



Travel Training

FOR WESTERN WASHINGTON UNIVERSITY
TRAVELERS



University business travel policy is based on state and federal regulations. Specific requirements must be met to ensure responsible stewardship of taxpayer money and for travel payments to be considered non-taxable.

Roles Defined

Traveler:

Person traveling on behalf of Western

Delegate:

Can enter data for a traveler

Supervisory Approver:

Approves the trip's purpose, the employee's time away from regular duties, and for policy compliance

Cost Object Approver (Budget):

Approves the expense funding and for policy compliance

Approver Delegate/Proxy Approver:

May approve on behalf of another approver

Previewer:

Reviews before an approver

Alternate Approver:

Approves when an approver travels on their own budget



University travelers are responsible for:

1. Securing prior authorization for travel - Required
2. Being familiar with [University Travel Policy](#) and completing travel training, including the state [Basic Driver Safety Program](#)
3. Exercising the same care in incurring travel expenses that a prudent person would if traveling on personal business
4. Paying any excess costs and additional expenses incurred for personal preference or convenience
5. Returning as promptly as possible to either the official workplace or home when business is completed

Please Keep In Mind:

Travelers or their delegate may perform the data-entry.

However, the employee traveler remains responsible for the content, accuracy and timely submission of all documents.

Select the most economical method of travel. Consider all costs: travel, labor, etc.

- ▶ Compare flying from Bellingham Airport vs SeaTac with additional shuttle or mileage.
- ▶ Is renting a car during a conference necessary? Can ride shares be used instead?
- ▶ Consider taking the train instead of driving to Seattle or Portland.
- ▶ Is carpooling with colleagues an option?



Types of Travel Documents

TA/Request = Pre-Travel
Authorization

All University Travel must be pre-approved.
*Colleges and Departments may have
additional prerequisites.*

Expense = Expense Report /
Travel Reimbursement

Pre-Travel Authorization Request

Required for all overnight and/or out-of-state travel, including trips at no cost to Western

Is a “Best Guess Estimate” of travel expenses

Should be submitted as soon as travel is known

Must be fully approved before arrangements and expenditures. *Note: Reimbursements for trips that are not authorized may be denied.*

TA Requests are in addition to any department or college pre-approval forms.

Employee travel is authorized and reimbursed through Concur.

Travel must be critical and necessary for University Business.

- The trip must be directly work related.
- The travel purpose should be clear to an outside auditor. Include a brief description of how the travel relates to your job on travel documents.



Arranging Travel

- ▶ Recommended: book with the [Concur Travel tab](#) and Booking Tool, supported by Christopherson Business Travel, Western's preferred travel agency.
- ▶ Using the [Concur travel booking tool](#) provides agency customer support and corporate discounts.
- ▶ Airfare may also be booked directly with an airline or third-party booking sites.



Paying for travel expenses

- ▶ **First check with your department.**
- ▶ **Your manager/administrator may have a OneCard for registration, airfare and other expenses.**
- ▶ **The conference vendor may accept a PO for direct pay.**
- ▶ **Pay out of pocket and be reimbursed, but only after the trip.**



Receipts and Reimbursement

Receipts must be attached to the Expense Report for both reimbursable and company paid expenses.

Receipts should clearly show date, item, vendor and proof of payment.

Include the full flight itinerary with airfare receipts.

Enter a detailed travel itinerary to claim per diem meals, no receipts required.

Enter business destination and purpose of trip to claim personal car mileage.

Allowable Travel Expenses

- ▶ Transportation to/from business locations via airfare (coach), train, personal car (mileage), taxi/uber/Lyft/bus/shuttle, rental car and gas
- ▶ Actual lodging costs within per diem rates unless an approved exception applies. See also [Airbnb Guidance](#)
- ▶ Meals; see University meal reimbursement guidelines
- ▶ Miscellaneous travel expenses such as parking, baggage fees, and ferry



Travel Expenses: What's Covered?

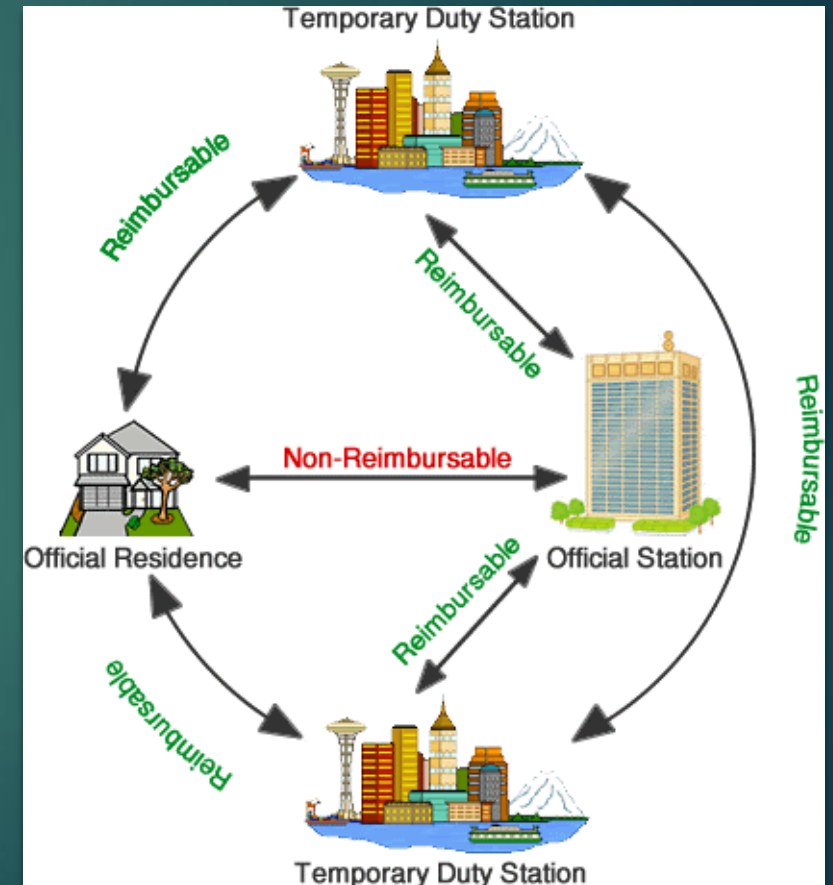
Commute: Travel between home and Official Workstation.

Official Workstation: The city or town where the employee works on a permanent basis for one year or more.

Commute expenses are the employee's personal responsibility.

Example: an employee's Official Workstation is WWU's Bellingham campus. The employee has a business meeting at the Port of Bellingham. Travel between campus and the Port office may be covered, but travel between the Port office and the employee's home would be considered their regular Commute and not reimbursable.

Travel between home and Bellingham airport likewise must deduct commute.



Non-Reimbursable Examples

Note: this is not an exhaustive list

- ▶ **Trip insurance, flight protection, and medical and hospital services.**
Required travel immunizations and Covid testing may be reimbursed with documented claim denial from employee's primary insurance.
- ▶ **Seat upgrades, Business Class**
- ▶ **Purchases with points, miles, and other non-cash payments**
- ▶ **Tips are an incidental expense and are included with the per diem allowance. Exception: tips on ground transportation are allowed.**
- ▶ **Hotel Room Service**
- ▶ **Valet Parking**
- ▶ **Alcoholic beverages**
- ▶ **Transportation costs to or from places of entertainment and other non-state business locations such as dinner at conferences**

Mixing Business and Personal Travel

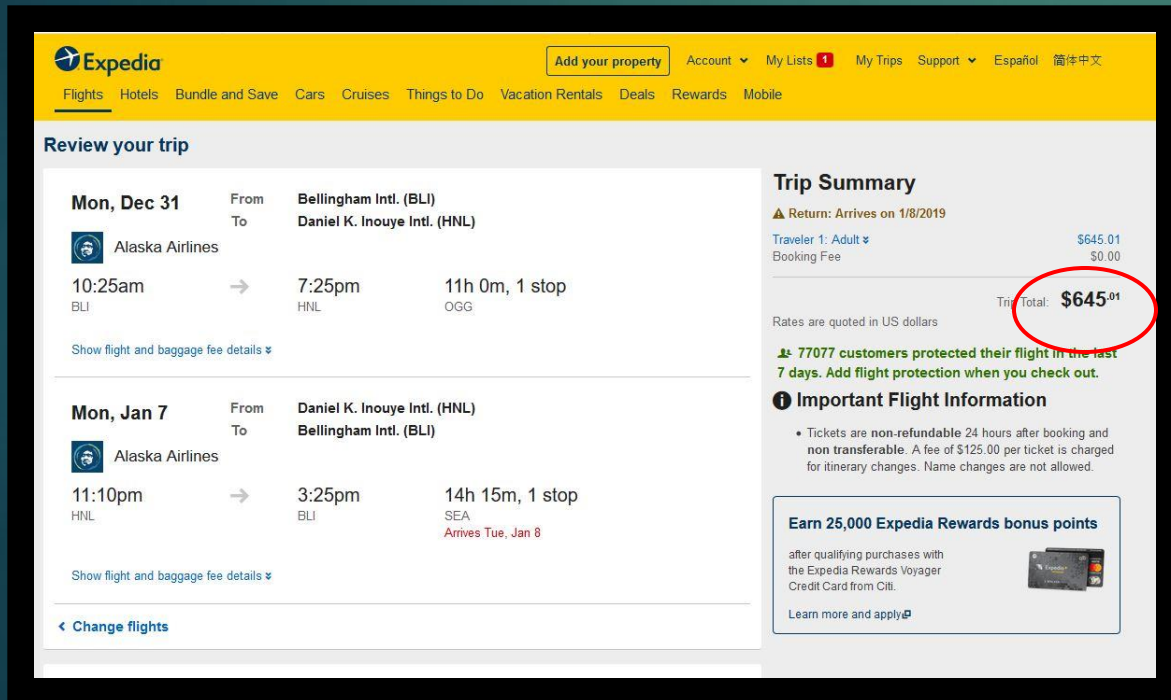
If a traveler would like to add vacation or other personal time onto a legitimate business trip, it is allowed when all the following conditions are met:

- ✓ The primary purpose of the trip is official state business;
 - ✓ The traveler uses, where necessary, his or her approved leave for the vacation or personal part of the trip; and
 - ✓ The state agency does not incur any extra expenses beyond what it would normally incur had the trip occurred without any personal use coupled to the trip.
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- Personal days should be clearly stated in the Request and Expense Report.
 - Enterprise car rentals must be separate reservations. The state contracted rates may only be used for business travel.
 - Parking and other expenses must be prorated.

Mixing Business and Personal Travel

Business Flight Quote

Actual Flight Receipt



This screenshot shows a business flight quote on the Expedia website. The itinerary includes a round-trip flight from Bellingham Intl. (BLI) to Daniel K. Inouye Intl. (HNL) on Alaska Airlines. The outbound flight is on Monday, Dec 31, at 10:25am, and the return flight is on Monday, Jan 7, at 11:10pm. The total price for the trip is \$645.01, which is circled in red. The quote also includes a 'Trip Summary' section with a return date of 1/8/2019 and a 'Important Flight Information' section stating that tickets are non-refundable and non-transferable.

Review your trip

Mon, Dec 31 From **Bellingham Intl. (BLI)** To **Daniel K. Inouye Intl. (HNL)**
Alaska Airlines
10:25am BLI → 7:25pm HNL 11h 0m, 1 stop OGG
Show flight and baggage fee details ▼

Mon, Jan 7 From **Daniel K. Inouye Intl. (HNL)** To **Bellingham Intl. (BLI)**
Alaska Airlines
11:10pm HNL → 3:25pm BLI 14h 15m, 1 stop SEA
Arrives Tue, Jan 8
Show flight and baggage fee details ▼

Trip Summary
Return: Arrives on 1/8/2019
Traveler 1: Adult ▼ \$645.01
Booking Fee \$0.00
Trip Total: **\$645.01**

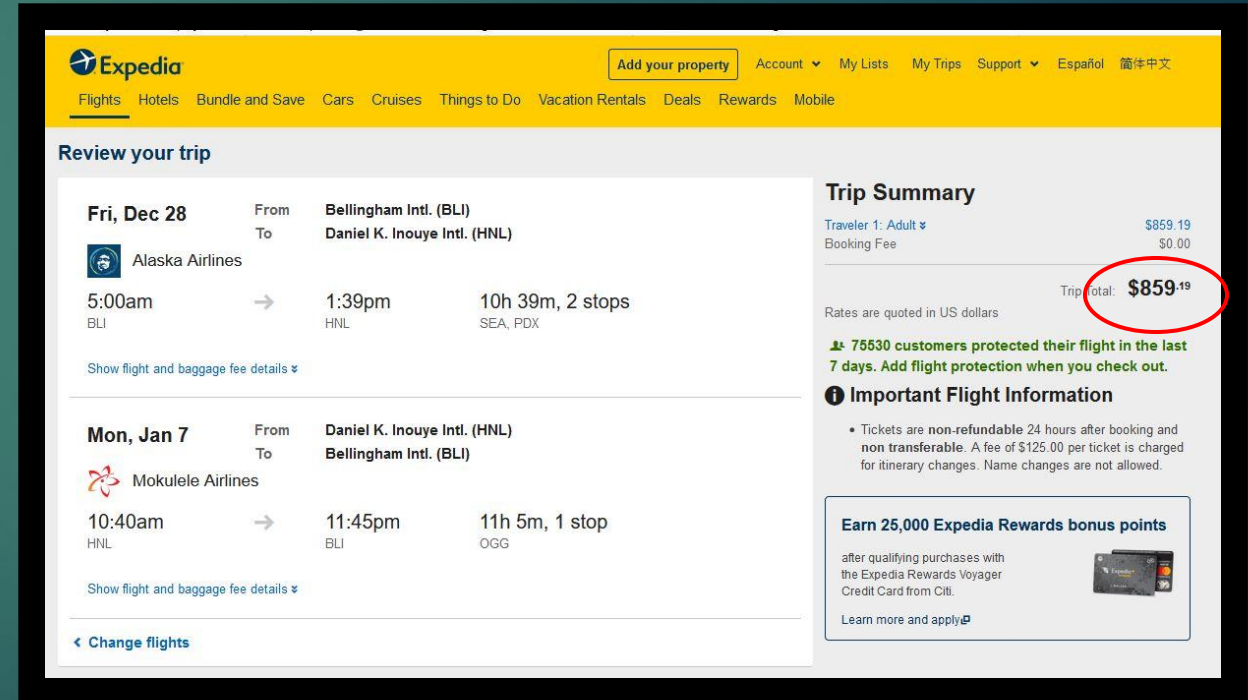
Rates are quoted in US dollars

77077 customers protected their flight in the last 7 days. Add flight protection when you check out.

Important Flight Information

- Tickets are non-refundable 24 hours after booking and non-transferable. A fee of \$125.00 per ticket is charged for itinerary changes. Name changes are not allowed.

Earn 25,000 Expedia Rewards bonus points
after qualifying purchases with the Expedia Rewards Voyager Credit Card from Citi.
Learn more and apply



This screenshot shows the actual flight receipt on the Expedia website. The itinerary includes a round-trip flight from Bellingham Intl. (BLI) to Daniel K. Inouye Intl. (HNL) on Alaska Airlines. The outbound flight is on Friday, Dec 28, at 5:00am, and the return flight is on Monday, Jan 7, at 11:45pm. The total price for the trip is \$859.19, which is circled in red. The receipt also includes a 'Trip Summary' section with a return date of 1/8/2019 and a 'Important Flight Information' section stating that tickets are non-refundable and non-transferable.

Review your trip

Fri, Dec 28 From **Bellingham Intl. (BLI)** To **Daniel K. Inouye Intl. (HNL)**
Alaska Airlines
5:00am BLI → 1:39pm HNL 10h 39m, 2 stops SEA, PDX
Show flight and baggage fee details ▼

Mon, Jan 7 From **Daniel K. Inouye Intl. (HNL)** To **Bellingham Intl. (BLI)**
Mokulele Airlines
11:45pm HNL → 11:45pm BLI 11h 5m, 1 stop OGG
Show flight and baggage fee details ▼

Trip Summary
Traveler 1: Adult ▼ \$859.19
Booking Fee \$0.00
Trip Total: **\$859.19**

Rates are quoted in US dollars

75530 customers protected their flight in the last 7 days. Add flight protection when you check out.

Important Flight Information

- Tickets are non-refundable 24 hours after booking and non-transferable. A fee of \$125.00 per ticket is charged for itinerary changes. Name changes are not allowed.

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Flight quotes must be provided reflecting the business travel itinerary and be obtained on the date of purchase for the actual flight



Per Diem vs. Actual - Meals

- ▶ Rates are based on the trip's overnight location. Return travel day rates are based on the last place you spent the night.
- ▶ Travel day times determine meal reimbursement: 8 am breakfast, 12 noon lunch, 6 pm dinner
- ▶ “Actual” and group meals require itemized receipts and cannot exceed per diem rates

Avoid Paying Unnecessary Taxes!

- ▶ Reimbursements submitted more than 60 days after travel are taxable.
- ▶ The 60-day window begins at the end of your trip.
- ▶ This timeline is based on when the report is first submitted by the traveler in Concur.



Day Trip Meals are Taxable



Please Note: You are eligible to be reimbursed for meals on day trips if **total travel time is a minimum of 11 hours, not including stopping for meals.**

- ▶ **“Day Trip Meals – Taxable” expense type**
- ▶ **Per diem meal rates still apply**



Questions? Please contact Ext. 3341
Travel.Services@wwu.edu