

Mercer University School of Medicine Travel Reimbursement Policy

Overview

The Mercer University Travel Reimbursement Policy must be adhered to unless restricted further by the following MUSM Travel Reimbursement Policy. MUSM will only reimburse travelers for necessary and reasonable expenses incurred for properly pre-authorized MUSM business travel. Travel reimbursement is limited to the individual traveling for MUSM business and not for those accompanying that individual. Based on the requirements of IRS ruling (Revenue Ruling 2006-56), Accounts Payable must ensure that Mercer University School of Medicine's employee accountable plan requires the following:

- There must be a business connection and the expense must be reasonable.
- There must be an adequate accounting for the expense within two weeks of the completion of the travel. If a complete and accurate Expense Report is not turned in to MUSM Finance Office within this timeframe, the expense is subject to not being reimbursed.
- All excess reimbursements must be repaid within two weeks of the completion of the travel.

Traveler Responsibility

Individuals traveling on behalf of MUSM should:

Obtain pre-authorization for travel at least two weeks prior to initial travel date by filling out the electronic MUSM Travel Authorization Form, that may be accessed here: [Travel Authorization Request](#). Travel Authorization Requests should include approval from your direct supervisor, and/or Chair of your department. It will then be forwarded to the MUSM Finance Office for final approval. Do not make any travel arrangements until final approval is obtained and the approved form has been returned to you via email.

- Exercise good judgment when incurring travel expenses.
- Travel Expense Reports will be submitted through Workday (Create Expense Report)
- Travelers are responsible for ensuring that incurred expenses comply with all applicable policies and authorizations and are supported with valid detailed receipts and other documentation as required.

Documentation

The traveler is responsible for maintaining complete and accurate records and submitting receipts and/or other documentation for expenses incurred as listed below.

- *Original detailed receipts.*
- *No sales tax has been paid (if applicable). MUSM is exempt from sales tax purchases in the State of Georgia, Florida, Tennessee, and Ohio.*
- *The account charged has available funding/budget (This can vary based on expected funding for donor accounts.).*
- *The purchase was an allowable expense by University policies.*
- *The Expense Report has proper documentation for mileage and other reimbursement in accordance with IRS guidelines for accountable plans.*

In the case where an original receipt is lost or destroyed, the employee must make an effort to obtain a duplicate receipt. If the employee is unable to obtain a duplicate receipt, the employee must submit the completed Lost or Stolen Receipt Affidavit Form and attach it to your Expense Report in Workday.

Transportation

Travelers should use the most economical mode of available transportation during MUSM approved trips. MUSM will reimburse the traveler at the IRS approved mileage rate for use of a personal automobile. The University has a preferred pricing agreement with Enterprise Rental. To take advantage of preferred pricing and maximize the cost savings, travelers are encouraged to make rental car arrangements with the preferred pricing vendor, Enterprise. The traveler should make airfare arrangements at least three weeks prior to travel to obtain the lowest fare possible.

Air travel will be reimbursed using the most economical airfare available. Any exceptions to the most economical airfare (medical reasons) should be documented and approved. The traveler is responsible for any expense incurred as a result of lost tickets or change in itinerary due to personal reasons. Expenses incurred due to lost tickets or change in itinerary for business reasons must be documented.

Lodging

MUSM will reimburse the traveler for the actual costs of the accommodations within a reasonable level. All lodging receipts must be itemized. There may be separate or additional travel requirements for some grants or contracts.

Meals

MUSM does not pay per diem meal expenses. MUSM will reimburse the traveler for actual cost of meals within reasonable limits. Tips in excess of 20% will not be reimbursed. Alcoholic beverages are not an allowable expenditure. There may be separate or additional requirements for meals by some grants or contracts.

Other Travel Expenses

Other reimbursable incurred expenses are registration fees, internet access, parking fees, and expenses for baggage handling. Please retain any detailed documentation to support these expenses. Non-reimbursable expenses include parking tickets, lost or stolen property, and expenses not related to the approved travel assignment (movies, gym fees, etc.). Any tips outside of meals must be within reasonable limits.

Travel Advances

Travel Advances will be requested through Workday via the "Create Spend Authorization" form. Travel Advances should be requested no more than 30 days prior to the trip and must be reconciled within two weeks of the end of travel. There can only be one outstanding travel advance per employee.