

R·I·T | CIAS Guideline

Faculty and Staff Travel Reimbursement

CIAS adheres to the guidelines outlined in RIT's Travel Policies and Procedures Manual which can be found online at: <http://www.rit.edu/fa/controller/travel> and http://www.rit.edu/controller/payable/discretionary_expenditures.html#a.

All employees in CIAS are required to review the RIT travel policy and obtain signature pre-approval before making any travel arrangements. In accordance with RIT policies, CIAS has compiled the following guidelines for its oversight of individual employee travel and reimbursement.

Faculty and staff must work with their Senior Staff Assistant to complete the **online version** of the **Travel Expense Report (TER)** for all travel involving flights and/or an overnight stay. The **online version** of the Travel Expense Report (TER) resides online within Oracle. After receiving the organized and complete travel documentation, the Senior Staff Assistant enters the traveler's trip information into Oracle on the traveler's behalf. This process ensures that the information is entered correctly and that reimbursements are processed in a timely manner.

This will require each faculty/staff member to provide their Senior Staff Assistants Access Authorization in Oracle. Instructions for adding **Access Authorizations** in Oracle:

1. Visit **Oracle** login page: <https://myinfo.rit.edu>
2. Login and select "RIT Reimbursement for Travel"
3. Select "My Expenses Home"
4. Select "Access Authorizations"
5. Add another row
6. Type in staff assistant's last name and run a search
7. After adding all names, click the "SAVE" button

Through Oracle, under "Access Authorizations" for both TRAVEL and EXPENSE Reimbursements, please add the following individuals:

- Senior Staff Assistant **Grace Gladney**
- Senior Project Assistant **Michele Washburn**
- Assistant Dean of Administrative Services **Clare Lagiewski**
- Administrative Coordinator, **Andrew Schubart**
- Their school's **Senior Staff Assistant**

I. General Guidelines for CIAS Faculty and Staff Individual Travel

- A. **PNC Travel and Entertainment Cards:** All CIAS faculty and staff who travel for professional purposes are strongly encouraged to apply for and obtain their own personal PNC Travel and Entertainment Card in order to streamline accounting processes. Instructions and the required form can be found here: <https://inside.cias.rit.edu/ciasforms/>
- B. **CIAS Faculty /Staff Travel Pre-Approval Form:** <https://inside.cias.rit.edu/ciasforms/>
This form must be submitted to your Administrative Chair or Supervisor at least one month in advance of travel.

- C. **Conference/Registration Fees** must be made with the School's procurement card. Original proof of purchase must be submitted to the faculty/staff member's Senior Staff Assistant twice; first at the time of initial purchase, and another copy along with other trip receipts upon completion of travel.
- D. **Cash Advances** require pre-approval accompanied with appropriate forms (i.e. National Portfolio Days Travel Form). Cash advances must be requested from the School's Senior Staff Assistant at least three weeks prior to the departure date.
- E. **Airfare and Hotel Reservations** should be booked through one of RIT's designated travel agencies such as Tzell. When calling to make travel arrangements:
- Identify that you are a RIT employee.
 - Provide your RIT University ID (UID) number.
 - For flights, the cost will be directly billed to RIT. However, for reconciliation, all flight receipts must be printed out and submitted to the Senior Staff Assistant with all other travel receipts.
 - For lodging, you must use your Personal Credit Card or preferred PNC Travel and Entertainment Card.

If an on-line travel website (Expedia, Orbitz, etc.) is used, the traveler will need to wait for reimbursement until after the trip is completed and all receipts are processed. Regardless of method used, original proof of payment is required. **When using online travel sites, travelers must obtain an itemized bill directly from the hotel in addition to the receipt provided by the travel site.** RIT does not reimburse for trip cancellation insurance.

- F. **Meals:** There are multiple meal reimbursement options for employees whose travel includes an overnight stay. Refer to the table below for details:

Option	Description	Daily Max	Other Information
1	Domestic per diem method	\$41.00	Must deduct for conference meals and time of departure and return (refer to item 5 below) from daily max
2	Standard domestic method	\$56.00	Original, itemized receipts required
3	High-cost cities method	\$66.00	See item 3 below
4	International per diem method	\$78.00	Must deduct for conference meals and time of departure and return (refer to 11.e. below) from daily max
5	International method	\$125.00	Original, itemized receipts required

1. Choose one reimbursement option per trip (i.e., EITHER per diem or actual receipts); do not combine reimbursement methods.
2. The tip is considered part of the total meal expense.
3. Refer to the list of major **U.S. metropolitan (high-cost) cities** (<https://www.rit.edu/fa/controller/sites/rit.edu/fa.controller/files/files/docs/Major%20Metro%20Cities%20.pdf>) referred to in reimbursement option 3 in the table above.

4. The use of RIT's sales tax exemption certificates is encouraged; however, it is often not practical to request an exemption for small dollar meal purchases. Therefore, individual meals of \$25.00 or less will be reimbursed including sales tax paid without a justification or explanation.
5. Faculty/staff traveler must inform their Sr. Staff Assistant which days involve deductions from overall meal allowance due to situations such as meals included in the conference fee or actual time of departure/return. Refer to the table below for details:

Adjustments for Conference Meals and Time of Departure/Return			
Domestic		International	
Breakfast	\$ 7.00	Breakfast	\$13.00
Lunch	\$11.00	Lunch	\$21.00
Dinner	\$23.00	Dinner	\$44.00
Total	\$41.00	Total	\$78.00

6. Alcohol taken with meals is not a reimbursable expense per **RIT's discretionary policy** (https://www.rit.edu/fa/controller/payable/discretionary_expenditures.html). If alcohol is listed on a receipt, traveler must circle each occurrence, and remove cost from the total.

G. Automobile Travel

1. **Private Vehicles** can be used only if the itinerary or other aspects of University business make it the most practical method of travel.
 - a) RIT's reimbursement for automobile travel for business is based upon the current RIT business mileage reimbursement rate. For rate and reimbursement information go to: <http://www.rit.edu/controller/travel/mileage.html>
 - b) For reimbursement, faculty/staff traveler must include a map of travel taken (e.g., Google maps, MapQuest), with total mileage of trip.
2. **Rental Vehicles** can only be used when it proves to be the less expensive means of transportation available. When a rental vehicle is required, contact one of the RIT designated travel agencies to make arrangements. If faculty/staff traveler would prefer to contact the rental agency directly, select one of the agencies listed below. To obtain RIT's corporate pricing, refer to the appropriate RIT corporate account number below when making a reservation.

Company	Website	Phone Number	Corporate Number
Avis	www.avis.com	1-800-331-1212	AWD#B005900
Alamo	www.alamo.com	1-800-732-3232	126549
Budget	www.budget.com	1-800-527-0700	BCD#T224700
Enterprise	www.enterprise.com	1-585-235-1655	XZ29401**
Hertz	www.hertz.com	1-800-654-3131	CDP#1807216
National	www.nationalcar.com	1-800-328-4567	XZ29401**
Thrifty	www.thrifty.com	1-800-847-4389	001-0170245

Do not purchase a Collision Damage Waiver or Liability Insurance from the car rental agency except when renting a vehicle outside of the U.S. Contact Global Risk Management Services (GRMS) at (585) 475-6131 for evidence of insurance rentals in California or Texas.

- H. **Faculty/staff travelers must check RIT travel policy to find out if there is a Sales Tax Exempt form for the state to which they are traveling.** A list of states that recognize RIT's Tax Exempt status can be found on the Controller's Office web page at <http://www.rit.edu/controller/travel/taxexempt.html>. If sales tax is paid in a state that honors the RIT Tax Exempt status due to failure on the part of the traveler to present the form, then reimbursement will not be possible. If sales tax is paid in a state that honors the RIT Tax Exempt status due to the service provider refusing to accept the RIT Tax Exempt form, traveler should indicate "Sales Tax Paid" on their receipt page and provide a detailed explanation. If using an online booking agent (such as Hotwire or Travelocity), traveler must provide original, itemized receipts from the hotel in addition to the receipt from the online booking agent in order to be reimbursed for any expenses, including tax.
- I. **Travel with Others:** Individual faculty and staff are always required to provide receipts showing only their individual purchases. When traveling with other employees and/or non-RIT employees (spouse, partner, children, etc.), receipts should not reflect shared expenses for accommodations, transportation, meals, etc. If this is unavoidable, individual expenses for each traveler should be clearly marked.
- J. **Reimbursement:** For all reimbursements, follow these steps:
- Submit reimbursement request to your school's Senior Staff Assistant along with **all relevant documentation and original receipts in chronological order** within two weeks of the last travel day*.
 - Shortly after the Senior Staff Assistant submits the reimbursement request on your behalf, you will receive an email from RIT Oracle Workflow. The subject line indicated that an action is required (Action Required: Expense EX_ _ _ _ _).
 - After opening the email from RIT Oracle Workflow, click on the last link (*Please click here to respond*).
 - Approve or reject the expenses.

*All requests for faculty travel reimbursement must also be submitted by the last day of their employment contract in any given academic year. This timeframe is dictated by the need to reconcile end of year budgets in the School and College before the end of the fiscal year (June 30th). If travel occurs beyond May 31st the employee must notify his/her Senior Staff Assistant, who in turn must notify the CIAS Dean's Office.

II. Recruitment Travel

Faculty and staff are often called upon to travel for purposes of recruitment, i.e. National Portfolio Days, Graduate Portfolio Days, High School and Community College visits, etc. Faculty and Staff recruitment travel must comply with RIT's Travel and Hospitality policies.

If travelling for National Portfolio Days or Graduate Portfolio Days, pre-approval is required from the CIAS Marketing Communications Director, **Kelly Sorensen** kdspgd@rit.edu on the traveler's NPD/GPD Travel Pre-Approval form <https://inside.cias.rit.edu/ciasforms/>

It is expected that faculty and staff participating in National Portfolio Day or Graduate Portfolio Day events will not extend their stay **more than two nights total**. Exceptions may be made for West Coast travel or designated recruitment trips. Permission for additional days must be obtained from the **Administrative Chair** and the CIAS Marketing Communications Director, **Kelly Sorensen** kdspgd@rit.edu prior to making any travel reservations.

Upon return, compile all **original itemized receipts in chronological order** (one receipt per page) along with supporting documents:

- Signed Travel Pre-Approval Form found here: <https://inside.cias.rit.edu/ciasforms/>
- Flight invoice showing dollar amount or personal vehicle mileage documentation form
- Flyer from the event (or other official documentation) showing dates, purpose, etc.

Request for reimbursement and all original itemized receipts must be submitted to the **School's Senior Staff Assistant** for processing.

III. School-funded Professional Development Involving Travel

School Professional Development funds support all full-time faculty, and staff with funds for travel, accommodations and fees associated with conferences, workshops, exhibitions, training, or upgrading of skills. The funds **may not be used for supplies or equipment**.

Professional Development funds are derived from the operational budget of the Schools. Disbursement amounts may vary based on annual College budget, needs, and demands. The Dean of the College determines the amount of Professional Development funding in advance of each academic year. Professional Development activity is tied to a faculty and staff member's annual Plan of Work and should be detailed in their Annual Self Appraisal.

Professional Development funds are allocated for a specific fiscal year (July 1st to June 30th) with no carry over. Schools will record use of Professional Development funds per faculty and staff but faculty and staff must independently chart their expenditures so individual allotments are not exceeded.

Responsible Office: CIAS Dean's Office

Effective Date: October

2013 Guideline History: Revised

July 2014

August 2015

September 20

August 5, 2016

August 17, 2017