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<b>Policy Number/Title:</b>	8.1.04 Travel Approval & Reimbursement Policy
<b>Effective Since:</b>	August 6, 2025
<b>Last Revision Approved:</b>	
<b>Responsible Official:</b>	Vice President for Finance and Business Affairs

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### Scope:

This policy applies to all Winthrop University (“Winthrop”) employees, students (Athletic team travels, conferences, projects), consultants, contractors, employee candidates, volunteers and visitors traveling on Winthrop business regardless of the source of funds used for reimbursement. It covers all types of travel such as domestic, international, conference, field trips, athletics team travels, etc. Please refer to the “Winthrop University Compensatory Time, Overtime, and Official Workweek Policy” for calculating hours worked while traveling.

### Definitions:

For domestic travel, the **travel start and end date** is the day before and after the event.

For international travel, the **travel start date** is up to two days before the event and the **travel end date** is one day after the event.

**International travel** includes locations outside the 48 contiguous United States, District of Columbia, Alaska, Hawaii, Puerto Rico, Guam, the Northern Mariana Islands and any other territories and possessions of the United States.

The U.S. General Services Administration (“GSA”) per diem **M&IE** (“meals and incidental expenses”) per diem rates include the cost of the meal, gratuity, and taxes. The Incidental allocation of M&IE per diem is intended to cover small fees and gratuities for porters, bellhops, maids, and of transportation between lodging and the place of the meal.

### Policy:

This policy provides guidelines for the authorized travel of faculty and staff (“employees”), non-employees, and students on official Winthrop business. This policy ensures that travel is conducted economically and efficiently, while maintaining compliance with federal and state regulations, donor restrictions, and grant guidelines.

A traveler on official business of Winthrop will exercise the same care in incurring expenses and accomplishing an assignment that a prudent person would exercise if travelling on personal business. Excess costs, indirect routes, delays, or unnecessary luxury accommodations in the performance of an assignment are not deemed as exercising prudence.

### Procedures:

## International Travel

- Any and all student international travel, including but not limited to study abroad and faculty-led programs, must be approved by the International Center prior to making any travel arrangements and/or purchases.
- Any and all international travel must be reviewed for travel advisories (Travel.State.Gov) and approved by Winthrop's President.
- Business-related phone calls and internet may be reimbursable if pre-approved on the Travel Authorization form.

## Air Travel

- Travelers must seek the lowest fare available, via the most direct and expeditious route, and endeavor to book fares at least 4+ weeks in advance to gain the best price.
  - Travelers must fly via the lowest cost coach/economy class fare for which a seat is assigned (including the minimum amount for a seat selection fee, if any).
    - Exception: upgrades above coach but under first class for bona fide medical accommodation.
  - Nonrefundable flights should be booked.
    - Exception: If a flight is being booked for a non-employee or non-student (i.e. candidate, recruit, speaker, etc.), then a refundable ticket may be purchased.
  - State funds may not be used to purchase first-class airline tickets.
  - Reimbursable expenses:
    - Baggage fee for one checked bag for travel 7 days or less; either baggage fee for two checked bags for travel 8 days or more or laundry / dry cleaning expenses.
    - Parking fee or rideshare to/from airport.
      - Pro tip: For travel for 4 days or more, it can be more economical to use rideshare to/from the airport versus paying a daily parking fee.
  - Non-reimbursable purchases:
    - Trip insurance
    - In-flight food or beverage
    - In-flight or airport internet
    - In-flight entertainment
    - Porterage service
    - Gratuities
- For travelers using Federal grant funds, U.S. flag air carriers must be used, unless exceptions outlined in the Code of Federal Regulations (sections §301–10.135, §§301–10.136, and 301–10.137) apply.
- When choosing between driving or airfare, the traveler may decide which travel method but will only be reimbursed at the lower of the options.

## Ground Travel

- **Train / bus / rideshare:**
  - Travelers must seek the lowest fare available, via the most direct and expeditious route, and endeavor to book fares at least 4+ weeks in advance to gain the best price.
  - Travelers must travel coach/economy class.
  - Gratuities are not reimbursable.
- **Mileage:**
  - Mileage between an employee's residence and their workplace is not eligible for reimbursement. For travel, mileage is calculated based on the lesser of the distance between the traveler's residence and destination or their duty post and destination.
  - Mileage rates are defined by the State of South Carolina.
  - Mileage is not reimbursable when using a rental car.
  - Mileage is not reimbursable for employees with a State-issued vehicle or car allowance.
  - Parking and toll fees are reimbursable.
  - Parking/toll/traffic/etc. fines are not reimbursable.
- **Rental Cars/Motorcoaches:**
  - Reimbursement will be provided for the cost of the rental car/motorcoach and fuel. Additional charges, such as insurance, are not reimbursable.
  - Rental car companies with a SC State contract must be used for State of South Carolina rates. Decline additional insurance.
  - Decline pre-paid fuel option.
  - Keep gas receipts.
  - Gratuities are not reimbursable.
    - Exception: Except when paid as a part of group travel billing (i.e. motorcoach).
  - Not reimbursable for employees with a State-issued vehicle or car allowance, unless in connection with required air travel.
  - Parking and toll fees are reimbursable.
  - Parking/toll/traffic/etc. fines are not reimbursable.
- **Use of Personal , State-Owned and Rental Vehicles**
  - **Employees who elect to use their personal vehicle for official Winthrop business are responsible for all costs associated with any accident, injury, or damage incurred during such travel, including injuries to themselves or any passengers (including other Winthrop employees).**
  - **Employees must maintain and be able to provide proof of valid automobile insurance coverage.**
  - **Employees operating a personal vehicle, rental vehicle, or a Winthrop- or state-issued vehicle for Winthrop business must possess a valid driver's license.**
  - **For those assigned a Winthrop or state-issued vehicle, the Winthrop will request a driving record from the Department of Motor Vehicles. Based**

**on the contents of the record, an employee may be deemed ineligible to operate a Winthrop- or state-owned vehicle.**

## **Lodging**

- No reimbursement for overnight accommodation made within 50 miles of the traveler's official headquarters and/or residence.
- Lodging arrangements must be appropriate and cost-effective. The maximum reimbursement for lodging will be based on lodging per diem rates for the destination city as set forth by the [GSA](#), plus taxes and allowable fees. Any exception must have written approval from the Finance and Business Office before incurring the expenditure.
  - Exception: Lodging at hotels affiliated with a conference is permissible with documentation reflecting the designated lodging.
- Resort fees are not considered reasonable and not reimbursable business expenses.
  - Exception: Resort fee at hotels affiliated with a conference is permissible with documentation reflecting the designated lodging.
- Lodging must occur at commercial locations. Lodging through VRBO, Air B&B, or similar options is not permitted.
- Non-reimbursable expenses include:
  - Gratuities
  - Phone calls and internet
    - Exception: For international travel, business-related phone calls and internet may be reimbursable if pre-approved on the Travel Authorization form.
  - In-room entertainment
  - Laundry
    - Exception: For travel 8 days or more, either laundry / dry cleaning expenses or the fee for a 2<sup>nd</sup> checked bag may be chosen for reimbursement.

## **Meals and Per Diem**

- Employees and students are required to use the [State of South Carolina per diem rates](#). Receipts are not required if per diem is claimed. Gratuities are included in the per diem rate.
- Non-employee meals will be reimbursed according to the GSA per diem M&IE ("meals and incidental expenses") per diem rates for their dining location.
- For employees and students, international meals will be reimbursed according to the GSA per diem M&IE per diem rates for their dining location.
- If a meal is provided at no cost (e.g., as part of a conference), that portion of the applicable per diem must be excluded.
- Meals will not be reimbursed if the travel is within 10 miles of an employee's duty post and/or residence, whichever is less.
- For employees, one-day trips (not overnight travel), any meal reimbursement is considered taxable income and will be reported on the employee's W-2 form.
- Meals may be reimbursed when employees attend statewide, regional, or district meetings in the area where they are headquartered, provided that at least 75% of the

attendees are employees of other agencies or outside organizations. Meetings of boards, commissions, and committees do not qualify as statewide, regional, or district meetings for this purpose

- Gratuities included as part of the billing for group travel events—such as luncheons, banquets, and similar functions—are allowable.
- Alcoholic beverages are **not** reimbursable under any circumstances.

## **Travel Forms & Process**

### **Travel Authorization**

- All travel on behalf of Winthrop must be approved in advance by the appropriate department head or designated approving official.

#### **Employee Travel**

- A travel authorization form must be completed with the necessary approval signatures obtained. Accounts Payable should be sent the completed form 7 days prior to the start date.
- All travel authorization (TA) requests to attend a conference **MUST** include the conference agenda or agenda-equivalent details.
- All grant-related travel must be approved by the Winthrop Grant Accountant.
- All international travel must be approved by the President.

#### **Employee Candidate Travel**

- Travel for out-of-state candidates must be preapproved by the President using the “Out of State Candidate” form on the AP website.
- Travel for in-state candidates may be reimbursed to the candidate using the Travel Reimbursement form, with signatures being supplied by the travel coordinator and department leadership.

#### **Student / Other Travel**

- Required to sign Winthrop’s Liability Waiver found on Winthrop’s “Risk Management” webpage.
- If a non-employee / student anticipates using personal funds to pay for reimbursable travel expenses, they are bound by the employee requirements for reimbursement above.
  - Exception: if a non-employee has completed other contracts or forms that agree to travel expenses and reimbursement, then a travel authorization form is not considered necessary.

### **Interim Travel Reimbursement**

In an effort to reduce travel advances and unnecessary use of the P-Card, Winthrop will reimburse employees for commercial travel fares and conference registration fees prior to travel for business-related travel charges that they've incurred personally. Lodging holds will not be reimbursed prior to travel.

- Requests for interim travel reimbursement may only be submitted before travel occurs.
- Cannot be used if a travel advance has been requested for the specific expense.
- Interim Travel Reimbursement must exceed \$250 to be processed.

### **Travel Advance**

The primary purpose of providing travel advances to employees (only) on official state business is to ease the financial burden on any traveler who requires additional travel funds over and above what cannot be addressed via the Interim Travel Reimbursement process or be reasonably reimbursed within 30 calendar days from the return date of travel. Travel Advances are mainly to cover travel expenses associated with student-employee or group travel.

- All travel, regardless of payment / reimbursement method, is required to be pre-approved through the Travel Authorization form.
- Requests for travel advances must be submitted to the Accounts Payable Office at least 10 business days before the start of the trip. Requests for travel advances may be submitted earlier than 10 days before the start of the trip but will not be paid out any sooner than 10 days before the start of the trip.
- Employees must submit a travel reimbursement report within **30 calendar days** of returning from travel to reconcile the advance.
- The Travel Advance form itself requires travelers to grant Winthrop authority to seek reimbursement for travel advances if appropriate documentation has not been received timely.
- Other travel expenses such as airline, rental car, conference fees, etc. may be eligible to be purchased with a Winthrop P-Card (see P-Card policy) or reimbursed using an Interim Reimbursement form or Travel Reimbursement form.
- Travel advances must be over \$250 to be processed.

### **Travel Reimbursement**

- Travel Reimbursement form should be completed and submitted to AP no later than 30 calendar days after the last day of travel. If the last date of travel is the last week in June, the Travel Reimbursement Form must be approved and submitted to AP by the processing deadline for the fiscal year.
- The reimbursement to the traveler cannot exceed the amount approved on the travel authorization by more than 5% without approval from all previous approvers.
- Any excess travel advance funds should be returned through the Cashier's office as a departmental deposit.
- Detailed documentation / itemized receipts showing the last 4 digits (or "Cash" if paid in cash) of the card used must be submitted for all expenses.
  - Every effort must be made to maintain or recover missing receipts. A missing receipts affidavit must be submitted for lost receipts.

### **Blanket Travel Authorization Form**

- Blanket Travel Authorization Forms can be used for routine travel where traveler, traveling method, purpose, and funding source remain the same.
  - This form is required to be updated, reviewed, and approved annually.

- A budget ceiling must be indicated on the form.

### **Refunds / Cancellations**

- Fees or foregone payments due to cancellations are responsibilities of the department, not the traveler.
- If travel refunds benefit the traveler (i.e. revert to their personal account as a refund or credit), the traveler should reimburse Winthrop if Winthrop funds were used.

### **Insurance Coverage While Traveling**

- Winthrop employees are covered under the South Carolina State Accident Fund for work-related injuries sustained while traveling on official Winthrop business.
- Guests or other non-Winthrop individuals who accompany a Winthrop employee during official Winthrop travel are not covered under Winthrop's insurance policies. These individuals travel at their own risk.

### **Compliance and Exceptions**

#### **Non-Compliance**

- Expenses outside of policy guidelines (such as luxury travel upgrades without approval) will not be reimbursed.
- The Finance and Business Affairs office will regularly monitor the use of P-Cards for travel-related expenses. Any misuse or non-compliance with the procedures outlined in this policy may result in the suspension of P-Card privileges and the requirement to reimburse unapproved charges.
- Willful violation by employees may result in disciplinary action, which can be referenced in Winthrop's "Progressive Discipline Policy."
- Willful violation by students may result in disciplinary action, which can be referenced in Winthrop's "Student Code of Conduct."
- Willful violation by non-students and non-employees may result in unfavorable action including reduction or cancellation of contract or agreement, refusal to reimburse expenses, demand of return of funds, etc.

#### **Exceptions to Policy**

- Any exception to this Travel Policy must be approved in writing in advance of the first date of travel by the CFO/Vice President for Finance and Business Affairs.

### **Guides:**

None

### **Forms:**

None

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