

Select Yes if you have an SMU Provided Vehicle or receive Auto Allowance in Request Settings>Request Information.

Preferred seating should also be entered.

Any frequent traveler membership information should be entered in the traveler's profile. Examples of these types of programs are hotel and airline programs.

Please note that reimbursement will be made via ACH and your bank information must be set up in the A/P system prior to reimbursement being made. Do not submit bank ACH information unless you have an approved travel reimbursement. If you do not have a vendor id because you have not received a reimbursement previously, you should complete a vendor request form:



vendorrequestform.
xlsx

The pre-travel approval must occur before you make the first purchase or travel arrangement/booking.

You must submit a travel authorization request in Concur prior to any booking. All travel must be approved by either the budgetary authority or official designee.

The budgetary authority is responsible for ensuring that the travel expenses charged against their budgets are in full compliance with these procedures.

The Principal Investigator is the budgetary authority for grant/contract funds ("G" Projects) and for compliance reasons, Grant & Contract Accounting will provide an additional review and approval. The traveler should know the sources of funding as the rules may vary depending on the type of funds being used.

The Principal Investigator is responsible for verifying that the expenses are valid expenses and are allowable for the grant/contract in accordance with the University Policy, sponsoring agency requirements, and the terms and conditions of the award agreement. This also includes making sure that the travel costs are in line with the budget and that any sponsoring agency prior approvals are obtained. See section "GRANT & CONTRACT (SPONSORED PROJECT) TRAVEL AND BUSINESS EXPENSE" later in this document.

Grant and Contract Accounting is responsible for ensuring that payment of the expense(s) is in compliance with sponsoring agency requirements as well as the terms and conditions of the award and must approve both the travel request and expense report.

Approvers

Travelers can contact the SMU approved travel management company directly for assistance with complex, group and international travel. Complex travel is an international trip or a trip with multiple destinations.

If emergency or en route changes to travel plans are necessary, the traveler should contact an SMU approved travel management company.

When a trip is cancelled after the reservations have been made, it is the employee's responsibility to cancel the flight, hotel and rental car through Concur or by contacting the travel management company.

Reservations for personal travel cannot be booked through Concur.

Travelers can request a university issued credit card for use when traveling on SMU business. The SMU card is issued to any employee w

information unless you have an approved travel reimbursement. If you do not have a vendor id because you have not received a reimbursement previously, you should complete a vendor request form:

You must clear your travel advance in Concur by assigning the travel advance to your travel report. If all funds from the advance were not used, you must select expense type Cash Advance Return and fill in the description and the amount to be returned. Deposit the unused funds to 1285 12 465004 and attach a scanned image of the deposit slip returning the funds to your travel report along with supporting documentation.

Outstanding travel advances for terminating employees will be deducted from the traveler's final paycheck.

Employee reimbursements from approved expense reports will be processed on the next scheduled A/P run. Payments will be made through ACH to the traveler's bank account provided to A/P. The traveler is responsible for updating the direct deposit information with A/P if changes have been made regarding bank account information since the last reimbursement was made.

Airfare must be booked through Concur.

Travelers should book at the lowest available coach fare. Reservations should be made early, since the lowest fares are usually available with 21 and 14-day advance purchases and ensures the most convenient and cost effective fares.

An exception to coach fare is available if the flight duration is six hours or more without layovers and the appropriate budget authority has approved the business class upgrade. Any other upgrade is considered a personal expense and will not be reimbursed.

Premium seat charges are considered a personal expense and will not be reimbursed.

Baggage charges are allowed if there is a documented business reason or if the trip involves an overnight stay longer than 3 nights.

If a traveler books a domestic flight which is more than \$200.00 above the least logical fare an explanation must be provided in Concur. You will be required to choose the reason from a drop down list. Please choose the most applicable.

The "least logical fare" is:

If a traveler's international reservation's nightly rate exceeds \$350, the traveler must provide an explanation of why the hotel was selected, unless it is a conference hotel. Exceptions to the nightly rates apply for the following cities:

Vancouver/Toronto/Montreal - \$250

The University and the travel management company have discount programs in place with various hotels and the discounted rates are available only when booking within Concur.

Detailed hotel receipts itemizing charges are required for all hotel charges.

Travelers should use discretion when choosing ground transportation availing themselves of the most practical and economic option available. Vehicles can be rented by travelers only when taxicabs, airport buses, airport limos or personal vehicles are unavailable, more costly or impractical, or when business needs require the rental. Vehicle selection should be appropriate to the traveler's business needs and should be booked through Concur.

Rental Cars

The standard approved size of rental car is an intermediate size vehicle. Exceptions can be approved when there are valid business needs for renting a larger vehicle, e.g. transporting a group or research equipment.

Rental car reservations should be booked using the company's preferred provider through Concur. The University maintains a Comprehensive Automobile Liability Insurance Policy to cover bodily injury and property damage liabilities arising out of the use of rented vehicles being driven on behalf of SMU. Therefore, employees traveling on University-related business must decline any insurance coverage offered by the rental car company except in foreign countries where travelers must always accept additional rental car insurance. The University will not reimburse the costs of collision damage insurance unnecessarily acquired from rental companies. When renting a vehicle, the traveler must not accept the fuel option and is required to refuel rental cars per each rental location's refill requirements prior to returning the car in order to minimize costs.

Personal Vehicles

Mileage reimbursement will be computed in Concur using Google map functionality and reimbursement will be at the IRS rate in effect on the date of the travel.

The starting point for mileage reimbursements is from the SMU campus, which is the traveler's work location. This will be selected in Concur – Google map.

The vehicle owner must have public liability insurance in force with at least the minimum coverage required by Texas law. Any damage or loss to a personal vehicle on University business is the responsibility of the owner. When commercial air transportation is available but the individual elects to drive a personal vehicle, the total mileage reimbursement and related expenses such as hotel parking may not exceed the cost of the most economical unrestricted coach fare (at the time that advance air transportation would have been purchased) and related expenses such as taxis/airport shuttles, mileage to/from airport, and airport parking using the lowest daily parking rate. Documentation of the cost of such airfare must be submitted with the reimbursement request.

Parking & Tolls

The University will reimburse for reasonable costs of parking.

Parking reimbursement for trips with duration of longer than one day will be at long-term airport parking rates.

Tolls associated with business travel will be reimbursed. An example is the DFW airport toll.

Other Ground Transportation

The traveler should choose a method of transportation that results in the lowest cost to the University. If bus or rail travel is used, the traveler must select coach class.

Meals while traveling on University business are reimbursable on the basis of actual, reasonable expenses incurred or by the traveler electing to receive per diem. If per diem is elected, it must be used for the entire trip. Travelers who use University issued credit cards to pay for meals while traveling are not eligible to elect per diem.

Business meals that are not part of University travel and include only SMU employees must have a documented business purpose or will be considered personal expense and not eligible for reimbursement

All

Per diem may be elected for lodging or meals and incidentals or both. The election applies to the entire trip. Travelers who elect per diem must provide a detailed hotel receipt for lodging.

- g. Conference – Agenda (meeting schedule) and paid receipt
- h.

Laundry
Liability insurance supplements
Loyalty and frequent flyer program fees
Lost or stolen tickets, cash, or personal property
Meals for trips that do not require an overnight stay
Movies
Parking violations or moving citations
Penalties or fees for cancellation or change of discounted tickets when the cancellation or change results from personal rather than University decisions
Personal expenses
Snacks, unless considered a meal
Trip insurance
Theft, loss or damage to non-business related property
Unused room reservations not properly canceled
Upgrades – air, hotel or car rental

Travel costs charged to a sponsored project must be reasonable and comply with policies established by SMU, sponsoring agency regulations, and the terms of the applicable grant or contract. This may include specific limitations and restrictions. If there is a conflict between a sponsor's rule and SMU's rule, the more restrictive rule will take precedence. The principal investigator/project director (PI) has primary responsibility for compliance with the specific grant or contract requirements.

In addition to the Southern Methodist University policy and procedures stated above, the University is required to apply the following specific policies for travel charged to sponsored projects:

- International travel may require approval from the funding agency from 45 to 90 days in advance by the sponsor's administrative officer, even if it was included in the proposal and/or budget. The definition of what is classified as international travel is determined by the funding agency. (b) (5) - (y) 40

The "Fly America Act" Exception Request form is available on Grant & Contract Accounting's website and must be submitted with the expense report when international travel is booked through a foreign flag carrier and is to be charged to a federal grant or contract. Please be aware that the exception under the Open Skies Agreement does not apply to sponsored projects funded by the Department of Defense or one of its military departments.

Travelers on international trips using federal funds must use the University's travel management company and inform the reservationist that they are subject to the Fly America Act when making airline reservations.

- Allowable airfare costs are limited to the basic least expensive unrestricted accommodations class offered by commercial airlines except when such accommodations would:
 - a.

- Travel reimbursements to independent contractors and other non-SMU employees must not be made using Concur.

Restrictions may differ by sponsoring agency such as some agencies of the State of Texas require prior approval for Domestic travel outside of the State of Texas, set a different rate for automobile mileage than the IRS rate, and do not allow reimbursement for tips. The terms and conditions of the award and agency regulations must be observed.

Violation of this policy, including misuse of a University issued corporate credit card, may result in the loss of University credit card privileges, taxation or loss of reimbursement, disciplinary action including termination or legal action.