



Travel & Reimbursement Policy

ADM 23.0

Office of Business Affairs

Policy Type: Operational
Applies to: Anyone traveling on behalf of the University

POLICY DATES

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Reviewed:

This Travel and Reimbursement Policies and Procedures Guide attempts to address many of the circumstances faculty, staff and students may incur when traveling on University business. It applies to all individuals traveling on University business, regardless of the source of funds, as well as those who supervise such travelers, make travel arrangements for themselves or others, and for those who review, approve, process or record financial transactions on behalf of Mount Union. Departments may implement more restrictive policies and procedures to which personnel should adhere to, and likewise, federally funded grants/awards may have additional requirements the traveler may need to understand and follow. Please note that this policy cannot cover every possible situation that may occur while traveling on University business. If there are questions regarding these policies and procedures, or if certain circumstances are omitted from this guide, please consult the Business Office for clarification.

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Policy Details

Please reference full policy document for additional details.

PROCEDURE

Please reference full policy document for additional details.

Responsibilities

Position or Office	Responsibilities
Academic Affairs	Faculty Travel
Controller's Office	General Travel Guidelines
Student Affairs	Student Related Travel
Student Involvement and Leadership	Student Organization Travel
Global Center	International Travel
Athletics	Athletic Travel

Resources

(Need link to full policy document)

Contacts

Subject	Office	Telephone	E-mail/URL
Faculty Travel	Academic Dean	330-823-2690	academic@mountunion.edu
General Travel	Business Office	330-823-6566	businessoffice@mountunion.edu
Student Travel	Student Affairs	330-823-7288	student_affairs@mountunion.edu
Student Organization Travel	Student Involvement and Leadership	330-823-2885	carnelke@mountunion.edu
International Travel	Global Center	330-823-3864	gloaled@mountunion.edu
Athletic Travel	Athletics	330-823-6093	reichl@mountunion.edu

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TRAVEL and REIMBURSEMENT POLICY

Travel/Reimbursement for University-related business
Student organization travel
Students traveling with faculty/staff
Athletic team travel

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Overview

The University of Mount Union recognizes that University business may require faculty, staff and students to travel. Individuals traveling on behalf of the institution should conduct their activities in good faith with the best interest of the University in mind. Travel and related expenditures should be authorized and spent in a manner that is responsible in the use of University funds, the clear majority of which are derived from student tuition payments. It is our responsibility to be attentive and accountable for the effective use of these resources and as a result, Mount Union will pay for normal, reasonable and prudent business-related expenses that are incurred by individuals traveling on University business. This policy provides general guidelines for the appropriate and reasonable expectations you, as a faculty or staff member, as well as a student, must follow in accordance with Mount Union policy. Expenses that do not comply with policy are the responsibility of the traveler.

This Travel and Reimbursement Policies and Procedures Guide attempts to address many of the circumstances faculty, staff and students may incur when traveling on University business. It applies to all individuals traveling on University business, regardless of the source of funds, as well as those who supervise such travelers, make travel arrangements for themselves or others, and for those who review, approve, process or record financial transactions on behalf of Mount Union. Departments may implement more restrictive policies and procedures to which personnel should adhere to, and likewise, federally funded grants/awards may have additional requirements the traveler may need to understand and follow. Please note that this policy cannot cover every possible situation that may occur while traveling on University business. If there are questions regarding these policies and procedures, or if certain circumstances are omitted from this guide, please consult the Business Office for clarification.

To ensure sound business practices and proper reporting, travel expenses must be in compliance with external regulations, including but not limited to tax regulations under the Internal Revenue Service (IRS). This policy has been developed to comply with such regulations and travelers are responsible to understand this policy before traveling on behalf of the institution. Periodically, the Office of Business Affairs will conduct policy training, and will be glad to meet with faculty and staff upon request.

The traveler must complete and submit travel and expense (T&E) forms in a timely and appropriate manner prior to making any obligations using Mount Union funds, accompanied by documentation demonstrating that expenditures incurred are reasonable and related to the business of the University. Each department or program at the University has a person responsible for approving University-related travel and expenses.

This guide is in place to govern travel preparation, guidelines while away from Mount Union, payment methods, documentation and reimbursement procedures, as well as liability and insurance guidelines. It is segmented into the following sections:

- Guidelines that apply to all University-related travel ***regardless of purpose***
- Special guidelines and checklists that apply to these specialized forms for travel
 - Student organization travel
 - Students traveling with faculty/staff
 - Athletic team travel

For faculty and staff who plan to travel internationally, whether on study abroad trips, conducting faculty-led international trips, or traveling for University business, please consult the Center for Global Education's [Faculty and Staff-Led International Travel Seminars Handbook](#) for procedures and special requirements. Payment methods, documentation and reimbursement procedures can be found in this document for proper payment of University-related expenses.

Traveling on University-related business

The University of Mount Union meets the IRS definition of an “accountable plan.” As a result, travel advances and reimbursements do not have to be reported as income to the traveler if such expenses meet these three **requirements**:

- Advances must be made for business expenses only and must be reasonably related to the expenses the employee is expected to incur. Faculty and staff must return any advance amounts in excess of substantiated expenses within **fifteen (15)** days after completion of the trip.
- Travelers must provide, on an authorized [Travel and Miscellaneous Expense Reimbursement Form](#) or electronically if using the University Purchasing Card (“P-Card”), a statement substantiating the amount, time, use and business purpose of expenses within a reasonable time (not to exceed sixty (60) days) after the expenses are incurred. **Original receipts must be attached to the statement for all expenditures over \$25.**
- If a faculty or staff member does not substantiate expenses and/or return any excess advance within a reasonable period of time (<120 days), this amount must be treated as if it were paid under a non-accountable plan and must be treated as compensation, subject to withholding on the individual’s W-2 form and may lead to a loss of travel privileges and use of the University P-card..

General Definitions:

- **Student Organization Travel**- any off-campus experience that is sponsored by a recognized and registered University student organization.
- **Same Day Travel**- less than 50 miles from campus, and/or a duration of less than 8 hours.
- **Overnight Travel** – any off-campus travel that keeps the traveler away for one night or more. It is recommended that overnight travel have a 12:1 student to faculty/staff member ratio or less. In instances where it is difficult to meet the 12:1 ratio with faculty, staff, or volunteers, a student leader should also be identified as a point person to assist in resolving any problems or issues that occur during the trip, or to serve in a leadership capacity. Recommended student leaders include organization president or vice president, team captain, etc.
- **Students Traveling with Faculty/Staff**- any off-campus experience that is sponsored by a group not recognized as a student organization and is led by faculty or staff for academic or extra-curricular purposes.
- **Duty and risk**- Duty to students who are invitees on a trip include responsibility to discover and correct any known and dangerous conditions or to warn of their existence. This liability usually takes into account that situations present potential dangers to participants. Sponsorship of an activity (field trips, workshops, etc.) creates a special relationship and increases the obligation of the University and its faculty and staff to supervise and prepare students for any foreseeable hazards they might encounter during the trip.
- **Duty to warn/educate**- A duty to educate participants of known hazards and prepare them for foreseeable hazards they might encounter is expected. When faculty or staff are aware of conditions

that may pose an unreasonable risk to a participant, especially those that may be unclear to a casual observer, there is greater potential for liability.

- **Negligence**-Failure of one who is owed a duty of care to another to fulfill that duty, resulting in injury to the party owed the duty of care. Negligence can occur both by doing something that a reasonable or prudent person would do in a certain situation, or from failure to do what a reasonable or prudent person would do in a certain situation
- **Duty to use reasonable care**- A duty to provide safe conditions for a participant in a student organization trip is expected when travel supervisors know or should have known of a potentially dangerous situation. All advisors/leaders must exercise good judgment in carrying out their responsibility to use such reasonable care in planning and implementing a trip.
- **Assumption of risk**
In many situations, students assume the obvious and inherent risks associated with travel and activity for an organizational trip. A student is expected to act reasonably, follow the rules provided and not be negligent.

Responsibility of Travelers/Purchasers

Faculty and staff are expected to spend funds prudently. Travel and entertainment expenses will be paid or reimbursed by the University if they are reasonable, appropriately documented, properly authorized, and spent within the standards of this policy. Likewise, approvers of travel expenses are expected to review all the required forms for authorization and reimbursement in detail, verify the validity of the expenditures in accordance with the University policy, attest to the accuracy of the form and sign the form only if they are in agreement with the amounts expended and/or due to the faculty or staff member.

Travel Authorization

Before travel commitments are made by the University of Mount Union, the [Pre-Travel Planning Form](#) must be completed and approved. The form must be submitted to the traveler's authorized approver at least ten (10) days prior to domestic travel and six (6) weeks prior to international travel. Vice Presidents are required to submit their authorization form to the President for approval. This form also provides the Business Office with the account information for charges, as well as necessary details of the trip, including any direct-billing for travel. ***It is solely the responsibility of the traveler to complete this form and obtain proper signatures before a University-related trip is authorized, regardless of who is paying for the travel.***

Travel Advance

Travel advances may be given to faculty, staff or students traveling on official University business. A [Travel Cash Advance Request Form](#) must be completed and approved at least two weeks in advance of the trip. This form authorizes a faculty or staff member to receive a cash advance and requires appropriate signatures from a Department Chair/Supervisor, as well as a Vice President for approval.

Cash advances should only be used for cash needed for items such as taxis, tolls, tips, and meals. The travel advance cannot be issued for airfare, lodging, conference fees or any other substantial fees that can be prepaid, prearranged, invoiced or charged to a University Purchasing Card. Cash advances for expenses are temporary and must be settled within fifteen (15) days after a trip has occurred. If the advance is not

returned or documented properly within sixty (60) days, this amount will be deducted from the employee's paycheck. A new travel advance will not be permitted if the traveler has outstanding travel advances. Failure to properly account for travel advances in a timely manner may result in suspension or cancellation of travel privileges.

Direct Bill

Before requesting travel arrangements for direct billing through any travel agencies, the [Pre-Travel Planning Form](#) needs to be completed and approved. This form provides the account information necessary for the Office of Business Affairs to pay the direct-billings to the travel agencies.

Transportation

It is expected that when traveling on University-related business, the traveler will use the most economical mode of transportation necessary for the trip. Use of air or rail travel, University fleet vehicles, rental cars, chartered buses, and personal vehicles all are accepted travel modes for faculty, staff and students pursuant to the guidelines below.

As a guideline, use of an automobile or van may be considered versus commercial air transportation for travel within a radius of 500 miles of the University. Proper consideration should be given to the cost of operating the automobile versus the cost of commercial travel. The University will reimburse on the lowest-cost alternative chosen.

Air/Rail Travel

The University of Mount Union covers the cost of coach class tickets. Any upgrades, enhancements, or additional travel insurance (see insurance section for more details) are personal expenditures and will not be reimbursed by the institution.

Travelers must book the lowest priced nonstop coach class airfare available. If the super-saver airfare restrictions require the traveler to extend the amount of time spent on travel, the employee should attach an analysis of these savings with the [Pre-Travel Planning Form](#). The lowest cost alternative must be taken unless otherwise approved by a University Vice President. If the employee would rather drive when air travel is the lowest cost alternative, the lower amount will be reimbursed to the employee. An analysis of the lower cost alternative should be attached to the [Pre-Travel Planning Form](#).

Airlines may assess a penalty ranging from 10 to 100 percent for cancellations, so ensure that your flight plans are in place to avoid this penalty. Travelers should note that the University will not reimburse any airfare purchased with personal funds until the related travel is completed. Also note the University only allows for one checked bag per flight unless specific business reasons exist that would allow more baggage.

Mount Union also has set up direct billing services with Traveline Travel Agency, Inc. that can book and confirm all requests for airline, hotel and car reservations in accordance with University of Mount Union's guidelines on travel. The contact information for Traveline is listed as follows:

Traveline Travel Agency, Inc.
1-800-635-7563
8:30 am – 5:00 pm

After Hours/Weekends: 1-800-343-5032

Fax: 330-747-5102

www.travelinetravel.com

They may charge a fee per ticket issued. When booking reservations, the department number to be charged must be given to the travel agency. Employees are encouraged, but not required to use these agencies, especially if the travel arrangements have the possibility of being changed or cancelled. Flight insurance is also provided in the amount of \$250,000 when booking your air travel through these agencies.

The traveler may utilize internet providers such as Orbitz, Expedia and Travelocity if they provide the lowest cost alternative for the traveler. Reimbursement for the travel will be made after the trip has taken place. Boarding passes will be required for reimbursement of air travel and should be turned in as documentation that the travel has taken place.

University-owned Fleet Vehicles

The University of Mount Union maintains a small fleet of vehicles available for business travel. An authorized driver may request the use of a fleet vehicle by submitting a [Vehicle Request Form](#), approved and sent to the Senior Coordinator of the Physical Plant Department at least seven days in advance of the travel in order to reserve a vehicle. The [University Fleet Policy](#) outlines the requirements to become an authorized driver, which includes a review of a Motor Vehicle Record (MVR) and successful completion of an on-line defensive driver module at least once per year. The policy also covers proper reporting after use of the vehicle, accident procedures, and athletic travel. Records of completed MVR and driver training modules will be kept in Human Resources.

Drivers who do not become eligible, do not successfully pass the requirements of an MVR, fail to follow the Fleet Policy, or lose driving privileges are not permitted to use a fleet vehicle.

Remember that when you are driving a University-owned car or van, you are representing the University of Mount Union by displaying its logo on the door of the vehicle. Thus, you should be responsible and convey a positive image. Driving aggressively or speeding is unacceptable and will result in loss of driving privileges. Drivers will be responsible for all moving violations and parking tickets while driving a University vehicle.

The costs for the use of a fleet vehicle will be charged directly to the department account of the traveler on a monthly basis. Any reimbursable charges accrued when using one of these vehicles, (fuel, tolls, other vehicles expenses) will be reimbursed at the actual costs paid by the traveler.

Personal use of University-owned fleet vehicles is not permitted under any circumstances.

Rental Vehicles

When a fleet vehicle is not available, travelers can secure a rental vehicle paid for with University funds when it has been determined in advance that the rental is necessary for conducting University-related business and other forms of transportation are either not available or more expensive. All rentals should be at the corporate rate or the lowest possible rate per day. Contact the Office of Purchasing and Risk Management for details. When traveling in groups, sharing of cars is encouraged to reduce costs. Fuel cost will be reimbursed based upon actual fuel purchased, not mileage. Rental vehicle usage should be approved by your supervisor or area Vice President/Dean.

Students will not be permitted to contract for a rental or leased vehicle on behalf of the University without Vice President or Dean approval.

An intermediate sedan is sufficient for most travelers on University business. Upgrades to a more expensive car or SUV are not permitted without pre-approval by your Area Vice President as shown on the pre-travel request form. No luxury cars, sports cars, or 15-passenger vans are permitted as rentals. Travelers are encouraged to rent hybrid and fuel-efficient vehicles when available and rental costs are similar to those of conventional vehicles.

When traveling by air to a location where alternative forms of transportation are available (taxi, hotel shuttles, public transportation, etc.), use of a rental vehicle may not be the most cost-effective way to get from place to place. Travelers should assess the amount of travel, access to and cost of alternative forms of transportation versus rental fees, parking fees, and other expenses to determine if a rental car is needed.

Collision damage insurance (CDI), personal accident insurance (PAI) and liability insurance supplements should always be declined when traveling within the United States; if elected, this insurance is **NOT REIMBURSABLE**. The University's insurance will cover the costs of damage to a rental car, however the applicable deductible will be charged to the individual or department. The Collision Damage Insurance for international travel is the only approved rental insurance expenditure.

Charter Buses

Groups of 12 or more passengers may want to consider the use of a charter bus service. Please refer to the [University Fleet Policy](#) and to the Senior Coordinator of the Physical Plant Department for additional details. Charges to a departmental cost center will include, but are not limited to, use of the outside company, any overnight accommodations, tolls and any parking fees. Users of a commercial or charter bus company are encouraged to get a quote for the trip in advance of scheduling.

If a charter company is used for transportation, contracted drivers can only drive for up to 10 hours a day and must take periodic breaks as required by law. For overnight trips, drivers must be afforded their own hotel room and per federal law they are to be unreachable (e.g. their cell phone is turned off) for the duration of their mandated off time. If these requirements will affect your trip, they must be budgeted for accordingly.

Personal Vehicles

Any vehicle not owned, rented or leased by the University of Mount Union is considered a personal vehicle. The use of personal vehicles for approved University travel is reimbursable for business-related purposes based on a mileage rate as published by the Business Office annually. Before using a private vehicle for University travel, the traveler must have a valid driver's license and vehicle insurance coverage as required by the State of Ohio.

The traveler must document the mileage to the destination by the most direct route by attaching a printout for mileage from a reputable source, such as MapQuest or Google Maps. Gasoline purchased for a personal vehicle is not reimbursable, nor should it be charged on a University P-Card. Expenses incurred for mechanical failures or accidents, including personal automobile

insurance deductibles will not be reimbursed. Fines for parking or traffic violations are the responsibility of the traveler and also will not be reimbursed.

When using a personal vehicle for college-related business travel, the vehicle's insurance will be considered primary coverage for liability and physical damage in the event of an accident. It is the obligation of the owner of a personal vehicle being used to carry adequate insurance and be responsible for any deductibles under the policy. The University's auto insurance program may apply only if personal insurance limits are exceeded due to a catastrophic accident where a fatality or extremely serious injuries occur while driving on approved University business.

When traveling to an airport for business-related travel, it is more cost effective to use a personal vehicle and park it for the duration of the travel than to take a University fleet vehicle.

Lodging

The University will pay actual room costs at single rate accommodations, as supported by a detailed hotel bill, for each day that lodging away from home is required for business purposes. Travelers should choose good quality, but reasonably priced hotels whenever practical. When attending a conference, travelers may stay at the conference hotel even if it is not the most economical option available. In-room movies are not permissible travel expenditures.

Travelers are responsible for reserving their own accommodations and are encouraged to charge reservations using the University P-Card. Travelers should inquire about any educational or corporate discounts that may be available, and should request them when reservations are made, if applicable.

The University is exempt from sales tax on items purchased in Ohio due to the nature of our not-for-profit corporate organization and travelers are required to obtain sales-tax exemption(s) where permitted. This also includes some lodging and meal taxes. Normally local occupancy taxes are not available for exemption. Forms are available in the Office of Business Affairs to be granted this exemption on purchases. State exemptions are also available in Florida, Virginia, New York, Kentucky and New Mexico.

It is the responsibility of the traveler to cancel any room reservation that will not be used. A record of the cancellation number should be retained in case of any billing disputes. If a traveler fails to cancel a reservation in a timely manner, he/she will be held responsible for cancellation fees.

No lodging reimbursement is allowed for travel 75 miles or less (one way) from traveler's place of work, for less than 24 hours.

Meals and Entertainment

Individual meals will be reimbursed for reasonable meal expenses incurred while traveling or entertaining on University business. Fiscal prudence should be used when the traveler is having meals while away from the University. A detailed list of items purchased must be provided in order to get reimbursed. Payment or reimbursement is made using the "Actual Expense Method;" however actual expenses should not exceed \$55 per day. Major cities will be paid at a rate of \$65 per day and include Boston, Dallas, Las Vegas, Los Angeles, New Orleans, New York, San Francisco, Seattle and Washington DC.

Individuals may need to follow their own departmental limits that may be lower if they are frequent travelers. University advancement staff entertaining potential donors will also be required to follow their departmental limits.

According to the IRS guidelines, meal and entertainment charges for business guests are reimbursable when names, positions or titles, and the organizational affiliation of the guest, along with the business purpose are indicated on the supporting documentation. Payment of personal meals for families or guests of travelers are not permissible. Original receipts are required for any meal or entertainment expense \$25 or over. Photocopies of invoices, credit card statements or record of charge slips accompanying the monthly billing statement are not acceptable. Details of the business discussion should be included in the appropriate section of the [Travel and Miscellaneous Expense Reimbursement Form](#) or on-line P-Card reporting (see [Payment and Reimbursement Policies](#) in a later section).

Alcoholic beverages are not considered a reimbursable expense unless approved in advance for business entertainment purposes, such as donor-relations' events. In no case will more than 20% of the total billable meal expenses be reimbursed for alcohol.

When meals are included in the price of a workshop or conference, meals taken elsewhere are not reimbursed.

Meals will be reimbursed according to the reasonable amount of time spent on travel during the day. Tips should be reasonable and will be reimbursed at a maximum of 20% of the employee's total meal charge.

Entertainment expenses are considered personal expenses and are not reimbursed unless entertaining guests of the University, in which case expenses of both the guest and University representative will be allowed with proper documentation and approval by a Department Chair or Supervisor. Examples of entertainment expenses include in-room movies, video games, cinema, sporting events, theater, night clubs, golf, bowling or other similar expenses.

On-campus meals and entertainment

When only University faculty and staff are at a campus function, the meals and/or refreshments can be paid for with institutional funds only if all the following requirements are met:

- If the meal or refreshments are ordered from and provided by AVI.
- The activity lasts at least 60 minutes
- The activity is considered training, a workshop or departmental meeting or retreat. This includes student recognition events, official graduation or retirement receptions and volunteer appreciation events.
- The activity meets the definition of an employee working meal, as defined by the IRS to be one with a documented agenda.

When only faculty and staff are at a function off campus, approval for the meal must be provided by the appropriate Vice President and follow similar guidelines. ***Off campus meal or entertainment expenses for a departing employee are not acceptable business expenses under this policy.***

Registration fees

Conference registration fees should be paid for by using the University P-Card. If the organization does not accept the credit card, the [Pre-Travel Planning Form](#) should include a copy of the registration form and a request to Accounts Payable to pre-pay the fee. When submitting the final expenses for the trip, any such fees paid in advance by the University should be listed in the "paid by Mount Union" section of the [Travel](#)

[and Miscellaneous Expense Reimbursement Form](#). Mount Union will not pay for any conference or workshop expenses unless supervisory approval is received.

International Business Travel

All international travel must be pre-approved under the policies above and reimbursed in the same manner as any domestic business travel. Expenses must be submitted in U.S. dollars with an explanation and translation of the foreign receipts. Travelers must use the currency rates in effect on the date when the expense was incurred. Such rates can be obtained at www.xe.com or www.oanda.com

Travelers should contact the Center for Global Education at (330) 829-3864 for essential information prior to international travel, including a review of the [Travel Warning Policy](#). In no event will a member of the faculty or staff, or a student traveling for University-related purposes, be permitted to travel to countries with an active embargo or a level 3 or level 4 travel advisory in place. This policy also applies to undergraduate and graduate study abroad, faculty-led trips or any University function that seeks academic credit, University funding or financial support, including faculty/staff travel on University business. Travelers must consult the U.S. State Department at <http://www.state.gov/travel/> to determine if this applies to your destination country.

Spousal Travel

All travel by spouses of faculty and staff will be reviewed and a specific determination made as to the University's need and business purpose. The responsible Vice President, applying the following criteria must approve such requests for spousal travel.

In some cases, it will be determined that there is a bona fide business purpose for the spouse to travel and represent the University at a particular function. In such cases, the University will provide approval, and the travel expenses of such spouse may be paid by it in accordance with the University's travel policy. To be a bona fide business purpose, the presence of the spouse must be **essential** (not just beneficial) to the employee being able to carry out his/her business purpose for the institution. The spouse's performance of some incidental service does not make it a bona fide business expense. An employee's spouse performing menial tasks (such as typing notes) and/or accompanying the employee to luncheons and dinners is not a bona fide business purpose. The spouse must perform substantive business-related functions. The bona fide business purpose of the accompanying spouse must be clearly documented on the employee's expense report so that there will be no tax consequence to the employee.

In other cases, it will be determined that it would be desirable, but that it does not serve a bona fide business purpose to the University, for the spouse to attend a function on behalf of the institution. In such cases if the University approves the reimbursement of the spouse's travel, it will be necessary, under IRS code, to include such reimbursement in the employee's taxable wages as a taxable fringe benefit.

In any other cases, a spouse's travel will be the personal responsibility of the employee.

Miscellaneous Travel Guidelines

- If a traveler makes his/her own reservations but would like the University to pay for expenses such as registration and lodging in advance, the [Pre-Travel Planning Form](#) should include appropriate documentation and be submitted to the Office of Business Affairs after approval by a Department Chair or Supervisor. **The Office of Academic Affairs also requests that travelers complete specific**

forms required by the Vice President and Dean of the University. Please contact the Office of Academic Affairs for instructions regarding these forms.

- Faculty and staff traveling on University business, either domestically or abroad are automatically covered by the institution's Travel Accident Insurance policy at no cost to the traveler. Additional travel insurance is available by charging the airline ticket to the Corporate Card. Details are available by contacting the Office of Business Affairs. Additional insurance may be suggested while traveling abroad. Please consult your personal insurance agent for additional information.
- If traveling with University-owned property, such as a laptop or other University-owned equipment and damage or theft occurs, the traveler's department will be responsible for the insurance deductible.
- A trip involving both University business and personal purposes is acceptable as long as there are no additional costs to the University. Such a trip requires the traveler to separate the expenses between the University and personal activities. For example, a University faculty or staff member that combines a conference with a vacation may seek hotel and meal reimbursements only for the conference portion of the trip. Travel expenses for any non-University person(s) will not be reimbursed by the institution. **University business insurance coverage will not apply during the personal or vacation travel.**
- Departments may reimburse prospective faculty and staff, guest lecturers or other official visitors in accordance with the travel policy for authorized travel expenses incurred in connection with their travel to Mount Union. Reimbursement requests should be made as outlined in the **Reimbursement and Payment Reference Section** of this policy below.

Payment and Reimbursement Policies and Procedures

Various payment methods can be used for University-related business expenses, including the use of the University's Purchasing Card program through Huntington Bank (P-Card), use of personal funds or credit cards, wire transfers and University checks.

Purchasing Card Program

The primary and most efficient way to pay for University-related travel expenses is through our P-Card program to help manage travel expenditures. Whenever possible, use of the University P-card is the preferred way to pay for travel expenses. Faculty and staff members that have over \$2,500 in yearly spending are required to use the purchasing card. The use of this card benefits the University by reducing cash outlays and providing rebates for purchases. This card is available by making application through the Office of Purchasing and Risk Management after approval by the faculty or staff member's Department Chair or Supervisor.

Transactions using the P-Card require that original receipts be retained as proof of purchases for transactions over \$25. Cardholders are responsible for reporting expenditures on a monthly basis through the required Huntington Bank on-line system and submitting an approved expense report with original receipts to Accounts Payable within the Office of Business Affairs.

Travelers receiving this card must sign a cardholder agreement that outlines specific responsibilities and procedures regarding the use of this card. Cardholders must comply with the policies outlined in the [Purchasing Card Policy](#), assure that they stay within the limits assigned to the card, resolve

disputes with vendors, review all transactions on a monthly basis and submit timely reporting to the Business Office by the 25th of every month.

Cardholders who make unauthorized purchases and/or are found to be careless with the card or are late with required reporting will lose card privileges and be subject to disciplinary action. Additionally, cardholders may be held personally liable for the amount of any such transactions and any administrative fees charged in connection with the misuse of the card.

Personal Funds or Credit Cards

While the University P-Card is the preferred method for payment of travel expenses, those without access to a card, including students and non-employees of the University, may use personal funds or a credit card to pay for such expenses.

Wire Transfers

Wire transfers may be used in specific situations to pay for travel expenses. For further information, please contact the Controller within the Office of Business Affairs.

University Checks

Travel expenses may be paid by University check with submission of a Purchase Order with acceptable documentation and signed by a Department Chair or supervisor.

Reporting and Documentation Requirements

Regardless of the payment method utilized, original detailed receipts and proper expense reimbursement forms for each transaction are required. All itemized receipts should include the name and the date of the establishment, as well as the amount charged.

The University uses two methods for reporting business-related expenses:

1. Travel expenses incurred by using the University [P-Card program](#) requires the traveler to utilize the on-line reporting system on a monthly basis through Huntington Bank. The final report should be signed by the Department Chair or Supervisor and include attachments of all receipts of transactions by the 25th of each month.
2. Any travel expenses incurred without the Use of the P-Card (such as mileage in a personal vehicle, cash for meals, tips, etc.) must be submitted on the [Travel and Miscellaneous Expense Reimbursement Form](#).

Once the employee has completed either of the types of reports required, a printed form should be sent to the Department Chair/Supervisor for approval signatures. The applicable form with all **original receipts (photocopies are not acceptable)** greater than \$25 should then be forwarded to accounts payable after the trip has concluded. If the forms and corresponding receipts are not submitted, a notice will be sent to the employee and supervisor. **Reimbursements will not be made until all documentation is received and reviewed by Accounts Payable.**

Even if no reimbursement is due to the employee, the completed reimbursement form or on-line purchasing card report must be filled out to substantiate all business-related expenses. After the

reimbursement form has been audited for compliance, the reimbursement will be directly deposited to the account that the traveler has designated on the [Accounts Payable Direct Deposit Authorization Form](#).

Anyone submitting expenses for Faculty Development should refer to the [Faculty Handbook](#) for additional guidelines.

Standards of expense accounting are those generally specified by the Internal Revenue Service. Further guidance on these rules can be found in [IRS publication 463](#) at www.irs.gov.

Responsibility of Accounts Payable/ Business Office

The Accounts Payable Department and the Business Office are responsible for the following:

- Review of forms and attachments for completeness, accuracy, reasonableness and compliance with government regulations and University policies
- Verification of required approved signatures
- Ensuring proper tax treatment of taxable income items and compliance with IRS regulations

As stated, and in order to comply with IRS regulations, Mount Union faculty and staff must reconcile University travel expenses within 60 days of completion of travel. If expenses are not submitted within 60 days, any University-paid expenses will be considered taxable income to the employee and will be treated as such.

University-related travel expenses incurred using personal funds will be ineligible for reimbursement after 120 days and must be settled for the fiscal year by July 21 annually.

Reimbursement for Gifts/Gift Cards/Gift Certificates

[IRS Publication 17](#) provides very specific guidance regarding taxable income of gifts given to employees and nonemployees which are paid with institutional funds. Cash and cash equivalent fringe benefits such as gift cards/certificates have a readily determinable value and as such do not constitute de minimis fringe benefits regardless of the face amount of the gift card/certificate. Also, gifts purchased with university funds having a retail value of twenty dollars or more are also not considered de minimis for tax reporting purposes and are considered gifts under this policy. For employees, gifts under this policy are considered compensation and will be subject to federal, state and employment tax withholding and reporting on the form W-2. For non-employees, the value of all gifts and gift cards/certificates under this policy in aggregate amount of \$600 or more per calendar year will be reported on IRS form 1099-Misc as other compensation. Also, gifts and gift cards/certificates given to nonresident aliens are subject to federal tax withholding. See detailed requirements at [Gift and Gift Card Policy](#).

Insurance Requirements

Travel-Accident Insurance

The University of Mount Union covers faculty, staff and students under a travel accident policy, which provides 24-hour protection in the event of accidental death or dismemberment while traveling on University-related business. Worker's compensation may also apply in cases of injury or death arising out of and in the course of University employment.

Involvement of an incident that results in a claim must be reported to a Department Chair or Supervisor, Human Resources and the Business Office immediately. Insurance questions can be directed to the Business Office.

Mount Union's insurance program does not cover aircraft liability associated with non-commercial air travel, personally owned, rented or borrowed aircraft for traveling on University business. Please notify the Office of Business Affairs before considering the use of a privately chartered aircraft.

Mount Union will not pay for or reimburse faculty, staff or students for accidental death or life insurance.

Auto Liability Insurance

Mount Union owned/rented vehicles are insured under the University's auto and liability policy within the domestic U.S. and Canada for all approved drivers. Approved drivers who are renting a vehicle should not purchase the "collision damage waiver" offered by rental companies. Please consult the [Fleet Policy](#) for further details and for accident procedures while traveling.

As stated, when using a personal vehicle for college-related business travel, the vehicle's insurance will be considered primary coverage for liability and physical damage in the event of an accident. It is the obligation of the owner of a personal vehicle being used to carry adequate insurance and be responsible for any deductibles under the policy. The University's auto insurance program may apply only if personal insurance limits are exceeded due to a catastrophic accident where a fatality or extremely serious injuries occur while driving on approved University business.

Other

Mount Union does not carry insurance for loss of, or damage to, luggage or other personal effects during travel. If such damage occurs, seek reimbursement through your personal insurance company.

Loss of University-owned property must be reported immediately to the police, as well as your Department Chair/Supervisor and to the Business Office. A police report is needed for a claim. The department will be responsible for any insurance deductibles.

Non-Allowable Travel Expenses

The following list is presented only as a guide and is not intended to be a complete list of expenses which are not allowable by the University.

- Alcohol, other than as described in the policy
- Any type of travel insurance in addition to the amount provided by the University or the Corporate Card
- Portion of travel for personal use, including spousal travel
- Upgrades – air, hotel or car rental
- Personal clothing or hygiene items
- Unused transportation or hotel reservations not properly cancelled
- Personal travel/frequent flier rewards
- Vehicle washes

- Traffic fines, court costs, parking violations and personal auto repairs
- Personal expenses such as movies, snacks, spa, haircuts, reading material, toiletries, etc.
- Theft, loss or damage of non-business-related personal property
- Child-care, kennel costs, pet or house-sitting fees
- Mileage to and from employee's home and primary office
- Laundry expenses for trips less than seven (7) days
- Health club facilities or other personal memberships
- Sales tax on items purchased without using appropriate purchasing policy
- Birthday party gifts, cakes or other treats or gifts that are personal in nature, i.e. birthday gifts, shower gifts, wedding gifts, where there is no related business purpose.
- I-Tunes purchases
- Charitable or political contributions
- In-Flight phone access or wi-fi

Accident or emergency

In the event of an accident or an emergency, trip advisors should first attend to the injured, getting them the necessary medical assistance, and then determine what condition caused the injury or illness. Once the injured persons have been appropriately attended to, the trip leader should then contact Mount Union Security (330-428-1344) and the Office of Student Affairs immediately to notify them of the accident, any injuries and/or property damage to a University or another vehicle.

The advisor is required to fill out a ***Travel Incident Form*** ([link](#)) and should initiate steps necessary to find the root cause and prevent similar incidents in the future by:

- Assessing the specific sequence of events that led to the emergency
- Assessing the conditions that may have contributed to the emergency
- Obtaining statements from eyewitnesses, if available

Students are responsible for their own medical insurance coverage and personal property coverage for University travel with faculty or staff, just as they are when they are attending classes on the Mount Union campus. The University does not reimburse for medical expenses or the loss or damage of personal property of faculty, staff or students during a trip.

Emergency Planning and Trip Contingencies

The type of trip dictates the level of emergency planning needed. If the trip location is remote, it is strongly recommended that at least two persons on the trip have first aid skills and carry a cell phone. Confirmation that cell phones work from the site should be made in advance so that alternative communication arrangements can be made.

Even with the best planning, things can go wrong. Trip advisors are asked to try to anticipate what complications could arise and then develop contingency plans in advance of the trip. Examples include if a student has to leave early due to a personal or family emergency; a student violates trip rules; or for weather or transportation delays/cancellations.

If students have disabilities or special requirements that may need to be accommodated, please refer to the Office of Student Accessibility Services for more information at (330) 823-7372.

Travel funding

Travel funding may be made available from department budgets or personal funds to make up the amount of funding required to conduct a travel event. In all cases, cash or checks collected by a faculty or staff member from a student to defray costs of a trip must adhere to the [Cash Handling Policy](#) and be deposited with the Business Office immediately. The [Academic Travel Request / Authorization Form](#) details the pre-trip estimate and source of funds required to be completed before traveling.

Special or Higher Risk Activities

Participants must be made aware of and accept any “special activities” as part of the travel plans. A “special activity” shall include any activity that may expose the participant to an unusual risk of bodily harm or injury or may require an unusual physical exertion. “Special activity” shall expressly exclude normal physical education classes and University approved sports or sport team activities for which independent procedures have been developed. Any trips that require special activities that expose a traveler to risk of injury or physical exertion should be outlined in the [Student Release, Hold Harmless and Indemnification Form](#) and signed by the participant.

At times, the trip destination, organization or establishment may require a Certificate of Insurance from the University of Mount Union prior to the event participation. If asked to provide this document, please contact the Office of Purchasing and Risk Management in order to provide the appropriate document to other parties. You will need to provide that office with the site contact name, organization name, address, phone number, email, fax and dates of trip or facility use.

Deviations from Travel

In certain situations, students may wish to deviate from group travel plans, such as requesting to drive their personal vehicle or make their own travel arrangements. Students should be ***discouraged*** from doing so and must be made aware that they will be traveling at their own risk and understand that the University’s auto insurance will not respond to an accident or claim while using a personal vehicle. Students who diverge from established travel plans during the trip for personal excursions are not covered under the University’s travel/accident coverage and must complete a specific [Student Release, Hold Harmless and Indemnification Form](#) that verifies they are taking their own risks by deviating from the group’s travel. Students who violate this policy are subject to disciplinary action from the Office of Student Affairs.

Student Organization Travel

Overview & Definition of Student Organization Travel

The University of Mount Union defines *Student Organization Travel* as any off-campus experience that is sponsored by a recognized and registered University student organization. The Office of Student Involvement and Leadership maintains a comprehensive list of all recognized and registered student organizations, defined as those groups that have a current semester roster and constitution on file with the office. Such travel may include field trips, retreats, conferences, conventions, competitions, workshops, off-campus speakers, rallies and other such events. Student organization travel must be approved by the organization's faculty/staff advisor and should support the mission of the organization. Student organization travel may not create any undue interference with academic responsibilities. Final approval must be given by the VP for Student Affairs and Dean of Students or the Associate Dean of Students before such a trip can take place.

These travel guidelines do not pertain to certain situations including, but not limited to, internships, rotations/clinicals, study abroad and student teaching. The Office of Academic Affairs will maintain information for these exceptions. In addition, student travel with faculty for academic trips fall under the section of this policy entitled [Students traveling with faculty/staff](#), which have very similar guidelines.

Failure to comply with these policies will result in revocation of travel funding for the entire organization for a length of time to be determined the Office of Student Affairs and may result in additional sanctions by the Office of Student Conduct. Students and faculty/staff are reminded that University policies are still in effect and apply to trips regardless of the location and/or funding. Please refer to the University's [Student Handbook](#), the [Employment Policies Handbook for Faculty](#) or the [Employment Policies Handbook for Staff](#) for further information.

Forms required of University-sponsored, in-town, less than 50 miles same day travel:

- [Release, Hold Harmless Agreement](#) (one from each student)*

**A blanket liability waiver may be signed for multiple same-day travel experiences, however, dates of such must be articulated in the liability waiver.

University-sponsored, one day travel – Any travel in which students leave and return to campus on the same day to a location more than 50 miles from the Mount Union campus or longer than eight (8) hours in duration, may occur with the following provisions:

- A campus advisor is encouraged to attend all University travel and must get permission from the Office of Student Affairs for students to travel without an advisor/leader.
- A faculty/staff advisor is **REQUIRED** to attend if traveling by van or bus. A copy of all forms **MUST** be maintained by the faculty/staff advisor during the trip with the original sent to the attention of the Associate Dean of Students within the Office of Student Affairs at least one week prior to the trip.

Forms required of University-sponsored one day travel:

- [Emergency Medical Form](#) (one from each student)
- [Release, Hold Harmless Agreement](#) (one from each student)*
- [Student Organization Travel Planning Form](#) (one from the student organization)
- [Student Travel Agreement](#) (one from each student)

Overnight travel – Any overnight travel for one or more nights. On Overnight events, it is recommended that the presence of a minimum of one student/faculty staff advisor for every twelve (12) students in attendance is followed. A faculty/staff advisor or another assigned faculty/staff person as trip supervisor must attend all overnight travel trips of 3 or more students. A copy of all forms MUST be maintained by the faculty/staff advisor during the trip with the original sent to the attention of the Associate Dean of Students within the Office of Student Affairs at least one week prior to the trip. All trip supervisors, including faculty, staff, and volunteers.

Forms required of University-sponsored one day travel:

- [Emergency Medical Form](#) (one from each student)
- [Release, Hold Harmless Agreement](#) (one from each student)*
- [Student Organization Travel Planning Form](#) (one from the student organization)
- [Student Travel Agreement](#) (one from each student)

****If the student is under the age of 18, this form must be signed by a parent/guardian***

Copies all forms **MUST** be maintained by the **travel supervisor** during the trip, with the originals sent to the attention of the Associate Dean of Students in the Office of Student Affairs **at least one week prior to the trip.**

Any faculty, staff or volunteers traveling on the trip on behalf of Mount Union must complete the [Emergency Medical Form](#) and the [Release, Hold Harmless and Indemnification Agreement](#) and also provide copies as indicated above.

Planning a trip

1. Select a Travel Supervisor

For any travel, the student organization must select someone to serve as the Travel Supervisor. The role of the Travel Supervisor is to lead the planning of the trip and to serve as a liaison between the trip participants and the University. Only in the case of same day or one day travel, the Travel Supervisor may be a student leader – someone who is at least 18 years of age and is in good standing (academically, conduct, financial) with the University. Otherwise, travel supervisors are to be faculty, staff, or administrators employed by the University, including the student organization's own campus advisor.

A travel supervisor is required to be put in place to oversee student organization travel, adhering to the following responsibilities throughout the trip:

- Obtains necessary information of all participants
- Obtains proper signatures on all forms
- Maintains a travel roster and all applicable forms while traveling
- Travels with the student organization to and from the trip locations (unless permission is given for students to travel without a member of the faculty or staff)
- Confirms the safe arrival of the group to the University
- Stays with students in housing or lodging for the duration of the trip
- Serves as the emergency contact throughout the entirety of the trip
- Completes and submits an itinerary of the trip to the University; adheres to its details throughout the trip
- Develops an emergency plan appropriate for the trip and its location(s). *Consider items such as first aid kits, first aid training, and contingency plans if the leader must leave the group.*
- Confirms the proper means of communication and the ability to use cell phones
- Responds to crisis and emergency situations based on those pre-developed plans

- Complies with all University travel policies, as well as other policies regarding code of conduct, alcohol and drug use, human resource policies, and sexual misconduct
- Maintains the recommended 12:1 student-to-faculty/staff/administrator ratio

A ratio of 12:1 student-to-travel supervisor is recommended, unless permission is granted by the Office of Student Affairs. It is recommended that additional faculty, staff, and/or administrators serve in back up roles, especially for driving or emergency situations. For groups with 3 or fewer students, a student leader may be appointed.

The travel supervisor must carry enough cash or credit on their person to resolve reasonably foreseeable problems. Use of the University purchasing card is the recommended source for travel. A cash advance may be obtained through the business office for this purpose (see Purchasing Card Program within the Traveling on University-related business section). Student Senate funding is not available for cash advances.

2. Documentation & Records

As stated, all student organizations must submit, as part of their documentation, a written request for approval to travel, called the [Student Organization Travel form](#). The Travel form must include all required information and a detailed itinerary outlining:

- The purpose of the travel
- The dates and destination of travel
- The estimated number of students participating in the travel, and a list of their names
If there are changes to the participant list, the travel supervisor provides the updates to the Office of Student Affairs prior to departure. If a trip participant chooses not to travel, that update is also provided to the Office of Student Affairs prior to departure.
- The names of University representatives traveling with the students
- The name of the travel supervisor and their contact information used while on the trip
- The budget for the trip
- The mode of transportation (including the names of drivers if University vehicles will be used)
- Any other pertinent information concerning the trip

At least ten (10) days prior to travel, the travel supervisor should provide a written summary to all trip participants. This summary must include:

- times and dates of departure and return
- travel itinerary and route (including flight numbers and times, if applicable)
- rest and meal breaks
- name and address of overnight accommodations
- costs to be paid by participants
- a packing list including recommendations for clothing
- the names and contact information of University representatives traveling with the students
- any other pertinent information

If traveling to different locations, the travel supervisor must provide separate lists of participants by destination/location to clarify for the University who is traveling to each location and who can be contacted in the event of an emergency at each.

Travel Supervisors should consider the nature of the trip and review documentation to ensure that language is clear and accurate when providing information to participants or preparing informed consent forms or release statements. Written records that should be obtained in advance of the field trip should

be clearly filled out and easily accessible. The Travel Supervisor should maintain a copy and a copy must be provided to the Office of Student Affairs no later than one week prior to travel.

The Office of Student Affairs must be notified immediately by the trip advisor of any emergencies or issues that arise on the trip. If the Vice President of Student Affairs or Associate Dean of Students is not available, the trip advisor should contact Campus Security, who will assist with further communication.

Upon return from the trip, the trip advisor must provide the Office of Student Affairs with a written summary of any issues or concerns regarding the trip, and any other information or recommendations that might be relevant or helpful in planning future trips. The Office of Student Affairs maintains trip records for a period of seven (7) years before destroying, in accordance with the University's Document Retention Policy. Trip surveys may also be administered to all members that participate.

3. Destination

The Travel Supervisor should be familiar with the destination and prepare a site safety plan to present to participants. Lodging premises and locations should be reasonably safe or written documentation provided should outline associated risks.

Orientation for travel participants should include an overview of the itinerary and any procedures for a "buddy system." Each pair operates together as a single unit so that they can monitor and assist one other throughout the trip.

All trip participants should be provided information on known risks as well as local, cultural, custom and legal requirements.

4. Special Requirements for Participation in the Trip

If any students have disabilities or special requirements that may need to be accommodated, please make sure to contact the Director of Student Accessibility Services at (330) 823-7372.

5. Trip Expectations

Travel Supervisors should provide participants with some form of orientation prior to departure. The type of trip will dictate the level of detail needed in the orientation, but both verbal and written communication is essential. Materials should include the trip destination and purpose, a travel itinerary, route, rest and meal stops, lodging and transportation information, appropriate clothing or gear, and the established rules and protocols specific to the trip. In addition, materials should include a summary of activities and physical requirements students will encounter; any known or unusual circumstances that would require advance preparation or equipment; and any known unique hazards.

If multiple vehicles are being taken to the trip destination, each vehicle must have printed directions to the destination and the contact information for the other trip participants and Campus Security. All vehicle drivers should know what to do if the vehicles become separated (i.e. meeting spots, driving on to destination, etc.).

6. Compliance with University Policies

All participants must understand that University policies for faculty, staff and students are still in effect and apply to trips regardless of the location.

Instructional activities and settings should be consistent with University policy including, but not limited to policies on alcohol and drug use, vehicle use, sexual harassment, and student conduct.

Use of alcohol or drugs while on a student organization trip is prohibited. University representatives may not provide alcoholic beverages to any student, consume alcoholic beverages in the presence of any student, or be present when any student is consuming alcoholic beverages, regardless of the age of the student(s).

Conduct during travel

As outlined in the [University Student Handbook](#), all students taking part in University-sponsored activities or trips are responsible for adhering to the policies and procedures included in the Student Handbook and other official documents and publications. Actions detrimental to the mission of the University and to the legitimate activities of the academic community are in violation of the University policy and will be subject to the University's student conduct process.

Although cultures, customs, values, policies, and laws may differ in foreign countries or in different communities, the expectations of Mount Union students do not. Should the expectations of the host country, institution, or agency be more stringent than those of Mount Union, however, Mount Union students must abide by them, as well. In short, Mount Union's students are responsible for behaving in a manner that reflects positively on the University.

Students whose behavior significantly detracts from the educational purposes of the trip or has the potential to threaten the physical or emotional wellbeing of other participants may be sent home at the request of the host institution or agency or at the discretion of the travel supervisor and/or chaperone(s), the Associate Dean of Students, or the Director of Student Conduct, potentially at the student's expense. Please remember that participation in off-campus programs is a privilege and not a right.

While it is impossible to provide students with an all-inclusive list of inappropriate and/or prohibited behavior, specifically while traveling, the following offers a framework for those participating in University-sponsored trips and the following guidelines should serve to further clarify the University's expectations. Egregious disregard for expectations, guidelines, laws, and/or rules may be grounds for conduct action, including the student's exclusion from the remainder of the trip or activity.

Please keep in mind the following as the student organization engages in travel:

1. **Attendance and Free Time.** All students participating in University-sponsored trips are expected to attend all functions associated with the program, including, but not limited to: meetings, meals, social gatherings, classes, and tours. Those who are routinely absent from or late to such activities may be sent home, held accountable through the University's disciplinary process, and/or required to reimburse the funding source for fees, fares, meals, hotel costs, etc. Students are encouraged to use their free time to safely and responsibly explore their surroundings (as agreed upon by students and travel supervisor), but such activities should not limit the students' availability or adversely affect the program itinerary. In addition, all students are expected to adhere to expectations about curfews, meeting times, transportation, group excursions, and the like.
2. **Alcohol and Other Drugs.** While domestic and international laws do vary with respect to alcohol and other drugs, students must adhere to both local laws and expectations when and where use of alcohol is permitted. Regardless of whether the use of controlled substances is allowed by law, drug use (including misuse of prescription drugs and use of medicinal marijuana and/or marijuana byproducts) is always prohibited. Students who abuse alcohol and/or other drugs, encourage others to do so, provide them to others unlawfully, or who behave inappropriately due to intoxication, may be documented and held accountable through the student conduct process. Those whose behavior

puts themselves or others in jeopardy or reflects a conscious disregard of the University's expectations will be sent home at their own expense.

3. **Sexual Assault and Harassment.** Mount Union does not tolerate sexual assault, harassment, stalking, domestic violence, or dating violence at home or abroad and will take swift and decisive action in responding to allegations of this nature. Students who believe they experienced sexual assault, harassment, stalking, domestic violence, or dating violence are encouraged to report such behavior immediately to group leaders who will follow guidelines included in the University's sexual assault and harassment policy as printed in the Student Handbook. In consultation with the Title IX Coordinator, student organization leaders will assist students in documenting the incident, ensuring their safety, exploring their options for resolving the complaint, and seeking out medical attention or counseling services.
4. **Harassment and Bullying.** Harassment may be direct and explicit or indirect and subtle. Words, gestures, graphics, and online activity may be construed as harassing if they target a specific individual or create a hostile or offensive environment for a group of people. Conduct that could reasonably be perceived as demeaning, offensive, intimidating, or threatening may require immediate staff intervention and be referred to the University for review through the disciplinary process.
5. **Disorderly Conduct, Theft, and Vandalism.** Students traveling or studying outside of the University should behave as though they were on campus; treating their surroundings and others' belongings accordingly. Student organizations are asked to practice respect for persons and serve as responsible stewards of facilities and property. Students who disrupt the learning environment, disturb others, steal, or vandalize property while on a University-sponsored trip will be held accountable through the University conduct process and may be required to pay restitution to those affected by their behavior.
6. **Compliance.** Traveling can be challenging, stressful, confusing, and at times, even dangerous. Consequently, to ensure the safety and wellbeing of all participants, travel supervisors, and chaperones will establish their own guidelines and expectations for the students for whom they are responsible. These may differ depending on the circumstances and may include curfews, travel restrictions, buddy systems, rules related to alcohol consumption, room assignments, etc. Participants are expected to follow their group leaders' directions and adhere to their expectations without question or complaint, regardless of the permissiveness of local laws or University policy. Those who ignore or challenge instructions from the travel supervisor and/or other chaperones may be found responsible for refusal to comply with reasonable requests of University officials.
7. **Sensitivity to Cultural Differences.** Values and customs differ across cultures, and students are expected to make a good faith effort to understand, appreciate, and even embrace these differences. While acknowledging that some students will be challenged by new experiences, the University maintains that students who willingly take advantage of travel opportunities should participate in expressions and demonstrations of the host's culture and traditions to a reasonable extent. This may include taking part in song, dance, cuisine, service, or conversation, and students should be mindful of the hosts' hospitality and cautious not to offend them by refusing their generosity. Students with phobias, dietary restrictions, disabilities, or other conditions that may inhibit their interactions should discuss these with their travel supervisor(s) and/or chaperone(s) prior to departure.

Students traveling with faculty/staff

Overview

The University of Mount Union defines students traveling with faculty or staff as any off-campus experience that is sponsored by a group not recognized as a student organization and is led by faculty or staff for academic or extra-curricular purposes. Such travel may include field trips, retreats, site visits to employers or other academic contacts, conferences, conventions, competitions, workshops, off-campus speakers and other such events. The travel must be approved by the respective Vice President to which the faculty/staff person (trip advisor) reports and should support the mission of the organization before such a trip can take place.

These travel guidelines do not pertain to certain situations including, but not limited to, internships, rotations/clinicals, study abroad, and student teaching. The Office of Academic Affairs will maintain information for these exceptions. In addition, student travel with student organizations fall under the section of this policy entitled [Student Organization Travel](#), which have very similar guidelines. These procedures for students traveling with faculty or staff are in place to ensure that appropriate information is available to those individuals who may need to contact travelers or families in case of an emergency.

Faculty should also consult the [Faculty Handbook](#) for other details and required forms with regard to field trips and other off-campus activities with students.

Failure to comply with these policies will result in revocation of travel privileges for the trip advisor and may result in additional sanctions by the respective Vice President. Students, faculty and staff are reminded that University policies are still in effect and apply to trips regardless of the location and/or funding. Please refer to the University's [Student Handbook](#), the [Employment Policies Handbook for Faculty](#) or the [Employment Policies Handbook for Staff](#) for further information.

For faculty, staff and students who plan to study abroad or conduct faculty-led international trips, please consult the Center for Global Education's [Faculty and Staff-Led International Travel Seminars Handbook](#) for procedures and special requirements. Payment methods, documentation and reimbursement procedures can be found in this document for proper payment of University-related expenses.

A trip advisor must be designated to oversee student travel with faculty or staff and must adhere to the following responsibilities

- To obtain necessary information of all participants, as detailed below.
- To get proper signatures on all forms, as required below.
- To maintain a travel roster and all applicable forms while traveling.
- To travel with students to and from the trip locations (unless permission is given for students to travel without a member of the faculty or staff).
- To stay with students in housing or lodging for the duration of the trip.
- To serve as an emergency contact for 24/7 throughout the trip period.
- To complete an itinerary of the trip and to adhere to its details.
- To develop an emergency plan appropriate for the trip and its location(s). Consider items such as first aid kits, first aid training, and contingency plans if the leader has to leave the group.
- To confirm proper means of communication within the group of students while on the trip.
- To be willing to respond to crisis and emergency situations based on pre-developed emergency plans or evacuation plans.

- To comply with all University travel policies, as well as other policies regarding the Student Code of Conduct, alcohol and drug use and sexual misconduct.
- It is recommended to maintain a minimum of a 12:1 student to faculty ratio.

Categories of Travel

1. One Day travel – A faculty/staff advisor is encouraged to attend all university travel and must get permission from their respective Vice President for students to travel without an advisor/leader. A faculty/staff advisor is REQUIRED to attend if traveling by van or bus. Trip roster and itinerary MUST be maintained by the faculty/staff advisor during the trip and original versions of all other forms sent to the attention of their respective Vice President and to the Associate Dean of Students within the Office of Student Affairs at least one week prior to the trip.
 - [Academic Travel Request /Authorization Form](#)– required for any trip led by a member of the Academic Affairs organization
 - [Pre-Travel Planning Form](#)
 - [Trip roster](#)– including important phone numbers
 - [Travel itinerary](#)
 - [Student Release, Hold Harmless and Indemnification Form](#) (under 18 requires parent/guardian signature)
2. Overnight travel – Any overnight travel for one or more nights. For overnight events it is recommended the presence of a minimum of one faculty/staff trip advisor for every twelve (12) students in attendance. A faculty/staff advisor must attend all overnight travel trips when there are more than three students attending. Trip roster and itinerary MUST be maintained by the faculty/staff advisor during the trip and original versions of all other forms sent to the attention of their respective Vice President and to the Associate Dean of Students within the Office of Student Affairs at least one week prior to the trip.
 - [Academic Travel Request /Authorization Form](#)– required for any trip led by a member of the Academic Affairs organization.
 - [Pre-Travel Planning Form](#)
 - [Trip roster](#) – including important phone numbers
 - [Travel itinerary](#)
 - [Student Travel Agreement](#)
 - [Student Emergency Medical Form*](#)
 - [Student Release, Hold Harmless and Indemnification Form*](#)
 - [University of Mount Union Travel Emergency Cards](#)

**If the student is under the age of 18, this form must be signed by a parent/guardian*

Any faculty, staff or volunteers traveling on the trip on behalf of Mount Union must complete the [Emergency Medical Form](#) and the [Release, Hold Harmless and Indemnification Agreement](#) and also provide copies as indicated above.

Specific Types of Academic Affairs Travel:

For specific types of Academic Affairs Travel, including conference travel or professional meetings, please consult the [Faculty Handbook](#) for detailed instructions and reimbursement guidelines. In addition, the [Faculty Handbook](#) details field trips and other off-campus activities with students. Those procedures should be followed in accordance with the requirements of the office of the Vice President for Academic Affairs.

Athletic team travel

Overview

The University of Mount Union is a Division III member of the National Collegiate Athletic Association (NCAA) and the Ohio Athletic Conference (OAC). The University is committed to follow rules and regulations related to transporting student-athletes to and from competition and practice sites away from the campus. The University has varsity and junior varsity teams in 24 sports and all athletic contests are conducted under the rules and regulations of the OAC and the NCAA. For intercollegiate competition, it is suggested that teams play approximately one-half of their contests at locations away from the campus at Mount Union. All team travel arrangements for away-from-home contests for Athletics must be approved by the Athletic Director or designate.

Transportation

The sport, number of participants, distance to travel and weather all are determining factors for the method of transportation used by our athletic team. The majority of student-athletes will travel away from campus in a charter bus or 12-passenger vans. All season travel arrangements should be made with the Senior Coordinator within the Department of Physical Plant in the *pre-season*. It is understood that changes will likely occur due to cancellations for weather; therefore, it is the responsibility of the Head Coach to work closely with the Senior Coordinator to cancel and re-schedule transportation accordingly.

Regular Game Day Travel

Specific guidelines for game day travel are outlined Appendix D. Unless otherwise noted, all normal University travel policy requirements stated at the beginning of this document apply.

Each team's head coach is responsible for setting conduct standards (e.g. dress, conduct, curfews, free time activities, etc.) during athletic trips. Student athletes are required to represent the University of Mount Union with appropriate attire, appearance and language, be courteous guests when staying at hotels, and not to leave valuables unattended while traveling or in a hotel room. Absolutely no alcohol is to be carried or consumed while on an Athletic-Department sponsored trip.

Travel itineraries are developed by the head coach and must be in compliance with University rules. Travel itineraries should be followed and any alternative plans or out-of-way locations must be approved by the Athletic Director.

Travel Requirements for Student-Athletes & Private Vehicles

In general, all team members must travel to and from away-from-home contests with the official travel party of the University and stay in assigned lodging, if applicable. Student-athletes are not to transport other student athletes in private vehicles once the students have reported for an official University activity/function. Once the student has reported, official university transportation needs to be supplied by employees and other university-approved drivers or commercial drivers. This directive means it is inappropriate to ask a student-athlete, in his/her own car, to transport others (1) to the airport when departing for an away competition, or (2) to an alternative practice site after reporting to a central location.

Individual Student Athlete Travel

Student athletes traveling individually on any trip involving official University competition are to be accompanied by a coach or staff member. Student athletes wishing to travel separately may travel only with a parent, legal guardian or spouses and all exceptions must be approved by the Athletic Director or designate. If approval is granted, the student-athlete must sign an appropriate [Student Release, Hold Harmless and Indemnification Form](#) to release the University from any liability or risk involved with alternative travel plans.

Special Team Travel

In certain instances, teams may have travel opportunities outside of their regular season and post season matches (Spring Break, preseason tournaments, etc.). In these situations, the guidelines listed under the [Students Traveling with Faculty/Staff](#) section must be followed.

Appendix A: Checklist for Traveling on University-related business

Prior to Trip:

- _____ Determine source of funds for trip from budget office or Dean's office if faculty development and obtain account number to be used on travel forms.
- _____ Complete [Pre-Planning Travel Form](#) and submit to Business Office if total trip expenditures are over \$1,000 or if you would like any trip expenses pre-paid through the Business Office.
- _____ Complete [Cash Advance Form](#) at least two weeks in advance if extra cash will be needed for trip.
- _____ If using purchasing card, make sure available funds on card will cover trip and contact Business Office if card limits need raised.
- _____ While travelling, make sure to obtain receipts for any items over \$25.

Upon return from trip, fill out required forms as needed:

- _____ [Travel and Miscellaneous Expense Reimbursement Form](#) needs filled out if any expenses were paid by the traveler. This form is mostly used for mileage even when the rest of the trip is paid for with the purchasing card.
- _____ **Purchasing Card Reconciliation** needs completed on-line at [Purchasing card website](#). Every transaction that occurred on the trip will need a business purpose indicated as well as the account number. **Be sure to include all original detailed receipts when submitting after-trip forms. Also travel must always be approved by a supervisor.**
- _____ Send completed Expense Reimbursement Form or Purchasing Card Reconciliation forms with receipts attached to supervisor.
- _____ Forward approved forms with receipts to Accounts Payable in the Business Office.

Appendix B: Checklist for Student organization travel

List of documents necessary for the various types of student organization travel:

Document Type	In-town, same-day travel (personal vehicle)	In-town, same-day travel (University vehicle)	Same-day travel (over 8 hours)	Overnight Travel
University Release, Hold Harmless & Indemnification	X	X	X	X
Student Organization Pre-Travel Planning Form				X
Student Organization Travel Agreement			X	X
Emergency Medical Form			X	X
Travel Incident Form (when necessary)	X	X	X	X

Quick Sheet for Student Organization Travel

(adapted, in part, from John Carroll University Student Organization Travel Policy, retrieved from <http://webmedia.jcu.edu/studentactivities/files/2013/01/Travel-Policy2.pdf>)

University-sponsored, in town, same day travel

_____ Submit [Release, Hold Harmless Agreements](#) for all who are traveling to the Office of Student Affairs

University-sponsored, one-day travel

_____ Complete the [Student Organization Travel Form](#), including obtaining your campus advisor's signature of approval

_____ Select a Travel Supervisor

_____ Once completed, submit [Student Organization Travel Form](#) to the Office of Student Involvement & Leadership. Student organizations must complete this form regardless of funding source.

_____ If using a university vehicle, make [reservation online](#) (don't forget to include account number)

_____ If driver is not registered to drive with the University, please complete the online form and submit to the Office of Human Resources for an MVR and approval (don't forget to include account number)

_____ Submit [Release, Hold Harmless Agreements](#) for all who are travelling to the Office of Student Affairs

_____ Submit the [Student Travel Agreement](#) for all who are traveling to the Office of Student Affairs

University-sponsored Overnight Travel

_____ Complete the [Student Organization Travel Form](#), including obtaining your campus advisor's signature of approval

_____ Select a Travel Supervisor

_____ Once completed, submit [Student Organization Travel Form](#) to the Office of Student Involvement & Leadership. Student organizations must complete this form regardless of funding source.

_____ If using a university vehicle, make [reservation online](#) (don't forget to include account number)

_____ If driver is not registered to drive with the University, please complete the online form and submit to the Office of Human Resources for an MVR and approval (don't forget to include account number)

_____ Submit [Release, Hold Harmless Agreements](#) for all who are travelling to the Office of Student Affairs

_____ Submit the [Student Travel Agreement](#) for all who are traveling to the Office of Student Affairs

_____ Submit the [Emergency Medical Form](#) for all who are traveling to the Office of Student Affairs

Don't forget to consider:

_____ Apply for funding using the [Student Organization Travel Form](#) and *Appropriations* Requests from Student Senate (if necessary).

_____ Applicable fees (i. e., who pays for what; and if the organization is paying make sure to get receipts and use a tax-exempt form)

_____ Meals (i. e., who provides food, special dietary needs, etc.)

_____ Transportation (e. g., air, bus, personal vehicle, rental vehicle, university vehicle)

_____ Make sure to take important phone numbers and to take along instructions for accidents or other issues

Appendix C: Checklist for Students traveling with faculty/staff

One Day Travel:

_____ [Academic Travel Request /Authorization Form](#)– required for any trip led by a member of the Academic Affairs organization.

_____ [Pre-Travel Planning Form](#)

_____ **Trip roster**– including important phone numbers

_____ **Travel itinerary**

_____ [Student Release, Hold Harmless and Indemnification Form](#) If the student is under the age of 18, this form must be signed by a parent/guardian.

Overnight Travel:

_____ [Academic Travel Request /Authorization Form](#)– required for any trip led by a member of the Academic Affairs organization.

_____ [Pre-Travel Planning Form](#)

_____ **Trip roster**– including important phone numbers

_____ **Travel itinerary**

_____ [Student Travel Agreement](#)

_____ [Student Emergency Medical Form*](#)

_____ [Student Release, Hold Harmless and Indemnification Form](#) If the student is under the age of 18, this form must be signed by a parent/guardian.

_____ [University of Mount Union Travel Emergency Cards](#)

Appendix D: Checklist for Athletic team travel

1. An approved game schedule will be turned in to athletic director and/or designate to help make transportation arrangements for team.
2. If it is determined the team will travel to an event(s) via van travel then coach will provide departure times and van drivers to athletic director or designate to turn in van schedule to physical plant.
 - a. Van schedule will include date, day, team, budget number, destination, drivers, departure times.
 - b. All drivers must have completed an obtain an approved MVR and successfully complete a defensive driver training annually
 - c. Schedule must include if an overnight is included
 - d. Upon returning vans, coach must complete all paperwork and insure vans are returned to the Physical Plant in accordance with the [Fleet Policy](#).
3. If it is determined the team will use a charter bus for travel then coach will provide athletic director and/or designate departure times, number of travelers to arrange charter bus with preferred provider.
 - a. Prior to trip, coach will provide detailed itinerary to bus company and athletic department that includes stops, lodging arrangements, etc.
 - b. If overnight travel, a separate single room must be reserved for bus driver.
 - c. Any changes need to be communicated as soon as possible with bus company and athletic department.
4. A list of pick-up and drop-off locations will be made at the start of the year and any changes for a particular trip must be communicated in advance.
5. In advance of a trip an itinerary and roster of travel party should be completed, and that roster should include contact numbers for coaches, trainers and/or administrators on the trip.