meal receipts must be submitted with P-card expense reports or direct pay reimbursement requests.
- Purchase of meals for non-College employees while traveling on official College business is prohibited.
- If the hotel, conference, or event registration fee includes meals, the traveler is highly encouraged to take advantage of these meals versus incurring additional meal expenses.
- If a P-card is utilized for meal purchases, the employee is required to reimburse the College for all meal charges in excess of the maximum allowable for the trip as defined above and will result in the issuance of a P-card noncompliance notice. Upon completion of the trip, funds owed to the College can be deducted from the amount of reimbursement owed to the employee or must be repaid within thirty (30) calendar days.

Costs for Extended Trips with Personal Days

- Employees should pay for any personal portion of costs separately.
- Mixed costs that cannot be paid separately should be paid with personal funds, and then employees can request reimbursement for the allocable business portion.

Intercampus or Local Mileage, Parking, and Tolls

- Intercampus or local mileage will be reimbursed at the IRS mileage rate in effect at the time of travel.
- An intercampus (includes annex locations) mileage [matrix](#) is available on the internal website. For local destinations not included in the matrix, use an internet map site (e.g., MapQuest, Google Maps, Yahoo). Employees who receive travel stipends should not request reimbursement for mileage or tolls when traveling locally or between campuses.
- Mileage reimbursement requests for instructors teaching courses at extension centers will require the beginning and ending dates of their courses.

- Only mileage that exceeds the standard commuting distance (home-to and from-work) is eligible for reimbursement.
- Parking expenses incurred while traveling for business are allowable. Valet parking is not allowed unless appropriate justification is provided. Examples of limited exceptions are when there is no other safe option, or a condition is documented in the employee's file with HR/Benefits.
- Tolls incurred while traveling for business are allowable. Receipts are required when requesting reimbursement.

Incidental Expenses

- Reasonable incidental expenses may be allowable with proper documentation (including receipts).
 - Instructional supplies, photocopying (if necessary, for College business travel)
 - Gratuities for transportation, meals, hotel staff, etc.

International Travel

- Must be approved by respective SLT member and the Chancellor.
- International travel insurance must be coordinated with SHERM.
- Use of College-issued technology must be coordinated with ITS.
- Traveler must sign the International Travel Assumption of Risk and General Acknowledgement Employee form.

Travel Cancellations

- Cancellation at traveler's discretion. The employee must reimburse the College within 30 days of travel cancellation for any travel expenses paid with College funds.
 - Leader must complete the Employee Reimbursement to College Voucher, which is discussed below.
 - Exceptions may be available in accordance with existing HR policies.
- Cancellation due to College action. No action unless the College paid the expense and a credit has been issued to the employee by the vendor, then the following will apply:
 - Travelers will inform their leaders of the credit value and the expiration date.
 - The credit should be applied to future College travel prior to the expiration date if applicable. Employees to provide documentation of the applied credit to their leader.
 - If the credit is not used by the expiration date, no further action is required.
 - While this practice is not encouraged, if the credit is used for personal travel, the employee must reimburse the College.

Travel Reimbursement Process

Employees will be reimbursed for reasonable and necessary expenses incurred for official and approved business travel.

Reimbursement of approved out-of-pocket travel-related expenses is allowed if such expenses were not charged on a P-card or reimbursed by an alternate funding mechanism.

Reimbursements for previous fiscal year expenses will not be accepted after September 21 of the following fiscal year.

Traveler will complete the Travel Expense Report (Excel or SmartSheet) within 45 working days of completion of travel, or earlier, to align with the PCard reporting cycle. The Travel Expense Report must be submitted to the approving authority with the following:

- Approved request for Approval of Travel form (not required if the SmartSheet Travel Expense Report is utilized)
- Copy of all receipts (P-card, direct pay, and personal paid receipts)
- Leader will review and compare the Travel Expense Report to estimates on the Request for Approval of Travel form.
- Unallowable expenses will be identified and discussed with traveler.
- If an amount is owed to the College, the leader will reduce the Travel Expense Report form appropriately to adjust the reimbursement to the employee. If there is not enough to cover the adjustment, the leader should submit the Employee Reimbursement to College Voucher to the District Accounts Receivable office so the amount due from the employee can be recorded. Specific instructions are contained within the Travel Expense Report form and the Employee Reimbursement to College Voucher, both of which can be found on the College's internal website under Forms/Documents and Travel.
- The employee will be provided a copy of the Employee Reimbursement to College Voucher from their leader and should submit payment within 30 days at any campus business office.
- Collection efforts will be made on unpaid balances.
- If amounts are owed to the employee, the Direct Pay process shall be followed to initiate reimbursement. Specific instructions are contained within the Travel Expense Report form.

Exceptions

All requests for exceptions must be made in writing and approved by the appropriate SLT member in advance of making the travel arrangements. Exceptions should provide justification for the departure from the approved procedure.

Consequences for Non-compliance

Failure to comply with the San Jacinto College Employee Travel Policy and Procedures may jeopardize an employee’s reimbursement for travel expenses or may require repayment to the College for non-compliant charges on a P-card. Consequences for non-compliance may include, but are not limited to:

- Denial of reimbursement
- Suspension and/or permanent revocation of P-card privileges
- Payroll deduction if non-compliant P-card charges are not reimbursed prior to the close of the current fiscal year
- Mandatory re-training
- Revocation of travel privileges
- Disciplinary action in accordance with San Jacinto College policies and procedures up to and including termination of employment

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Effective Date	May 21, 2024
Associated Policy	Policy III.3001.G, Employee Travel
Primary Owner of Policy Associated with the Procedure	Vice Chancellor, Fiscal Affairs
Secondary Owner of Policy Associated with the Procedure	Associate Vice Chancellor, Finance