**OFFICE OF PHYSICAL PLANT TRAVEL FOR TRAINING GUIDELINES**

The following travel guidelines apply to all OPP employees and are in accordance with

Penn State Travel policy.

General Guideline: Travel for training and educational programs is discretionary and has to be approved by the designated supervisor, manager, and director. Reimbursement of expenses incurred in travel for training or education is intended to cover additional expenses an employee incurs, over and above those which would be incurred if travel had not occurred.

Specific Guidelines:

1. Staff employees at OPP may make their own travel arrangements, effective immediately. Requests for travel for training and education programs are made on the OPP Travel Request Form and are forwarded to the supervisor/manager/director for approval. Once approval is granted, forms can be returned to the staff traveler to make their own arrangements. HR will continue, for the time being, to make travel arrangements for staff who request the service and for all technical service employees. Incomplete requests forms forwarded to HR for arrangements will be returned for completion prior to processing. Travel requests should be submitted as far in advance of the travel date or conference as possible. Requests submitted at least four weeks prior to the travel date will be given first priority.

2. Staff employees will not be given cash advances for their travel. A credit card or purchasing card is to be used for reservations and expenses. **A personal credit card or purchasing card number is needed for all hotel reservations.** Cash advances provided to Technical Service employees must be settled within ten (10) days of returning from the trip.

3. The mode of travel will be the most economical use of time and money of the personnel involved and the requirements of the trip. Consideration will be made as to the number of employees traveling, distance, etc.

4. To be reimbursed for air travel, the ticket passenger receipt from the airline must be attached to the Travel Expense Account Form when submitted for reimbursement. Travel agency invoices or credit card receipts are not acceptable. Bag check fees up to $25.00 each way will be reimbursed. The University will not pay for more than one checked bag.

5. Fleet vehicles may be driven only by University employees at least 21 years of age who hold a valid appropriate class operator's license. Vehicles are not to be used

for non-University business. Fines incurred must be paid by the individual and will not be reimbursed by the University. Vehicles must be picked up the day they are

to be used and may not be taken to an individual's home. OPP does not purchase the zero deductible coverage when renting a fleet vehicle; therefore, employees should not check the "zero deductible" box on the fleet checkout form.

6. Use of privately-owned vehicles for University travel is discouraged, but may be done with the prior approval of the AVP or a designee by submitting a Request to Use Private Vehicle to the AVP. If permission is granted to use a personal vehicle, mileage for travel will be paid for mileage in excess of that normally driven from home to work. The financial loss for damage to a privately owned vehicle used on business is not reimbursable by the University.

7. Extra expenses incurred because of a traveler's own convenience or by taking along a guest will not be reimbursed by the University. For example, if several employees are traveling in a Fleet vehicle but another person wishes to drive his or her own vehicle, or travel by air, that travel expense will not be reimbursed. Extra mileage and expenses for indirect routes will not be reimbursed; reimbursement for expenses will be based on such charges as would have been incurred by traveling the most direct route.

8. Parking and toll charges are allowable travel expenses. Receipts are required for reimbursement of parking expenses. Whenever possible, receipted bills or stamped tickets for tolls showing the exact payment should be submitted.

9. Rental automobiles may be requested when the overall cost of the rental is less than the cost of other reasonably convenient means of transportation, such as taxicabs or airport limousines, or when there is no other means of transportation. Other circumstances where rental cars may be allowable: 1. Extended stays (over 4 days) in non-metropolitan areas for use to get evening meals. 2. Circumstances where a rental car is the most cost effective means of transportation to and from

the training. Any employee on travel status renting a vehicle from National using the Big 10 rate must DECLINE the option for any additional collision insurance. Rentals from other agencies must ACCEPT the option to eliminate the collision deductible.

10. Lodging expenses shall not exceed the normal maximum rate for a single room.

The receipted bill specifying dates and rates must be attached to the Travel

Expense Report when submitted. Credit card receipts are not acceptable.

11. Tips, except for meals, will not be reimbursed (i.e. valet parking, bell hops, room service, taxi).

12. Meal expenses and tips related to meals:

* will be reimbursed via the meal and incidentals per diem. The cost for meals consumed is reimbursed based on rates shown on the Travel OnLion web page ([http://www.travel.psu.edu](http://www.travel.psu.edu/)) which establishes the maximum amount that will be reimbursed.
* Employees will claim per diem for individual meals. Employees may, at their own discretion, submit actual expenses for meals if less than per diem. In no case will receipts for individual meals be required.
* However, itemized receipts are required from the employee hosting a business group meal.
* The University will not reimburse the costs for alcoholic beverages.
* If meals are provided by a conference or host, then the meal per diem for that trip will be adjusted to correspond with the meals that were provided. In the event that all meals for a day are provided by a conference or some other source, no meal per diem can be claimed for that day.

13. When requesting reimbursement for group meeting meals, the nature of the function, names of the persons in attendance, and appropriate receipts must be submitted. The costs incurred for such meals must be prudent, reasonable and in

the best interest of the University. A Group Meal Support Form must be filled out. See FN-10, <http://guru.psu.edu/policies/fn10.html>.

14. Optional recreational activities (ex. dinner cruises, tours of local sites, etc.) will not be paid for by the University, unless included in the regular registration fee.

15. There will be a maximum of $5/day of miscellaneous expenses reimbursed. These expenses can include things like the cost of a phone call home, etc.

16. Travel expense reimbursements will not be processed until all signed receipts are submitted. Reimbursement submitted within 2 weeks of returning from travel will be given first priority.

Directors can make exceptions to these guidelines, for unusual circumstances. Issued: 7/1/90

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