

# Travel and Entertainment Guidelines

## *College of Arts and Sciences*

Please review WMU Travel Policy and Procedures & Expense Reimbursements for complete university policies located at the WMU Travel Policy site: <http://wmich.edu/travel>, the Accounts Payable site: [https://wmich.edu/sites/default/files/attachments/u332/2015/ap\\_proc.pdf](https://wmich.edu/sites/default/files/attachments/u332/2015/ap_proc.pdf), as well as Vice President for Academic Affairs site at: <http://www.wmich.edu/provost/manual>.

*The College of Arts and Sciences will follow all university policies.*

### GENERAL TRAVEL AND ENTERTAINMENT POLICIES

- **Travel Authorizations must be completed before travel occurs.** *Payment will be declined if permission is not secured prior to travel.*
  - Travel authorization forms should be submitted at least two weeks in advance.
  - The PeopleSoft system will not allow the submission or processing of a travel authorization once travel has commenced.
  - The travel authorization number must be on the Travel Voucher.
  - Travel authorization must include the absence from class plan in the notes section.
- **All Vouchers must be submitted within 30 days** of the last date of travel, purchase or event.
  - Payment will be declined after the 30-day deadline.
  - This applies to both generic and travel vouchers.

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**TRAVEL AUTHORIZATION forms must clearly describe the reason for the planned travel.** The authorization should include detailed remarks (e.g. name of conference, whether presenting a paper, dates of conference, etc.). If travel is planned for a period exceeding that required for the work-related travel, the travel authorization should explicitly state this, and should also indicate that the traveler will cover additional travel time using private funds.

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### AIR TRAVEL

- Employees must book Air Travel with WMU's travel agency, AAA Travel.
- Non-university employees are not required to use AAA Travel agency (such as students or guests), unless being reimbursed using university funds.
- Local mileage to the Kalamazoo airport is not reimbursable for faculty and staff.

### GROUND TRAVEL (see also: <http://www.wmich.edu/travel/ground-travel/ground-traveling/rental-car>)

- No mileage reimbursement is allowed for local travel (e.g., to run errands in Kalamazoo).
  - An email or verbal notification from a supervisor confirming the need to conduct business off-campus is adequate approval.
- Multiple trips for university business are allowed with a blanket travel authorization.
  - Include a log of mileage with travel dates for multiple trips.
  - Blanket travel authorizations should be limited to one year or less and should not cross fiscal years. However, exceptions to this may be requested for grant-funded travel.
  - Blanket travel authorizations must be limited in scope and purpose (e.g., recruiting).
  - Reimbursement for travel on a blanket TA is best done periodically; at a minimum, reimbursement for each trip must be sought within 60 days.
- Rental versus personal car. A rental car is often less expensive than using a personal car for a day trip. Please consider using a rental car if this is the less expensive option.
  - Rental cars are covered under the University's coverage for both liability and physical damage.
  - Physical damage insurance for personal cars used on University business is not provided.

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- See WMU Travel policy for more details on rental and personal car liability and insurance.
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### **All Activities (On or Off Campus):**

- Submit an Academic Event form for off-campus events at which any of the following applies:
    - No University business is conducted
    - Non-WMU people are involved
    - The nature of the activity is celebration or recognition
    - Alcoholic beverages will be served
    - Anticipated event costs exceed \$1000
    - The dean or associate provost is the honoree or will receive personal reimbursement for event costs
    - See: <https://www.wmich.edu/sites/default/files/attachments/u5/2014/event-approval-request-form.pdf>
  - Every effort should be made to host celebrations, retirements, retreats and award events, including end of the semester award ceremonies, on campus. For events planned for off campus locations, please be prepared to justify the decision (e.g. cost effectiveness, an event held in conjunction with another event, or other unique circumstances).
  - Event forms do not need to be submitted if a few faculty members take a speaker or job candidate out for a meal. However, if the whole department is invited, an event form must be submitted.
  - Reimbursement requests for expenses associated with Holiday parties are highly discouraged.
  - Alcohol should not be served at an event if students are in attendance.
  - A fund 24 should be used for alcohol, and reimbursement for alcohol is limited to 1-2 drinks per person.
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### **Off Campus Activities**

- Off campus business or entertainment meals are not reimbursable if no external guests are in attendance.
  - University policy requires that restaurants be “conservatively” priced. Reimbursement will be approved at the *per diem* rates. If it is anticipated that costs will significantly exceed the *per diem* rates, please seek written permission from the dean’s office in advance of the activity.
  - Classes should not meet off campus at a restaurant unless required as part of the course curriculum.
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### **On Campus Activities**

- No-cost events on campus do not require an Event form.
- Please note that ‘on campus’ includes WMU regional campuses.

### **Event Authorizations—General Information**

- Academic Event Approval Request forms should be submitted 2-3 weeks in advance to allow sufficient time for processing by both the Dean’s and Provost’s Offices.
- Reimbursement:
  - Vouchers must state the purpose of the event and must include a copy of the Academic Event Form.
  - The names and affiliations of guests should be included with the reimbursement request.
- See Academic Affairs policies for additional details: <http://www.wmich.edu/provost/manual>

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### **Faculty and Staff Travel and Entertainment**

- Faculty with IDC accounts must follow ORI's IDC policy. See guidelines at: [https://wmich.edu/sites/default/files/policies/pdf/policyforuseof\\_fanda\\_funds\\_2011.pdf](https://wmich.edu/sites/default/files/policies/pdf/policyforuseof_fanda_funds_2011.pdf)
  - Travel authorizations are not necessary for employee travel of a personal nature that will *not be reimbursed*. Only direct supervisor approval is required.
  - Faculty should plan travel so as to limit absence from teaching and mentoring responsibilities.
    - Faculty must input the absence from class plan in the notes section of the travel authorization.
    - Approval of the travel authorization by the department chair/director is also approval of the absence from class plan.
  - Hotel and meal charges will be paid for the *duration* of the conference plus appropriate travel time.
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### **Student travel**

- A copy of the Clery Form must be submitted with the travel voucher.
    - Departments must submit the original Clery Form to Public Safety.
    - See: <https://www.wmudps.wmich.edu/clery-student-off-campus-trip-policy.php>
  - Student travel on university business (i.e., presenting a paper or poster at a conference, representing a CAS department and WMU) is reimbursable with a voucher.
  - Student payments for educational enrichment (i.e., attending a conference for the educational experience and not presenting) are to be paid through financial aid.
    - See guidelines from financial aid website: <https://wmich.edu/finaid/pdf/fact-sheets/APFAStudents.pdf>.
    - For further questions regarding reimbursement, please contact the Dean's Office well in advance of the planned travel.
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### **Guests of CAS**

- Independent contract agreements must be approved in advance by Business Services for reimbursement to guests being paid an honorarium.
  - Travel reimbursement and honoraria can be paid on the same invoice.
  - Payment to independent contractors requires a W-9 or W-8BEN form by guests or businesses who have not been paid previously from WMU.