



Travel & Expense Program Manual
Procurement, Contracting & Payment Services
WVU, WVU Research Corp, & WVU
Innovation Corp

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SECTION I: PURPOSE & SCOPE

This Manual contains the procedures applicable to the travel program for West Virginia University (“WVU”) West Virginia University Research Corporation (“WVURC”), and WVU Innovation Corporation (“WVUIC”), hereinafter referred to as the “University Travel Program.” WVU, WVURC, and WVUIC will hereinafter be referred to as the “University” throughout this document.

The University Travel Program applies to the following:

- The management of in-state, out-of-state, and international travel (hereinafter referred to as “travel”) of employees, non-employees traveling on behalf of the University, and members of the following boards: West Virginia University Board of Governors, WVURC Board of Directors, and WVU Innovation Corporation Board of Directors (together, the “Boards”) when using University funds.
- Faculty and staff while on sabbatical, so long as the expenses are approved through normal channels. It does not apply to employees who are on a leave of absence, as those expenses are not considered University business and cannot be paid using University funds.
- The University Travel Program may apply to consultants and contractors at the University’s option. All consultant or contractor travel should be included as part of the consulting/contractor fee agreement.

Because international travel exposes University data and information technology resources to new environments and potentially greater risks, additional precautions are required to ensure their protection when traveling abroad. Anyone traveling outside of the United States must review and familiarize themselves with the requirements within the International Travel Technology Security Standard prior to leaving the country. The International Travel Security Standard can be found here: <https://it.wvu.edu/policies-and-procedures/acceptable-use/international-travel-security-standard>.

All payments and reimbursements of travel expenses paid from federal, state, and private grants shall be governed by the terms and conditions of the grant if they differ from those of the University Travel Program; otherwise, reimbursement is governed by this policy.

Any exceptions to this policy must be approved by Procurement, Contracting & Payment Services (PCPS) Travel Team through the process outlined in Section XIV.

SECTION II: RESPONSIBILITIES AND SEGREGATION OF DUTIES

Employee:

Employees are responsible for the timely and accurate submission of expense reports in the University's expense management system, **MyExpenses**. By submitting/approving an expense report, the employee is certifying that all expenses included in the report were for legitimate business purposes, are accurate, and have not been previously reimbursed or paid from any other source.

If a delegate submits a report on the employee's behalf, it is ultimately the traveler's/expense owner's responsibility to ensure the accuracy and legitimacy of all charges, certifying such through the approval process.

Approvers:

Approvers are those responsible for the authorization and approval of expenses of employees. The approval workflow in **MyExpenses** includes the following roles:

- Supervisors and/or Task Managers are responsible for reviewing each expense report to ensure the expenses are allowable, allocable, and reasonable to the funding account/award.
- Financial Transaction Approvers are responsible for ensuring the following:
 - All relevant policies and procedures have been followed, and the expenses comply with the University Travel Program and all other applicable policies and procedures.
 - A correct accounting string was used.
 - Funds are available in the account being charged.
 - The information on the expense report matches the documentation (i.e., transaction dates, destination, travel dates, etc.) and the appropriate supporting documentation is attached.
- PCPS is responsible for ensuring the expenses comply with the University Travel Program and all other applicable policies and procedures.
- Additional approval groups as applicable to the expense report (i.e., special approvals for athletic recruiting, Education Abroad expenses, etc.).

Delegating approval:

Approval can be delegated in MyExpenses; however, the following guidelines must be followed:

- Delegation of approval authority must be designated in the approver's profile in MyExpenses. Delegation of approval authority is not granted by giving out one's login ID and password.
- Approvers are accountable even if they delegate their approval authority to someone else.

- If an approver designates another employee as his/her approval delegate, the approver delegating the authority is still responsible for any expense approved by his/her delegate. That approval delegate must be knowledgeable about the applicable policies, procedures, and sponsor requirements. Approval should not be delegated to a student worker or graduate assistant.

Segregation of duties:

The Financial Management Director in the Shared Services Center is responsible for oversight of the Financial Transaction Approvers and ensuring segregation of duties occurs within **MyExpenses**. If a College/Division is not included within the scope of the Shared Services Center, the responsibilities listed below will be assigned to the Strategic Business Advisor. This includes, but is not limited to, the following:

- Employees who serve in the Financial Transaction Approver role must not approve their own expense reports.
- Approvers who approve at the Supervisor/Task Manager must not approve the same expense reports at Financial Transaction Approver role.
- Employees who serve in the Financial Transaction Approvers role shall not approve their direct supervisor's expense reports.

SECTION III: TRAVEL AUTHORIZATION

Travel may be authorized only for official University business and when sufficient and appropriate financial resources exist to pay for travel expenses.

Although no form or other written notice is required, travel must be approved by the traveler's supervisor beforehand. If the travel is grant funded, the traveler must follow any grant regulations regarding travel authorization requirements.

Employees must also ensure that grant-funded travel complies with any grantor terms or conditions which require an event policy or code-of-conduct promoting a safe and harassment-free environment. More information can be found at the WVU Responsible Conduct of Research Office at <https://rcr.wvu.edu/>.

All international travel must be approved in advance through the process designated by the Office of Global Affairs and the Office of Export Control. Please visit the Office of Global Affairs' website for further information: <https://international.wvu.edu/travel/registration>

SECTION IV: BUSINESS AND PERSONAL TRAVEL EXPENSES

Business purpose of the event:

Travelers are required to document the business purpose for their travel on their expense report in **MyExpenses**. If the traveler has multiple business activities over a single travel event, all activities must be specified when documenting travel expenses. For example, if a traveler attends a conference, but then also attends a separate business meeting before or after a scheduled conference, the expense report(s) in **MyExpenses** should document the purposes for both events.

The University defines business travel as activities that fall under these date parameters:

- One day prior to the start of University business.
- All days University business is being conducted.
- One day following the conclusion of University business. *Note: when the business event ends early in the day, the traveler should use sound judgment when determining his/her return travel schedule.

Any additional days will require further business justification or will be considered personal.

Personal expenses:

The University will not reimburse any personal expenses incurred and personal expenses cannot be paid using a PCard. Careful records must be maintained to separate personal expenses incurred from the allowable business expenses of a trip. If a trip is extended or modified for personal travel, then PCPS reserves the right to request additional documentation to demonstrate that extending or modifying the trip did not result in a higher cost to the University. If such documentation cannot be provided, reimbursement may be delayed and/or denied. Note: documentation should be gathered at the time of booking, not after the trip has occurred, to ensure the cost comparison is accurate.

Personal expenses include, but are not limited to the following:

- Any additional costs incurred due to extending the duration of the trip for personal travel, stopovers, route modifications, or means of transportation made for the convenience of the traveler.
- Expenses incurred by a spouse/partner and/or guest traveling in a personal capacity.
- Upgrades or other travel expenses deemed unallowable throughout this document.

Please note: expenses that appear personal, unallowable, unusual, or excessive could be subject to additional scrutiny or determined unallowable under audit. Further justification may be required for these expenses.

SECTION V: AIR TRAVEL

Employees are expected to take the lowest logical available fare unless granted an exception through the process outlined in Section XIV of this document.

General guidelines to be followed for air travel:

- Travelers are permitted to book travel through their preferred booking method.
- Travelers are encouraged to book with the specific airlines that offer the University contracted discounts when possible/practical. Click [here](#) for booking code information.
- It is recommended for travelers to book at least 14 days in advance of the departure date for domestic air travel and 21 days for international air travel to receive the lowest logical airfare possible.
- Personal rewards programs may be used to upgrade class of service; however, the University will not reimburse for upgrades.
- Change fees due to the traveler's negligence are unallowable. Change fees caused by inclement weather, university business needs, natural disaster/pandemic, or personal emergency may be paid for by the University at the discretion of the University.
- One (1) checked bag per traveler can be paid with University funds. Additional checked bags are to be paid with personal funds unless multiple checked bags are needed for business reasons (i.e., extended international trips, transporting University equipment, etc.).
- Travelers may use University funds to pay for Wi-Fi during flight(s) if the traveler's supervisor deems the expense necessary/allowable.
- For information on miscellaneous allowable expenses related to international travel, please see Section XI of this document.

Fly America Act

- All international travel funded by the federal government must meet the Fly America Act Guidelines. The Fly America Act Guidelines dictate that all federally funded travel must be via a U.S. flag air carrier.
- If travelers are using federal funds, U.S. flag carriers must be used, even when foreign carriers are cheaper or provide preferred routing, are more convenient, or are part of frequent flyer agreements.
- The Open Skies Agreement is an exception to the Fly America Act. The U.S. Government has entered into several agreements that allow federal funded transportation services for travel to use foreign air carriers under certain circumstances.

Types of airfare classes/tickets:

- Travelers are permitted to book business class for any flights that are six (6) continuous hours or longer. All other flights must be booked in coach/economy class unless granted an exception through the process outlines in Section XIV of this document.
- Travelers are strongly discouraged from purchasing a Basic Economy ticket, as those tickets typically result in restrictions/additional costs for baggage, seat selection, etc.

and the traveler will lose the full cost of the ticket if/when the trip needs canceled or changed.

- Non-refundable tickets are encouraged for most flights. When determining if a refundable ticket is needed, travelers should compare the cost difference between the non-refundable and refundable tickets vs how much the penalty would be to cancel or change a non-refundable ticket. If cost difference between the non-refundable and refundable ticket is the same or less than the penalty, then the fully refundable ticket should be considered. Travelers should verify if there is a change penalty or refund penalty on the refundable ticket.

Other air travel related expenses:

The travel industry offers a variety of “perks” related to air travel. The following expenses are permitted if considered a necessary or allowable business expense by the traveler’s supervisor. These expenses should be limited to travelers who travel frequently.

- TSA Pre-Check
- Global Entry

The following expenses are considered personal and **cannot** be paid using University funds unless there is a legitimate business circumstance that requires the purchase through the exception process outlined in Section XIV of this document:

- Various airline or airport clubs
- Early bird check-in
- Upgraded seat selection
- Food and beverage costs on the airplane
- Miscellaneous airline programs and rewards that result in a cost to the University but serve no business purpose.

Chartered aircraft services

All aircraft charter services must be in compliance with and approved pursuant to WVU Policy G-2 “Use of Air Charter Services.”

Additionally, charter flights, other than those booked through the University’s contracted aircraft charter vendors, present potential liability issues to the University. Except for air charter services booked by the University’s Department of Intercollegiate Athletics and its employees, University travelers are not permitted to utilize any privately-owned aircraft, other than the University’s contracted aircraft charter services, for business travel unless additional approval is obtained in advance from the PCPS Travel Department and WVU’s Risk Management Office. If deemed allowable, the traveler is responsible for any and all liability associated with the use of such arrangements. Reimbursement will be based on the cost of the lowest alternative method of transportation to that specific location.

SECTION VI: GROUND TRANSPORTATION

When operating a vehicle while on University business, the operator of the vehicle must possess a valid operator's license. The operator is personally responsible for any fines and/or penalties resulting from citations, charges, or warrants. This includes, but is not limited to, parking tickets, traffic violations, towing costs, and fines.

Choosing your means of ground transportation:

Travelers are to use the most economical and practical means of ground transportation. When determining the means of ground transportation, travelers should consider the following:

- One-way car rental through the University's contracted rental car provider(s) (Enterprise/National Car Rental) from Morgantown to the Pittsburgh airport is the preferred method of transportation to the Pittsburgh Airport. Drop off/one-way rental fees are waived when booking with the University's preferred provider(s) (Enterprise/National Car Rental).
- In the event a traveler chooses to drive rather than fly, reimbursement will be based on actual in-transit expenses not to exceed the lowest available commercial airfare plus local transportation and related expenses to and from the airport.
- When one or more travelers are traveling together, they should consolidate the use of ground transportation whenever possible/practical.
- Travelers should exercise sound judgment when using multiple forms of ground transportation in one trip. The use of redundant methods (i.e., taxi service when the traveler has rented a vehicle) should not be used for the convenience of the traveler and the business purpose for those expenses must be documented.

Rental vehicles:

When arranging vehicle rental reservations, the following guidelines apply:

- Reservations are to be made with the University's preferred provider(s) (Enterprise/National Car Rental) unless there is a lack of availability. Click [here](#) for information on the specific booking code to use. Make sure to book using the appropriate code to ensure contractual discounts and insurance coverage apply.
- Use of a vehicle of a class above full-sized (i.e., SUV, truck, luxury, etc.) is not permitted unless the traveler is granted an exception through the process outlined in Section XIV of this document.
- Additional charges for GPS are permitted if the traveler's supervisor deems the expense necessary/allowable.
- For information on insurance related to rental cars, please see Section X of this document.
- The rental vehicle should be returned with a full tank of gas. Prepaying for fuel with the rental vehicle company should be limited to the situations listed below. Travelers should inform the provider when checking out the vehicle, as waiting until the vehicle is returned may result in a significantly higher cost.
 - One-way rentals to/from the Pittsburgh airport.
 - Rentals for outside guests.

- Those that are renting using a department billing account.
- Under situations where schedule or safety concerns dictate (i.e., dropping the vehicle off late at night and refueling may be a safety concern).
- Additional charges for entertainment packages, satellite radio, Wi-Fi, etc. are not permitted unless granted an exception by the process outlined in Section XIV of this document.

Privately owned vehicles:

Use of personal vehicles for business travel is permitted under the following guidelines:

- Use of personal vehicles will be reimbursed at the current IRS allowable rate. These rates are subject to change based on IRS regulations and are adjusted accordingly.
- The reimbursement is based on the number of miles traveled.
- Mileage allowances cover all operating costs, including repairs, insurance, fuel, depreciation, towing, and other auto-related expenses. Fuel for personal vehicles must not be paid via PCard or reimbursed, as the cost of fuel is included in the mileage reimbursement calculation.
- Mileage incurred during travel within the county of the employee's official work location will not be reimbursed unless granted an exception by PCPS through the process outlined in Section XIV of this document. This includes driving from one University building to another University building within the same county to attend business meetings.

How to calculate the to and from:

- Mileage should only include the miles traveled to the destination on the first day of travel and from the destination on the last day of travel unless business circumstances require the employee to travel back and forth during the trip. Additional mileage will not be reimbursed.
 - For example, if a traveler has someone else drive them to the airport and pick them up upon their return, the University will only reimburse for the initial trip for departure and the return trip. The University will not reimburse for that person's round-trip drive on both the departure and return date.
- Mileage claimed by the employee shall not include the distance traveled during the employee's standard daily commute; however, if the employee is traveling directly from their residence and the distance is closer than their work location, reimbursement should be calculated on that distance.
- The following scenarios are examples of how mileage must be calculated. **In these examples, an employee lives in Washington, PA, but her official work location is in Morgantown, WV:**

Scenario	Proper Calculation
The employee goes to a conference in Clarksburg, WV on a normal working day.	How: from Morgantown to Clarksburg and back. Why: because the work location is closer to the travel destination.
The employee goes to a conference in Clarksburg, WV on a Saturday (not her normal working day).	How: from the employee's home address to Clarksburg and back. Why: because the employee would not be making her commute that day if she were not in travel status.
The employee drives her personal vehicle to the Pittsburgh Airport for business air travel.	How: from the employee's home address to the Pittsburgh Airport and back. Why: because the employee's home address is closer to the travel destination.
The employee goes to a conference in Clarksburg, WV on a normal working day, but does not return until the following Saturday.	How: from Morgantown to Clarksburg and then from Clarksburg to the employee's home address. Why: because the employee would be making the normal commute to Morgantown on the day she left but would not be expected to make the normal commute from Morgantown on the day she returns.

Allowable mileage reimbursements and other travel costs for remote employees traveling to University locations:

	Travel Within the County Where the Employee's College, Department or Unit Resides	Travel Outside the County Where the Employee's College, Department or Unit Resides
On-site/Hybrid Employees and Remote Employees Who Reside within 100 miles of his/her College/Department's campus location	Mileage, parking, lodging, or other travel expenses are neither reimbursable nor payable from University or external funds.	Travel expenses are reimbursable and payable from University or external funds if approved by the employee's dean/vice president and the expenses comply with WVU's travel manual.
Remote Employees Who reside more than 100 miles from his/her	Travel expenses are reimbursable and payable from University or external funds if approved	Travel expenses are reimbursable and payable from University or external funds if approved by the employee's

College/Department's campus location	by the employee's dean/vice president and the expenses comply with WVU's travel manual. This should be very infrequent and should not include routine visits to the office.	dean/vice president and the expenses comply with WVU's travel manual.
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Note: Reimbursement of employee travel from their residence to their primary campus work location is considered a personal expense by the IRS and therefore the reimbursement of such travel will always be considered additional taxable income to the employee.

Approved reimbursement of employee travel for business purposes to travel locations outside of the county where the employee's primary campus work location is generally considered a business expense by the IRS and therefore a non-taxable reimbursement to the employee.

See the University's [travel website](#) for examples of how to calculate mileage. For additional information regarding taxability, contact Tax Services at tax@mail.wvu.edu.

Black car service/limo service:

When booking black car/limo service, the following guidelines apply:

- The use of black car service/limo service should be limited to rare situations where a rental car or mileage reimbursement do not make sense from a business and/or practical perspective (i.e. visitors coming into the Pittsburgh airport who do not drive; a University leader needs to conduct business during the drive, etc.) and must be approved by applicable the Dean/VP.
- Travelers are to avoid "wait charges" when using car services. If the traveler is aware of a delay that will affect his/her scheduled pick-up time, he/she should contact the car service provider directly.

Courtesy vehicles:

Courtesy vehicles may be used when permanently assigned to one employee or department. Reimbursement will be made using the approved Courtesy Rate.

University owned vehicles:

University-owned vehicles can be used for business travel if permitted by the University's fleet management policies and procedures.

Miscellaneous ground transportation & expenses

When booking miscellaneous ground transportation, the following guidelines apply:

- Rail, bus, taxi, Uber/Lyft, shuttle service, and other ground transportation may be used. Travelers are expected to use the lowest logical fare. Travelers should use caution when

using services such as Uber/Lyft and research/evaluate ground transportation choices prior to arriving at the destination, as there is no guarantee of safety when using such services.

- Reasonable tips for bus, taxi, and other drivers are permitted. There is no set guideline on what dollar amount to tip, but industry standard for domestic ground transportation is 10 to 20%. Travelers should follow local custom when tipping during international travel if available.
- The cost of parking while in travel status is permitted on University funds.

SECTION VII: LODGING

Travelers are expected to use sound financial judgement when selecting lodging accommodations. When making hotel reservations:

- Allowable lodging expenses include room rates, use of meeting rooms, Wi-Fi, and all applicable taxes and surcharges.
- **“No Show”** fees and hotel room cancellations are the responsibility of the traveler unless due to a personal emergency, inclement weather, natural disaster/pandemic, or specific business need at the University’s discretion.
- The following expenses/fees are not permitted with University funds:
 - Room service/entertainment expenses (the cost of meals is included in the meal per diem). If booking a hotel for an outside guest, please make sure the guest has been told that meals, room service, etc. must be paid for personally and not charged to the room.
 - Health club facility fees.
 - Additional charges for multiple occupancy unless all occupants are traveling on behalf of University business.
 - Any fees due to damage to the hotel room or additional cleaning fees.

Airbnb and other similar companies:

Use of a hotel/motel is the preferred accommodation type for all University travel, excluding group travel booked through Global Affairs. If the traveler elects to book accommodations through Home Sharing, Airbnb, VRBO, and other alternative (non-hotel) lodging services, the following guidelines must be followed:

- The University must not be the contracting party for any agreements with such services; instead, the agreement must be between the service provider and the traveler since it is the traveler choosing this method of accommodation.
- The traveler is responsible for any and all liability associated with the use of such accommodations.
- A detailed receipt is required, and the University will only pay for the nightly booking rate, applicable taxes and surcharges, and standard/reasonable cleaning/service fees.

Non-cost stays (i.e., staying with friends and family):

If a traveler elects to stay with a friend or family member rather than an official accommodation, no reimbursements are permitted for these types of stays.

SECTION VIII: MEAL AND INCIDENTAL EXPENSE REIMBURSEMENT

Meals and incidental expenses (“M&IE”) while on business travel will be reimbursed to the traveler:

- The reimbursement rate is based on the travel destination and is not to exceed the rate established by the General Services Administration (“GSA”).
- All meal expenses must be reimbursed based on the Meal Calculator Guidelines provided by the GSA. MyExpenses performs this calculation for the traveler.
- This guideline applies to domestic and international travel.
- The GSA establishes a lower daily rate for the first and last day of travel, referred to as “the travel day.” The travel day rate is calculated and applied in MyExpenses by selecting the Travel Day under the list of meals for those applicable dates. The travel date rate must be applied on the first and last day of travel with the following exception:
 - If the traveler begins their return trip on one day but does not return to his/her home until after midnight the following day, the traveler may receive the full per diem amount for that return day.
 - For example: if a traveler begins his trip home on Tuesday, but his flight does not land until late in the day and he does not arrive at his home until 12:30 am on Wednesday, he can claim the full per diem rate for Tuesday rather than the travel day rate.

When meals are provided to a traveler (i.e., included in registration fee), the per diem rate must be reduced by the amount allotted for that particular meal by the GSA unless the traveler is granted an exception through the process outlined in Section XIV. Travelers must reduce the amount allotted for meals that were provided to them during their trip by applying the deduction for that meal in **MyExpenses**.

Incidental expenses:

The daily GSA rate includes not only the cost of the meal, but also a flat dollar amount allotted for “Incidental Expenses.” Because these incidental expenses are already factored into the per diem rate, travelers will not be reimbursed/cannot pay on the PCard for these expenses beyond the dollar amount allotted in the per diem. These incidental expenses include:

- Fees and tips for baggage carriers, valets, housekeepers, etc.
- Transportation between places of lodging or business and places where meals are taking place.

For example, the GSA allows \$5 per day for incidentals. This would then be the only amount the University will pay for fees and tips to maids/valets and the University will not pay for the

cost of a taxi/Uber to drive to a restaurant unless there is no other reasonable option within walking distance, or a business reason dictates the need to pay to travel to a meal.

Unallowable M&IE expenses include:

The following expenses are considered unallowable and cannot be paid using University funds:

- Meals and incidentals when the travel occurs entirely in one calendar day.
- Individual meal expenses on PCard.
- Alcoholic beverages and entertainment expenses (unless to be paid by WVURC funds and only if approved in advance and in writing by the University's Chief Procurement Officer).
- Incidental expenses beyond the daily allotted amount.

Hospitality while on travel:

Any hospitality expenses incurred while on travel must comply with the WVU/WVURC Hospitality Policy. All required documentation must be included with the travel expense report, and applicable meals must be deducted from the per diem request.

Guardian/student team travel & meals:

Guardian/Student team travel is defined as: travelers transporting or accompanying clients, patients, students, or others entrusted in their care, education, or placement.

- Original itemized receipts are required; or in lieu of receipts for students, a student signature form may be provided.
- The "Guardian" or "Responsible Party" is required to exercise sound judgment in determining "reasonable expenses" to incur for the situation.
- Guardian travel expenses shall be paid via PCard, including meals.
- Any meals provided must be deducted from meal per diem requests.
- Alcoholic beverages are unallowable.

In the case of athletic team travel, training table meals are authorized for payment with the PCard. Receipts are required, or in lieu of receipts for students, a student signature form may be provided.

**SECTION IX: REGISTRATION FEES & EXPENSES PROVIDED AT A
CONFERENCE/EVENT**

Payments can be made for registration fees or charges to attend conferences, meetings, seminars, and/or workshops for official University business.

Allowable expenses include:

- Registration fees for a conference, meeting, seminar, etc.

- Lodging and/or meals that may be included in the registration fee.
- Advance payment for registration fees (only when paid via PCard)
 - Cancellation fees are allowable if the traveler is required to change travel plans for business reasons, inclement weather, natural disaster/pandemic or personal emergencies at the University's discretion.

Unallowable expenses include:

- Cancellations fees due to the failure of the traveler or the traveler's representative to notify the event sponsor in a timely manner.
- Additional allowance or reimbursement for lodging or meals that are included in registration fees.

Any prizes, awards, or gifts provided at a conference (i.e., door prizes, supplier booth giveaways) must comply with the WV Ethics Commission's guidelines on gift acceptance, which can be found here: <https://ethics.wv.gov/Pages/forms.aspx>

SECTION X: INSURANCE

Insurance related to air travel:

- Flight insurance to cover for cancellations or last-minute changes to flight arrangements is allowable if approved at the departmental level and if paid with non-grant funds. If the trip is grant funded, trip insurance must be deemed allowable by the grant.
- Baggage insurance can only be paid with University funds if University property (i.e., laptop or equipment) is being stored in the checked bag(s) and the cost to replace the University property exceeds the cost of the insurance.

Insurance related to rental vehicles:

- Insurance coverage is included in the University's contract with the preferred provider(s) (Enterprise/National Car Rental) while traveling in the United States. Travelers **should not** pay for additional insurance. Note: insurance coverage does not apply when a personal guest of the traveler is driving the vehicle or for any personal days of the trip.
- When renting from providers other than the University's preferred provider(s) (Enterprise/National Car Rental), travelers should accept all insurance coverage when renting vehicles in all foreign countries.

Insurance for privately owned vehicles:

Liability

- The employee's personal auto liability insurance is primary in the event of a motor vehicle accident which causes bodily injury to a third party, or property damage to a third party's property. Employees involved in a motor vehicle accident of this type should first contact their personal auto insurance agent to report the accident.
- Should an employee have a motor vehicle accident serious enough to exhaust their personal auto liability insurance limits, WVU's commercial auto insurance policy would respond as excess coverage to the employee's policy.

Auto Physical Damage

- Damage to an employee's personal vehicle while used for University business travel must be submitted to the employee's personal auto insurance agent or company. **At no time does WVU's commercial auto insurance policy pay for damage to an employee's vehicle.** Employees who wish to avoid this possibility should use a University owned vehicle, or an Enterprise rental vehicle, to meet their travel needs.

Health insurance while traveling:

- Health insurance while traveling internationally- WVU has partnered with International SOS to provide a comprehensive emergency assistance and health insurance package for all WVU international travelers. Details about this program can be found on the Office of Global Affairs' website at this location:
<https://international.wvu.edu/travel/traveler-information>
- Employee travelers with domestic health insurance needs must address them through their personal health insurance provider, unless an injury or illness is job related. In that case, the traveler would need to complete an employee accident/injury report to be forwarded to WVU Medical Management and the Department of Environmental Health & Safety. Please contact WVU's Risk Management office with any questions.

SECTION XI: MISCELLANEOUS TRAVEL EXPENSES

Allowable miscellaneous travel expenses:

The following expenses are considered allowable when traveling internationally on University business:

- Currency conversion fees
- International phone/data charges (if approved by the department)
- Shots/medicine needed for foreign travel

- Visa/passport fees

Unallowable miscellaneous travel expenses:

The following expenses are considered personal expenses and are not permitted on University funds:

- Laundry fees unless granted an exception through the process outlined in Section XIV of this document
- Personal phone charges
- Lost baggage
- Purchase of luggage, umbrellas, clothing, or other personal property items

SECTION XII: RELOCATION/MOVING EXPENSES

Reasonable relocation/moving expenses incurred by a person newly employed by the University are permitted under certain circumstances. Please see the Relocation/Moving Expenses Policy for specific information.

SECTION XIII: REIMBURSEMENT OF NON-TRAVEL EXPENSES

Use of personal funds for non-travel expenses should be limited to only emergencies or specific needs when Mountaineer Marketplace or the PCard cannot be used. Please visit: <http://procurement.wvu.edu/> for guidance on the proper method of ordering/payment. When an employee is seeking reimbursement for a non-travel item, receipts must be submitted with the applicable expense report in **MyExpenses** for all items regardless of amount.

The following items should be purchased/paid using Mountaineer Marketplace or the PCard and should never be paid with personal funds. PCPS reserves the right to deny reimbursement for the expenses listed below:

- Computer supplies (hardware, software, accessories) – Mountaineer Marketplace only
- Equipment - Mountaineer Marketplace only
- Furniture - Mountaineer Marketplace only
- Lab supplies and equipment - Mountaineer Marketplace only
- Office supplies - Mountaineer Marketplace only
- Services - Mountaineer Marketplace only
- Gift Cards or other payments to human subjects/study participants
- Memberships
- Books and other classroom materials

The following items cannot be paid with University funds, and will therefore not be reimbursed:

- Alcohol (unless granted an exception by the University's Chief Procurement Officer when funded by the WVU Research Corp- this exception must be attached to the expense report in **MyExpenses**.)
- Bereavement/get well gifts
- Gifts for personal celebrations- birthday, wedding, baby shower, etc. are not reimbursable, this includes cakes and flowers
- Food and beverage for retirement parties
- Unallowable hospitality events (the University's Hospitality Policy can be found here: <https://procurement.wvu.edu/rules/rules>)

SECTION XIV: REQUESTING EXCEPTIONS TO THE UNIVERSITY'S TRAVEL RULE/MANUAL

Exceptions for airfare class, vehicle class, and meals provided at the conference:

If there is a circumstance (i.e., accommodations made through Medical Management/Americans with Disability Act (ADA)) or specific legitimate business circumstances that requires booking a flight above the best value airfare, a vehicle larger than a full size, or the traveler being unable to consume the meal provided at the business event, that explanation must be noted on the expense report in **MyExpenses**.

Note: medical or personal information should not be listed in the explanation in **MyExpenses**. For example, if a traveler has a medical condition that results in the traveler needing to fly in business class, the medical condition should not be noted in **MyExpenses**. The expense report should simply reference the necessary exception and documentation of the need for the exception should be available upon request from any applicable auditors.

The PCPS Travel Department reserves the right to request reimbursement from the traveler if the exception is deemed unallowable upon review.

All other requests for exceptions:

All other requests for exceptions to the policies and procedures outlined in this manual must be submitted to the PCPS Travel team for approval at travel@mail.wvu.edu. The PCPS Travel team will review the request and promptly provide a response.

SECTION XV: PAYMENT METHODS

Procurement card (PCard):

Travelers should use the PCard and/or other designated University card products as the payment method for all travel expenses except for individual meal expenses and fuel for personal vehicles. If a traveler does not have a PCard and would like to apply for a PCard, please visit <https://procurement.wvu.edu/employees/pcard> for more information.

All expenses paid on the PCard must be reconciled in MyExpenses within the timeframe designated in the University's PCard Manual. All PCard expenses must follow the policies and procedures outlined in the University's PCard Manual.

Expenses paid with personal funds:

For expenses paid with personal funds, employees are responsible for completing an expense report using **MyExpenses** within 30 calendar days after the last day of the approved expense. Expenses submitted to PCPS after 30 days of the last day of travel/expenses may not be considered for reimbursement.

Any expenditure made in foreign currencies must be converted into United States dollars at the rate or rates at which the foreign money was obtained. The rate of conversion and the commission charges must be based on the date of purchase/conversion and provided on the expense report. **MyExpenses** will perform this currency conversion calculation for travelers.

Expenses cannot be submitted for reimbursement until after the trip concludes, including but not limited to airfare, hotel, conference registration, mileage, meals, etc.

Tax exemption:

WVU and WVURC are tax-exempt entities. Please see Tax Services for information on applicable tax exemption: <http://taxservices.wvu.edu/home>.

SECTION XVI: RECEIPT REQUIREMENTS

All receipts for travel expenses must be electronically attached to the report using the options provided within **MyExpenses**. Receipts must be legible and include the vendor name, location, date, and amount.

PCard receipt requirements:

Receipts must be attached to the report in **MyExpenses** for all expenses paid using the PCard and included on the travel expense report, regardless of the dollar amount. See the University's [PCard Manual](#) for more information.

Personal funds receipt requirements:

For all expenses paid using personal funds, receipts are required for expenses \$75 and greater except for the following, which require a receipt regardless of price:

- Airfare- chartered or commercial
- Automobile rentals
- Change fee incurred to obtain lower trip cost
- Change fee incurred for WVU convenience

- Fuel for rental vehicles
- Lodging
- Guardian travel meals
- Rail Transportation
- Registration/Conference Fees
- Car service/limo expenses

Note: if the item is being paid using grant funds, receipt requirements listed in the grant supersede this document. If an original itemized receipt is unavailable, the traveler must certify the receipt copy or other proof of payment through the submission prompts in **MyExpenses**.

SECTION XVII: CONTACT FOR ASSISTANCE

Travelers can contact the PCPS Travel team with any travel-related questions via email at travel@mail.wvu.edu. Travelers are also encouraged to visit the [PCPS website](#) for further information. **MyExpenses** can be accessed through WVU's [Portal](#).