

# Canisius College Travel Policy and Procedures

revised 10/31/2013

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### **I. Travel Covered by the Policy**

A. This policy applies to all Canisius-sponsored travel, regardless of source of funds including:

- College business travel
- Travel to conferences, conventions, and meetings
- Professional development travel
- Athletic travel
- Campus Ministry service and immersion trips
- Student academic travel

It does not cover local travel, such as field trips, service trips or athletics, except to the extent that car rental or meal reimbursements are involved.

B. This policy governs all major aspects of travel. It does not include specific rules of conduct or other protocols that may be established by faculty members, Campus Ministry, Athletics, or Campus Programming and Leadership Development to insure the supervision, safety, and well-being of students while traveling.

### **II. Underlying Principles**

A. Canisius College strives to support all forms of travel that advance the mission of the college, including student learning and activities, scholarship, pedagogy, service and immersion experiences, intercollegiate competition, college business, and professional development.

B. The policy and procedures are designed to:

- Inform the campus about how travel is budgeted, approved, monitored, and reimbursed.
- Implement fair and consistent practices that enable students, faculty and administrators to make travel arrangements that meet their needs, are cost-effective, and protect their health and safety.
- Guide decisions that ensure equity and consistency across the college for how travel is arranged and conducted.
- Reflect Canisius' concern for the well-being of its faculty, staff, and students, and protect the college and its travelers from actual and potential risks.

### **III. Travel Risk Management and Duty of Care**

- A. Like other colleges, Canisius needs to plan and conduct travel with regard for the health, safety, and security of their faculty, staff, and students, obligations generally described as the college's duty of care. This is especially an issue for international travel.
- B. Anyone responsible for a group of travelers needs to submit documentation indicating that duty of care has been addressed through the approval process. Many departments such as Campus Ministry, Athletics, and Campus Programming and Leadership Development have specific procedures that supplement the duty of care requirements in this policy. Others should document the following and submit to the traveler's supervisor:
- Names and emergency contact information for all individuals on the trip
  - A complete, easily accessible itinerary at the college
  - Identification of those at the college who need to be aware of the trip
  - A plan for potential problems and emergencies, incorporating escalation procedures that include alerting Public Safety
- Click [this link](#) for examples of more detailed questions regarding travel risk assessment and management.
- C. Students on Canisius-sponsored travel are responsible for adhering to all conduct regulations in the Student Handbook as though they were on the Canisius College campus. Faculty and staff will treat Canisius-sponsored travel as an extension of their work and thus subject to professional standards as referenced in the Faculty Handbook. Good judgment should prevail in determining appropriate behavior and activities while traveling.
- D. The Travel Team, the college's official travel agent, may alert travelers to potential risks, such as US State Department warnings. Travelers may also learn about risks through other sources. Ordinarily, Canisius travelers will adjust their travel plans when there are risks for health or safety. If travelers proceed with travel despite knowledge of additional risks, seek approval from the appropriate vice president. The traveler and the authorizing vice president should seek expertise on the type of risk that would be incurred. The vice president must inform the president of any travel approved involving unusual risk to safety or health prior to the trip.

### **IV. Travel Authorization**

#### **A. Overview**

Any travel undertaken by administrators, faculty and/or students must be approved in advance using a Travel Authorization Request Form. (see [Travel Authorization Procedures](#) for information on how to fill out the form.) Travel for programs funded by grants or endowments will often need to be approved under specific terms and conditions; in these cases both college approval and program approval are necessary. Travelers not following the travel authorization policy run the risk of their expenses not being paid or reimbursed.

#### **B. Frequent Travelers**

Multiple trips that can be planned in advance can be approved at one time for the entire term or season (spring, fall, or summer).

#### **C. Student Travelers**

Under ordinary circumstances, all student travel on Canisius-sponsored trips is covered by this policy. In the event that a student using personal funds for a Canisius-sponsored trip has a particular reason to make arrangements outside The Travel Team, and if these arrangements do not create logistical or safety concerns, this can be authorized by the trip leader with the concurrence of the Vice President for Student Affairs and documented on the Travel Authorization form.

## V. Travel Arrangements

### A. Overview

Arrange all airline, train, car rental, and lodging with the college's official travel agent, The Travel Team, Inc., except as noted in V.D.2.f below

[Click this link](#) for information about enrolling with The Travel Team, which is necessary to access their online service, Concur, as well as to make arrangements through an agent. If travelers have special needs, for instance, for health reasons, that need to be addressed in transportation and lodging that are not clearly handled on the Concur website, make travel reservations through an agent.

### A. Tax Exempt Status

- B. Canisius College, as a not-for-profit educational institution, is exempt from sales and use tax in many states. Sales and use taxes are governed at the state (and local) level. The college has exemption certificates for relevant states. When traveling or making a purchase from suppliers in these states, please provide that state's exemption certificate (available from the Controller's Office and The Travel Team's Concur website) to avoid paying sales tax.

### C. How to book travel

1. **Domestic travel** must be booked through the [Concur](#) website unless it is sufficiently complicated to require an agent. Travelers must establish a profile with The Travel Team to use the website.  
If concerns or issues arise with the website, contact Concur online support. Please call 716-332-5055 or their toll free number, 855-418-8392, (choose option 2) Monday - Friday between 8 AM and 6 PM. [Click here](#) for The Travel Team contact information.
2. For **group travel**, use The Travel Team as this policy describes for other kinds of travel. For simpler trips, use the Concur website. Use the Travel team Group agent for larger or more complex trips. If travelers are unsure which to use, call Concur online support.
3. All arrangements for **international travel** and complicated domestic travel should be made with a Travel Team agent during normal business hours.

### D. Guidelines for specific aspects of travel

#### 1. Air travel:

When possible, tickets should be purchased at least 14 days in advance and preferably more than 21 days in advance. All eligible travelers are expected to travel coach or economy class, with standard check-in and boarding, using nonrefundable fares. Consider luggage fees when comparing fares. Upgrades are possible using personal funds or frequent flyer miles.

- Choose air carriers based on lowest cost, not the traveler's frequent flyer subscriptions.
- Every effort should be made to apply unused tickets to a later trip before they expire.
- Travelers are not to use private aircraft when traveling for business.

At the traveler's expense, upgrades to business class are possible by calling a Travel Team agent. The cost of the upgrade and the \$25 fee for using the agent will be charged to a personal credit card.

## 2. Lodging:

- a. When making lodging reservations through The Travel Team, travelers will be prompted to take accommodations that are priced under the U.S. General Services Administration's published [list of per diem rates](#). (These per diem rates are guidelines provided to help Canisius control costs). Select accommodations which are safe and convenient. In the event that hotels within the per-diem limit are in inconvenient locations, travelers can book a more expensive hotel. These hotels will appear on the Concur website coded in yellow or red.
- b. Book non-refundable hotel rooms when confident about the trip.
- c. Make conference hotel arrangements through The Travel team unless the hotel cannot be booked at the conference rate or less. In this case, book directly through the conference.
- d. If a lower hotel rate has been identified or negotiated, contact The Travel Team so they can book using the lower rate and make it available to other Canisius travelers.
- e. The original hotel/motel bill and proof of payment are required documentation for reimbursement. The college will not pay for personal items, entertainment (including movies), gifts, cleaning charges, or minibar items.
- f. Immersion travel and other trips with students can require unconventional lodging, such as Jesuit residences, hostels, retreat houses, stays with families, or other lodging where the trip coordinator has an established connection that is necessary for the success of the trip. Such travel may also require special local transportation, such as van rental in developing countries. Where these arrangements cannot be easily be handled through The Travel Team, document plans to use other methods to book lodging or local transportation on the travel authorization form for review and approval by supervisors including the Vice President or designee.

## 3. Automobile travel:

- a. Use rental vehicles for destinations over 150 miles away (further than Syracuse, Erie, or Toronto).
- b. If a personal vehicle is an option, keep in mind that personal car insurance is the primary insurance coverage if when driving a personal car on Canisius business.
- c. Automobile – Personal Vehicle:  
The college will reimburse drivers based on the IRS Code's allowable reimbursement rate for business miles. When documented by receipts, ferry, bridge, tunnel, toll, and parking charges are reimbursable in addition to the mileage allowance. Upon completion of travel, submit mileage and expenses with documentation on a Travel Expense Report.
- d. Renting an Automobile or a Van:

- 1) Select a cost-effective rental vehicle appropriate for the trip. The college has negotiated lower rates in a non-exclusive deal with Enterprise that will appear on the Concur website; however, travelers are not required to use Enterprise.
  - 2) At the rental office, be prepared to submit tax-exemption documents. Do not purchase additional liability or loss insurance from the rental car company as coverage is already provided through the college's automobile insurance policy. This coverage does not extend to loss of personal items.
  - 3) SUVs or vans may be rented for groups of no more than nine. For liability reasons, van rental must be limited to a vehicle with seating capacity of no more than twelve passengers and must carry no more than nine persons in the vehicle. If more than nine people travel in a single vehicle, insurance limitations dictate that a chartered van or bus driven by a professional be used.
  - 4) Refill the gas tank before returning the vehicle to prevent undesirable refueling charges and avoid drop-off fees by returning the vehicle to the original rental location. For one-way travel, compare the cost of air travel versus driving and the drop-off charge. Provide receipts for reimbursable rental car costs, which include the daily rental fee, gasoline charges, parking, and tolls.
- e. Automobile accidents:  
If travelers are involved in an automobile accident while on college business and driving a personal automobile, the personal automobile insurance policy covers damage to the vehicle and property and the insurance carrier should be notified. Whether in a personal car or rental vehicle, travelers must notify the Business and Finance Office at ext. 2480 within 24 hours (leave a message after business hours), in addition to notifying the appropriate supervisor of the accident.
4. Train:  
Domestic train travel via Amtrak can be booked on the Concur website or through an agent. If traveling by train in a foreign country, contact The Travel Team's international agents.
  5. Chartered Bus:  
Athletic team travel originating from Buffalo will use Niagara Scenic Tours. Contact The Travel Team to charter buses for any other purpose. Ensure an accurate manifest is on file.
  6. Meals:  
The college will pay or reimburse the actual, reasonable cost, including tax and gratuity, of the traveler's meals during the travel period. Per-person meal costs should not exceed the U.S. General Services Administration's published per diem schedule <http://www.gsa.gov/portal/category/21287>. Meals are defined by the GSA as expenses for food and drink, including related tips and taxes. Supervisors must approve any spending over this limit.
  7. Sponsored Travel, such as that funded by a grant, endowed funds, an agency account, or another institution:
    - a. If traveling under a sponsored program, become familiar with detailed requirements regarding travel and adhere to those limits. For example, Federal awards require that U.S. flag air carriers be used regardless of cost, convenience, or personal travel

preference. For specific information regarding sponsor requirements, contact the Office for Sponsored Programs prior to incurring any foreign travel expenses.

- b. The policy applies for all travel in a professional capacity as a representative of the College. If a paying institution requires use of its own travel agency, note that on the authorization form.

8. Mixing College and personal travel

If travelers intend to make arrangements to extend a trip by adding personal travel onto a College-sponsored trip, all incremental costs must be paid by personal credit card or, if not possible, reimbursed to the College, including the difference for a higher-priced plane trip, any additional nights' lodging, additional rental car expenses, etc. Guests pay their own way, as described in the next section.

9. Travel for those other than faculty, staff, and students

- a. For people traveling at the college's expense such as job candidates and speakers, use The Travel Team whenever possible. If it is not practical to do so, the college will reimburse reasonable transportation expenses and reimburse lodging and meals up to the per diem allowance.
- b. Family members and friends who do not travel at the college's expense are encouraged to use The Travel Team, paying with a personal credit card, but are not required to do so unless the trip is sponsored by Canisius.

10. Traveling under multiple Indexes:

Allocating travel to different sources of funds is handled when seeking authorization and when submitting the Travel Expense form.

## **VI. Travel Accounting, Payment, and Reimbursement**

### **A. Tracking Travel Expenses and Seeking Reimbursement**

College travel is reimbursed only on the basis of actual and reasonable expenses incurred, subject to the limitations set forth in this policy. All travel expenses, whether initially paid by the traveler or by the college, must be documented with a Travel Expense Report, obtained through myCanisius. Attach a copy of the itinerary from The Travel Team and a copy of the original approval. The expenses submitted should be consistent with the original approval. Keep original receipts, which are required for all travel expenses, including airfare, hotel, and car rental bills.

All claims for reimbursement of foreign travel expenses must be made in U.S. dollars. Most credit and debit cards make the conversion automatically. For cash expenses, ensure there is appropriate evidence for the calculation, including a copy of the bank statement, which will show the conversion rate as well as the relevant reimbursable foreign ATM fees.

The prospective traveler will give the signed Travel Expense Report to his or her immediate supervisor for review and approval. Vice presidents and the president must have their travel expenses reimbursed by the vice president for business and finance. In each case, the person approving the Travel Expense Report is responsible for ensuring that all expenses incurred were reasonable and within policy, unless an exception had been previously approved. Approved expense reports are sent to the Controller's Office for processing.

B. Other Reimbursable Expenses

Other reimbursable expenses associated with travel include parking, airport shuttles, public transportation, taxi fares & tips when necessary, registration fees, telephone calls made while on official business, and miscellaneous expenses clearly related to the purpose of the travel and fully documented as such.

C. Travel Time Pay for Hourly Employees

For information on compensation for nonexempt (overtime pay eligible) employees, consult with Human Resources.

D. Fees

[Travel Team fees](#) for Canisius faculty, staff, and student travel will be paid centrally by the college and do not need to be budgeted for individual trips

## APPENDIX: TRAVEL PROCEDURES

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#### A. Travel Expense Reimbursement

Use an Expense Reimbursement form available on myCanisius under Canisius Policies and Forms/Forms.

Attach a copy of the Travel Team itinerary to the Expense Reimbursement form.

Budgeting and posting actual expenses will appear in the following lines:

- 801351 Travel & Transportation
- 801355 Lodging & Travel Meals\*
- 801356 Events, Meetings and Receptions
- 801357 Athletic Team Travel
- 801358 Conference Registration Fees

\* Food served at campus events should not be budgeted in or spent from Travel Meals. Use the Events, Meetings, and Receptions account. If Chartwells is catering an on-campus event, use account number 801354.

A partial list of non-reimbursable expenses follows:

- a. Cost of commuting between the traveler's home and the campus
- b. Gasoline when the personal mileage reimbursement rate is claimed
- c. Rental car insurance
- d. Fines for automobile violations
- e. Lost or stolen tickets, cash, or property
- f. Damage to property
- g. Additional travel expenses incurred when an itinerary is altered to accommodate personal affairs (e.g., airline change fee, travel accident insurance)
- h. Child care or babysitting expenses
- i. Additional expenses associated with first class airfare
- j. Costs incurred by spouse or other dependents traveling
- k. Cost of personal medications
- l. Costs incurred by unreasonable failure to cancel transportation or lodging reservations
- m. Entertainment expenses, including movies in the hotel room
- n. Other expenses not directly related to the business purpose of the travel

The college will not provide reimbursement for (a) repairs to the traveler's personal car, even if these costs result from business travel, or (b) travel between a personal residence and a regular work location

### B. Travel Authorization Procedures

Before making a reservation, the traveler will submit a Travel Authorization Request online to be electronically approved by each supervisor in the reporting hierarchy up to the appropriate vice president or the vice president's designee. Approval is necessary before any expenses are charged to a Canisius College credit card or any travel funds are disbursed.

Authorization can be requested for an entire season's travel where the details are known in advance, such as Athletics or Admissions travel. In these cases, the 'estimated expenses' should include the expenses for all trips covered by the authorization.

### C. Establishing a personal account with The Travel Team, Inc.

The first and most important step is to set up an account record (profile) with The Travel Team, Inc. In an effort to protect Canisius College's data integrity and prevent fraud, our agents cannot accept a reservation unless travelers have a profile. (There are certain exceptional situations where a guest registration may be appropriate; these areas have a somewhat different procedure.) To enroll, register at [https://www.concursolutions.com/registration/register\\_form.asp?regcode=CANISIUS](https://www.concursolutions.com/registration/register_form.asp?regcode=CANISIUS). Canisius Human Resources will need to approve the profile. Travelers may expedite this process by notifying HR at 888-2240 in advance. Within one business day travelers will receive approval and instructions for completing the profile. For questions, contact 716-332-5055 for the local Travel Team office or 855-418-8392 and choose the option for reaching the appropriate department. Travelers can also email [online@thetravelteam.com](mailto:online@thetravelteam.com). **It is extremely important to update a personal profile with TSA Secure Flight data.** Canisius College's Company Code is 1UI2-Canisius (#1, uncle, igloo, #2 – CANISIUS). Please include the name, birth date and gender *exactly* as it appears on the government issued ID used when traveling. Airlines have started to deny boarding to travelers who do not have this information in their reservations at the time of check-in. Additionally, all of membership accounts should have the traveler's name as it appears on the government issued ID on record. Travelers will not accrue miles or points if the vendors do not have this information. Please contact each vendor to make any changes.

You can load your personal credit card into concur in addition to a Canisius Purchase Card.

To book a guest, contact Human Resources to add "guest" capabilities to your Concur account. The guest's airfare can be charged to a personal card while the Canisius traveler's airfare is charged to a Canisius Purchase Card.

### D. Travel Team Fees

Concur website

- \$ 8 To make a reservation on the Concur website
- \$ 8 Concur cancellations for Air travel (hotel and car cancellations have no charge)
- \$ 0 Concur technical support
- \$15 Agent-assisted on-line transaction

Agents by phone

- \$25 To make a domestic reservation by phone including air or rail. Also applies to upgrades and to application of airline credits.
- \$10 To make a domestic reservation by phone if car/hotel only
- \$50 To make an international reservation by phone
- \$ 0 Cancellations, voids, and refunds.
- \$25 Domestic exchanges

- \$50 International exchanges
- \$25 After-hours call – domestic
- \$50 After-hours call – international

Although the college is paying fees centrally, a list of fees paid in the prior month will be distributed so that travelers can ensure that the college was not charged inappropriately. Any fees that need further research should be referred to Deborah Winslow-Schaber.

#### E. Contacting The Travel Team

Call 716-332-5055 or 855-418-8392

At these numbers, there will be options for

- Domestic agents (including Canada, Mexico, Caribbean)

- International agents

- Group/Meeting – at present, Andrea Bunker is our Group representative.

- Concur online support/online navigational support

If travelers would like to have someone in authority handle any international situation beyond the agent, ask for the International Travel supervisor, Monika McKeele.

Domestic issues can be brought to the Domestic Travel supervisor, Kevin Brinkman.

Any other concerns with The Travel Team can be escalated to the travel agent manager, Julie Gicewicz, or to Deb Winslow-Schaber at Canisius.

#### F. Some risk management questions for group travel

**LOGISTICS** - How is a team registered with the college? What are the necessary steps trip leaders must take to clear the trip to go? How many trip leaders are required? Who is involved at the college in this? Is there cell phone policy abroad? How do travelers stay in contact with the college? Who is the “point person” at the college for trip emergencies?

**TRAVELER EMERGENCY** - What is the protocol that we follow in the case of an emergency? (Faculty/Staff/Student death abroad? Death at home someone needs to return to? Medical issue that cannot be addressed adequately abroad?) How is the college covered legally here? What is the protocol if a student needs to return home? Under what circumstances can the distressed traveler be flown home under the provisions of our Study Abroad insurance or The Travel Team’s capabilities? Students traveling abroad should get international Student ID Cards (ISICs) at <http://www.isic.org/>; consider if faculty should get International Teacher ID Cards (ITICs).

**HEALTH/SAFETY** - What is the protocol for safety? What medical information is required from the travelers? Should everyone get a medical clearance sheet signed by his or her primary physician? Does the team bring a medical kit or should each person bring one – and what should be in such a medical kit? Be aware of the college’s health insurance policy for foreign travel and how it applies to the trip. What advice can be offered around food/drink, bathrooms, transportation, swimming, etc. that can help keep travelers safe? What will happen if a location previously deemed safe becomes unsafe during travel?