

School of Education and Social Policy
Travel Tip Sheet
September 2013

This document highlights best practices regarding travel for business purposes. This is not an inclusive list and does not supersede University policy. For complete travel policies, see the University's Travel Policy and Procedures <http://www.northwestern.edu/financial-operations/policies-procedures/policies/travel.pdf>

30-Day Rule

All travel expenses should be submitted to your department administrator within 20 days of their occurrence in order to comply with the 30-day rule for SESP approval.

Proof of Conference Travel

Travelers must provide a conference flyer or informational pamphlet from the conference, which should include the name of the conference, date and location.

Conference Registration Fee

Travelers may directly bill registration fees to chart strings. Provide the registration form to your department administrator at least 2 months prior to travel. Inform the administrator to which account the fee should be charged.

Airfare

Travelers are strongly encouraged to use University preferred vendors for booking airfare. Directly charging your ticket to your chart string means not waiting until after travel for reimbursement. The University has three preferred travel agencies http://www.northwestern.edu/uservices/travel/make_reservation/approved/. Compass is the preferred online vendor http://www.northwestern.edu/uservices/travel/make_reservation/compass/.

Setting aside myths:

- Compass is much like the other online booking interfaces (i.e. Expedia, Travelocity)
- You can shop around for your preferred schedule and book the ticket yourself
- You can fly your favorite airline, use your frequent flyer number and get your miles
- Business class upgrades are only reimbursable for flights over 12 hours from gate to gate and require preapproval

If you choose to extend your travel adjacent to a trip for work:

Along with your actual flight receipt(s), submit a printed copy of the flight prices for the day before and the day after the work event(s). The purpose of this is to prove that you are not charging university funds for recreational travel.

Lodging

Travelers will be reimbursed for the reasonable and actual cost of lodging up to the average loading rates as determined by [Business Travel News Corporate Travel Index](#).

Meals

The itemized bill and proof of payment (i.e., credit card receipt) must be submitted. Breakfast and lunch meals should be reasonably priced. Dinners are reimbursable up to \$65 per person (including tax and tip). If traveler pays for colleagues from another institution, a list of guests must be submitted. If you are splitting a receipt, you should ask for an extra copy of an itemized receipt and mark the meal for which you paid.

Car Rental

University discounts are available http://www.northwestern.edu/uservices/travel/car_rental/. Travelers will not be reimbursed for insurance purchased from domestic or Canadian rental agencies. For international rental, coverage must be purchased and travelers will be reimbursed. Mileage is not reimbursable for car rental. Fuel expenses are reimbursable. Note: You must fill up the gas tank of the rental car and not pay the extortionist rate of the rental company to refill it.

Private Automobile Transportation

If traveler elects to drive vehicle and is seeking mileage in lieu of airfare, reimbursement is limited to the lesser cost of the two. The rate of reimbursement (see University policy for current rate) covers all fuel, maintenance, insurance, transportation and operating costs. Tolls and reasonable parking charges are reimbursable.

Currency Conversion

For international travel, original itemized receipts should be accompanied by documentation of the exchange rate. The currency converter is available at www.oanda.com/currency/converter/. Submit a printout of the currency conversion for each travel expense. Alternatively, the traveler may submit a credit card statement listing all reimbursable travel expenses.

Travel Expenditures Not Reimbursable by the University

See list on pages 26-27 in the University's Travel Policy and Procedures (last revised 3/27/13).