

Travel Expense Reimbursement Policy

Individuals authorized to travel on AAUP-KSU business are entitled to reimbursement for all reasonable travel expenses. Before expense reports can be approved, however, submitted expenses must be reviewed and found to comply with AAUP-KSU policy, which incorporates IRS regulations. Expenses submitted that are not reimbursable will be deducted from the reimbursement. In general, authorized travel should have a significant and demonstrable business purpose directly related to the chapter's mission and goals. Budgetary oversight of travel expenditures rests with the Chapter's elected officers.

Travel Authorization

AAUP-KSU members whose conference or meeting travel is reimbursed by Chapter funds shall be expected to provide an oral report to the AAUP-KSU Council or appropriate Executive Committee about the material covered at the event.

AAUP National Meetings and Regional AAUP Events

Travel authorization for reimbursement of attendance at the AAUP National Annual Meeting and other national or regional meetings such as the AAUP Summer Institute must be approved in advance by the AAUP-KSU Chapter President, AAUP-KSU NTT President, or the AAUP-KSU Chapter Coordinator. The scheduled date(s) and location(s) of these meetings are listed on the National AAUP website (<http://www.aaup.org>). While all AAUP-KSU members are eligible to attend these meetings, it may be necessary to limit members whose expenses will be reimbursed by the chapter. If necessary, the Executive Committees of the two CBU's (or the JCB) shall determine the priorities for funding travel for individual members to attend a specific conference or event. Normally, an individual AAUP-KSU member shall only receive funding from the Chapter for the Summer Institute once every three years.

AAUP Local Chapter and Ohio Conference Meetings and Events

Travel authorization of reimbursable expenses for AAUP-KSU members to represent the Chapter at other local chapter or Ohio conference events shall be approved in advance by the AAUP-KSU Chapter President, AAUP-KSU NTT President, or the AAUP-KSU Chapter Coordinator. If another chapter or conference offers to pay some or all of the travel expense, the traveler is encouraged to accept.

Non-AAUP Meetings and Other Events

Travel authorization of reimbursable expenses for AAUP-KSU members to attend non-AAUP conferences, meetings, and/or workshops is generally limited to events related to collective bargaining or University governance. (Examples: State Employment Relations Board (SERB) and legal workshops, events sponsored by the National Center for the Study of Collective Bargaining in Higher Education, etc.) Requests for such reimbursable travel shall be reviewed

and approved in advance by the AAUP-KSU Chapter President, AAUP-KSU NTT President, or the AAUP-KSU Chapter Coordinator.

Transportation

Transportation authorized for Chapter business includes automobile, railroads, airlines, buses, taxicabs, and other usual means of conveyance. All travel should be by the most economical mode of transportation available, considering time, costs, health and safety considerations, and work requirements.

Air Travel

AAUP-KSU will authorize the purchase of **coach or economy class airfares only**. No business or first-class fares will be paid by the Chapter. Upgrades to business or first-class and fees for changes made after the ticket is purchased are the responsibility of the traveler and will not be reimbursed unless there are extenuating circumstances. Travelers should try to secure discount fares whenever possible and should purchase tickets sufficiently in advance to secure the lowest fares. The Chapter recommends searching the Internet for the lowest fares and then contacting the airline directly to compare prices. Travelers should try to secure super-saver or discount fares whenever possible and should purchase tickets at least 21 days in advance (no later than 14 days in advance) to secure the lowest fares. To receive reimbursement for airfare, the traveler shall submit a copy of the receipt or confirmation of the flight that includes the price of the ticket. Those who do not wish to use their personal credit cards to purchase the airfare should contact the Chapter Office to complete the arrangements for the purchase. No personal travel is to be billed to AAUP-KSU.

Auto Travel

Mileage shall ordinarily be computed between the AAUP-KSU office (or the traveler's personal residence) and the common carrier or destination. For shorter distances, auto travel may be advantageous or the only option available. Unless authorized in advance, the total auto expenses should not ordinarily exceed the cost of available economy airfare or other public transportation that would normally be used. The Chapter will reimburse the traveler for use of his/her personal vehicle at the per mile rate established by the IRS (www.irs.gov). This rate changes periodically and covers all costs of operating the vehicle, including gas. Mileage claimed should correspond generally with the total indicated as the most direct route between points.

When a rental car is used, the traveler normally should rent the lowest cost vehicle available consistent with health and safety considerations. To receive reimbursement, the traveler shall submit the itemized receipt for the rental car (indicating in/out dates, mileage, and breakout of costs) and receipts for gas purchased during the rental period.

Rail Travel

The use of intercity rail travel is encouraged when it is more economical than other forms of transportation.

Ground Transportation

Each traveler is expected to use the most cost-efficient ground transportation (to and from airports and within the city being visited), considering cost, time, availability, health and safety concerns, and scheduling.

Hotel Accommodations

Normally, hotel accommodations at the hotel(s) designated for the meeting or conference will be made by the AAUP-KSU Office unless a significant savings is available at an alternative facility. Travelers are generally required to provide credit card imprints at check-in to guarantee any personal charges, including meals, which are payable at checkout. Meal expenses may be submitted for reimbursement (see “Meal Allowance” regulations below). In-room movies and the mini-bar are considered personal expenses and are not reimbursable. Laundry and personal phone calls are also not ordinarily reimbursable. Double rooms shared by a traveler with individuals who are not on AAUP-authorized travel will be reimbursed at the single occupancy rate. Travelers who wish to stay with friends or family members at a location other than the official meeting site will not be reimbursed for the cost of lodging. If, during AAUP-KSU authorized travel, the traveler wishes to extend his/her stay for personal reasons, these expenses will be the responsibility of the traveler.

Meal Allowances

Authorized travelers may choose to be reimbursed for the actual cost of meals or the IRS designated per diem amount (www.irs.gov). Travelers must pick one reimbursement method or the other. If travelers choose to be reimbursed per diem, they may not receive the per diem reimbursement for those meals that are already included as part of the conference registration. To receive reimbursement for actual expenses, the traveler should submit cash or credit card receipts which include the itemized food items purchased. Meal receipts covering more than one person should indicate the names of those persons, the amounts charged to each person, and the business relationship of those persons, as required by the IRS. Charges for persons not on authorized Chapter business (i.e., spouses, friends) should be subtracted from the total on the receipt.

Other Expenses

Incidental expenses and the documentation required for reimbursement include:

1. tips for baggage carriers, hotel bellmen, housekeepers (no receipt required; maximum \$5.00 per occasion)
2. tolls (actual receipts)
3. parking (actual receipts)
4. gas for rental cars (actual receipts)
5. meeting registration fees (actual receipts, indicating whether meals are included)
6. business phone/internet/fax expenses (actual receipts)

Filing Travel Expense Reports

Travelers are required to keep all receipts. Individuals authorized to travel on official business for the Chapter should submit an **AAUP-KSU Expense Report** (please see Chapter website for a copy of the Form) no later than 30 days after completion of travel. The expense report should be accompanied by original receipts for all authorized expenses. Expenditures must comply with the standards for documentation established by the IRS. Per IRS regulations, no reimbursement will be honored after 90 days. Travel expense reports must be signed by the traveler and submitted to the AAUP-KSU Office Coordinator/Manager. A reimbursement check will be issued to the traveler or mailed to the address indicated on the report within 30 days of receipt of the completed form.

Miscellaneous Expenses

Occasionally, an AAUP-KSU member may purchase a supply item and/or equipment item on behalf of the Association. All such expenditures must be approved in advance by the AAUP-KSU Chapter President, AAUP-KSU NTT President, or the AAUP-KSU Chapter Coordinator. Individuals authorized to make such purchases should submit an **AAUP Miscellaneous Expense Report** (please see Chapter website for a copy of the Form) with a copy of the original receipt(s) no later than 30 days after the purchase. The item(s) purchased should be given to the AAUP-KSU Office (unless authorized otherwise by AAUP-KSU Chapter President, AAUP-KSU NTT President, or the AAUP-KSU Chapter Coordinator).