



Title: Entertainment, Meals and Travel Expense Policy

Responsible Department: Finance

Effective Date (i.e., date of Presidential approval): 06/24/2024

Contents

1.0: Policy Introduction	3
1.1: Policy Statement	3
1.2: Scope of Policy	3
1.3 Definitions	3
1.4: Roles & Responsibilities	4
1.5: Termination of Employment	5
2.0: Travel	5
2.1: Air Travel	5
2.2: Lodging/Accommodations	7
2.3: Rental Car Reservations	8
2.4: Other Transportation	10
2.5: Telephone & Internet Usage	11
2.6: International Travel	12
2.7: Traveler Safety/Duty of Care	13
2.8: Travel Insurance	13
2.9: Personal, Leisure or Vacation Travel	14
2.10: Spousal/Family Travel	14
3.0: Meals, Gratuities & Tipping	14
3.1: Travel Meals	14
3.2: Business Meals	14
3.3: Group Meals	15
3.4: Alcohol	15
3.5: Gratuities & Tipping	16
4.0: Entertainment	16
4.1: Entertainment	16

5.0: Personal Charges.....17
6.0: Other Non-Reimbursable Expenses17
7.0: Travel (Cash) Advance & Settlement18
 7.1: Requesting a Travel (Cash) Advance.....18
 7.2: Settlement18
8.0: Contacts18
9.0: Appeals19

1.0 : Policy Introduction

1.1 : Policy Statement

The objective of this policy is to ensure that all employees (as defined herein) and approvers of expense reports have a clear and consistent understanding of the University's policies and procedures for entertainment, meals, travel, and related expenses incurred while conducting business on behalf of the University, to establish equitable standards across all departments of the University and to comply with IRS business expense treatment.

All WPI University employees must use University resources wisely and in the fullest support of WPI's mission of education and research. Expenses must be Reasonable and necessary, and employees must always use the most cost-effective means of travel. While no policy can address every scenario, this document is intended to cover the most common situations related to meals, travel and entertainment; where unusual circumstances arise, the spirit of this policy and prudent business judgment should prevail. Expenditures considered excessive in amount or non-compliant with this policy will be subject to denial and/or reduction. Expenses of any amount for travel, meals and entertainment are subject to audit. If found not to comply with WPI policies, the employee will be required to reimburse WPI the portion of expense not compliant with the policy.

All persons incurring expenses on behalf of the University are responsible for understanding and following these policies. Intentional falsification of expense reports, including manipulation of related receipts, is considered fraud and in violation of the [Code of Business Ethics and Conduct](#). Any employee who engages in fraud will be subject to disciplinary action; the University will prosecute such activities as much as law allows.

This policy is a supplement to the [Business Expense Policy](#), which serves as an umbrella to this policy and other finance-related policies. If this policy is more restrictive than the [Business Expense Policy](#), the terms of this policy control.

1.2 : Scope of Policy

This policy applies to:

- All WPI faculty, staff, and students regardless of employment status, as well as any other affiliated parties paid or reimbursed by WPI.
- All entertainment, meals and travel-related expenses incurred that support operations or the conducting of business for, or on behalf of, Worcester Polytechnic Institute regardless of funding source. Any policies and procedures mandated by federal and state regulations, donors, or departments, where more restrictive, take precedence over this University policy.
- Allowable and reimbursable expenditures by contractors and consultants detailed in their contract with the University. Submission of these expenses for reimbursement must be on an invoice from the contractor or consultant.

1.3 Definitions:

Allowable: Reference: Uniform Guidance, Cost Principles for Educational Institutions.

(<https://www.govinfo.gov>). The determination of an allowable expense under a sponsored grant is defined in these principles or in the funding sponsored agreement. Contact the [Office of Sponsored Program Accounting](#) for assistance.

Employee: Faculty, Staff or Student in the employment of Worcester Polytechnic Institute (“University”).

Non-employee: Any individual, including students, contractors or consultants, who is not paid by the “University” through the payroll system.

Out-of-Pocket: Directly paid by an Employee with the personal resources of that person.

PCard: University-issued procurement card.

Reasonable: Reference: Uniform Guidance, Cost Principles for Educational Institutions (<https://www.govinfo.gov>). A cost may be considered reasonable if the nature of the goods or services acquired or applied, reflect the action that a prudent person would have taken under the circumstances prevailing at the time the decision to incur the cost was made. Major considerations involved in the determination of the reasonableness of a cost, include but are not limited to: whether the cost is of a type generally recognized as necessary for the operation of the institution or the performance of the sponsored agreement.

Travel Advance: Cash provided in advance of travel, for travel related expenses.

Unallowable: Reference: Uniform Guidance, Cost Principles for Educational Institutions (<https://www.govinfo.gov>). For the purpose of this policy, unallowable expenses are direct, or indirect costs that cannot be charged to federal grants and contracts. Contact the [Office of Sponsored Program Accounting](#) for assistance.

University: Worcester Polytechnic Institute, which throughout this policy may be referred to as “Worcester Polytechnic Institute,” “University” or “WPI”.

1.4 : Roles & Responsibilities

See [Business Expense Policy](#) for roles and responsibilities. Additional and/or different roles and responsibilities under this policy are:

- Ensure operating or non-operating (grants, designated, gifts, etc.) funding availability prior to travel, meals and entertainment events.
- Provide sufficient business justification for all expenditures.
- Apply this and related policies, guidelines and agreements referenced in this policy to keep expenses to a minimum.
- Book all travel arrangements at the lowest available cost with consideration for the safety and comfort of the traveler. Use [U.S. Flag Air Carriers](#) or [Open Skies Agreements](#) for flights funded by a grant.
- Pay via university issued PCard whenever possible and follow the [PCard Policy/Guide](#).
- The most senior WPI member of the party present during business meal or travel must make the payment if paying for multiple WPI Employees or affiliates.

- Ensure that all expenditures are appropriate, conservative, and consistent with the business needs of the University.
- Return any unused funds provided in advance within fourteen (14) days of travel.
- Submit expense report within thirty (30) days of incurring the expense.
- Keep receipts not uploaded to Workday (for any amount) available for the audit for three (3) years after the incurred expenditure.
- A PCard should be used when travel occurs more than three (3) time per year or for other credit card usage of \$2,500 or more per year.
- Approval of expense reports indicates that submitted expenses have been reviewed and found to comply with WPI policies and guidelines, and if applicable, sponsored program regulations.

Student Organizations and Clubs

- WPI-sponsored off-campus travel for students is administered by University policies, [Student Organization Travel Policy](#) and [Assumption of Risk and Travel Waiver](#), whichever is stricter. Student function and activities must abide by those policies and [Student Organization Manual](#).

1.5 : Termination of Employment

Upon termination of employment, whether initiated by the University or by the Employee:

- All remaining expense reports, University PCard and Travel Advances must be promptly submitted to the University. Contact Finance for further processing requirements and instructions.
- The University reserves the right in accordance with applicable law to deduct monies from the Employee's final salary payment equal to that owed to the University.

2.0 : Travel

Travelers are encouraged to explore alternative methods, such as teleconferencing or video conferencing, to achieve their business objectives before making travel arrangements.

The University PCard is the preferred payment method for University-related travel. If the traveling Employee is not a PCard holder, contact PCardAdmin@wpi.edu for assistance.

All sections contained herein apply to both international and domestic travel unless specifically noted otherwise.

2.1 : Air Travel

2.1.1 : Airline Class of Service & Upgrades

The University will reimburse airfare for regular coach and economy fares only. Additional leg room will be reimbursed (not business/first class) for disability accommodations or for flight time in excess of six (6) consecutive flight hours, excluding layovers. If an employee requires a disability related accommodation for flight of less than six (6) consecutive hours, the employee must fill out the forms located [here](#) and be approved prior to arranging any travel. Exceptions for Business/First class travel require approval by CFO/President and will only be reimbursed for flight time in excess of ten (10) consecutive flight hours, excluding layovers.

In cases when fare types that include luggage charges or seat assignment are more cost-effective than purchasing the two separately, they can be purchased and should be attached to documentation.

2.1.2 : Sponsored Programs & Federal Funds

Additional restrictions apply when funding for flights is from sponsored programs. Prior to making flight reservations, travelers should consult directly with [Sponsored Program Accounting](#) and the appropriate Grants and Contract Administrator to understand all guidelines and restrictions. Violation of any restrictions of a grant may result in the disqualification of the expense and non-reimbursement.

In accordance with the Fly America Act of 1974, [U.S. Flag Air Carriers](#) or shippers must be used when traveling or shipping items and the costs are charged to a federally funded sponsored project. Some exceptions may apply, such as Open Skies, which allows for use of air carriers from countries who have transportation agreements with the U.S. government. Refer to the [Fly America Act | GSA](#) link for additional information.

2.1.3 : Frequent Flyer, Club Membership, Baggage & Air Ticket Insurance

Traveling Employees may retain frequent flyer program benefits earned on flights. Airline carrier incentives or personal frequent flyer programs should not be a determining factor in choosing a flight or airline carrier. However, an Employee can apply their frequent flyer miles for upgrades to the University provided customary standard airfare ticket.

The University does not reimburse travelers for tickets or upgrades purchased with frequent flier miles or credit card reward points.

The University will not pay dues, membership or entrance fees for airline clubs.

A single for domestic (and double for international) standard weight baggage fee will be reimbursed by the University. Excessive baggage charges will only be reimbursed if you are required to carry substantial business-related materials and/or equipment or are on a business trip over five (5) days.

Trip cancellation and interruption insurance will be reimbursed with supporting documentation. Costs such as additional flight insurance, personal automobile and baggage insurance will not be reimbursed. Grants may not allow this expense.

2.1.5 : Changed, Cancelled, Unused/Voided & Lost or Stolen Airline Tickets

Unused tickets or credits for canceled airfare must be applied toward the next business-related trip reservation. Employees who receive a refund directly on a personal credit card from an airline for a canceled airfare that has been previously reimbursed must include the refund as a credit on an expense report and repayment made to the University.

2.1.6 : Air Travel Payment Procedures & Receipt Requirements

Receipts for airfare are required and must include the full flight itinerary including the name of the airline(s), travel dates, traveler name(s), flight information, final cost of the flight(s) purchased and payment method showing the last four (4) digits of the credit card used (bank statement showing last 4 digits of the credit card used can be used as a proof of payment method).

2.2 : Lodging/Accommodations

2.2.1 : Hotel Reservations & Upgrades

Travelers are entitled to accommodations that are safe, well located and meet reasonable standards of cleanliness and comfort. Hotel reservations will be reimbursed for standard single/double room accommodations that meet the above criteria with an itemized receipt. Lodging rates higher than Boston, MA per diem federal lodging rate require documented explanation by the traveler when submitting expense.

Any upgrades require documented explanation in the memo field for the expense transaction in the expense report. Larger lodging accommodations for group travel require documentation of names of the travelers and business connection.

Trips of less than forty (40) miles one way from campus or home, whichever is closer, do not qualify for reimbursement for an overnight stay unless required for circumstances requiring [disability accommodations](#) or business purposes such as late night/early morning presentations, competitions, or events, which must be noted on the Workday expense report in the transaction memo section.

In cases when local accommodations are required, first options for Worcester lodging are Courtyard by Marriott at 72 Grove Street and Hampton Inn at 65 Prescott Street. For details and discounted rates, refer to the [WPI Procurement site](#).

Traveling Employees may retain frequent travel program benefits. Hotel incentive or frequent guest/rewards programs should not be a determining factor in choosing a hotel. However, an Employee can apply their points to upgrade their accommodations. Any membership fees associated with joining/retaining these programs are not reimbursable.

2.2.2 : Lodging Expenses (mini bar, movies, other)

All lodging expenses must be supported by itemized receipts which detail purchases and services provided. Services charged on the lodging folio require additional substantiation.

Non-reimbursable lodging expenses include, but are not limited to, the following list of items:

- Personal entertainment (movies, recreation, or amusement).
- Mini-bar and gift shop items (except bottled water and like items necessitated by the matters of health and safety).
- Haircuts, shaves, manicures, leisure reading materials, shoeshine, or personal products.
- Apparel or clothing, shoes, or accessories.
- Theft, loss, or damage to personal effects.
- Laundry or dry-cleaning charges when the duration of travel is less than five (5) consecutive nights.
- Health club charges related to gym, spa, sauna, or steam room.

2.2.3 : Cancellation Notice

When making reservations Employees should always review the cancellation policy to understand what is required to cancel or modify the reservation.

University will cover cancellation/no-show charges except for repetitive or intentional misuse of the lodging cancellation policy.

2.2.4 : Lodging Payment Procedures & Receipt Requirements

Employees must request the detailed itemized hotel statement/folio for their stay which must include the Employee's name, dates of stay, and payment method showing the last four (4) digits of the credit card used. Any meals such as room service or hotel restaurant charges appearing on the hotel statement/folio require an itemized receipt based on purchasing limits listed in the [Business Expense policy](#).

2.3 : Rental Car Reservations

2.3.1 : Rental Car Reservations

WPI [Vehicle Rental](#) contracts should be used whenever possible when renting a car for business travel. An Employee must consider whether car rental is essential and should only be used when:

- Driving is more cost-effective than other modes of transportation.
- Public, private or carshare transportation is not an alternative or not cost effective.
- Company provided transportation is not available.
- The lack of accommodation near a facility requires the use of a rental car.
- Transporting large or bulky material and/or equipment

Rental car expenses will be reimbursed for cars of Intermediate or less class. When traveling in groups, Employees should coordinate arrival times to reduce the number of cars needed. In such cases, the rental of a larger vehicle to accommodate the business needs of a group is allowed. Any upgrades require documented explanation in the memo field for the expense transaction in the expense report. An Employee should rent the most economical, fuel efficient option considering safety, number of passengers, associated luggage, and driving distance.

Rental car upgrades may be purchased at the personal expense of the Employee. Exceptions may be granted for circumstances requiring [disability accommodation](#).

An Employee is expected to follow all safety and traffic rules, regulations and laws as well as adhere to University policies while driving on university business.

The University will reimburse expenditures for car rental and associated refueling costs supported by itemized receipts. Non-reimbursable car rental expenses include, but are not limited to, the following list of items:

- Replacement of lost/stolen GPS units.
- Theft, loss, or damage to personal effects.
- Traffic citations, parking tickets and other cited violations.
- Child seats or ski rack additions.
- Prepaid fuel.
- Premium radio services.
- Any charges other than base rent and fuel.
- Personal mileage related to the use of a rental car.

2.3.2 : Authorized Rental Car Drivers

Employees listed as a driver must carry a current, valid driver's license. All Employees who may drive the vehicle must be listed on the rental contract.

Additional drivers fee for family members/companions must be paid by Employee or reimbursed to the University.

2.3.3 : Rental Car Insurance

The University has a separate auto insurance policy that provides additional coverage to the insurance offered by all rental car agencies. This insurance covers all rentals used for business purposes. Purchase of rental car insurance is not reimbursable as incremental insurance.

To comply with the terms of the insurance policy, the University must be listed on all rental contracts. Refer to Section 2.6.3 regarding Rental Cars While Traveling Internationally.

Refer to [Vehicle Rental](#) webpage for more information on WPI's contracted rental car company. WPI Business Only rental program includes insurance coverage within all domestic rental rates and Damage Waiver & Limited Liability coverage for truck rental program.

Employees should decline automobile liability coverage when renting a vehicle for University business. Employees should only purchase Rental Car Loss Damage Waiver Insurance (i.e. collision damage coverage) when renting a vehicle at an international location. This option waives WPI's responsibility to pay for a total loss, accident damage, environmental damage, theft and vandalism. These waivers will act like comprehensive and collision policies for the rental so the University is not responsible for administering the collision claims.

2.3.4 : Rental Car Accidents

The University intends to promptly resolve any accident claims involving an Employee who rented a car for University business.

In case of an accident:

- If injuries are sustained, immediately call 911 or the local emergency number.
- The Employee should follow the rental car agency's instructions.
- The Employee must call local police and obtain a copy of the accident report. This will indicate whether a citation was issued and supports the positions of the parties should a dispute arise over fault.
- The Employee should promptly submit an accident report to the rental agency.
- Report the accident to the University's Office of the General Counsel, Talent & Inclusion and the Employee's manager.

Provide the following documentation to the University's Office of the General Counsel:

- Automobile rental agreement
- Copy of Accident Report filed with local police
- Other Information required if not disclosed with above reports:
 - Date of incident
 - Location of Incident
 - Vehicle damage description and photos
 - Injuries sustained (if any)
 - Additional passenger information (if any)
 - Information on other vehicle (owner, operator, address(es), phone number(s), license no., year, make, model, insurance company name, license plate)

The University's auto insurance policy will cover liability insurance claims provided the Employee was not operating the vehicle in a negligent or reckless manner, driving while intoxicated or under the use of a controlled substance at the time of the accident. In these cases, the Employee may be solely liable for all damage to the vehicle(s) and personal injuries resulting from the accident.

The Employee, not the University, will be solely responsible for all damage related to an unreported accident.

2.3.5 : Rental Car Returns

The Employee must refuel a rented vehicle prior to returning it at the end of the rental period to avoid high costs of re-fueling charges by the car rental vendor. Employees who do not refill the rental car prior to its return will have the expense adjusted and reimbursement owed to them reduced by the amount of the re-fueling costs. The Employee will not be reimbursed for the purchase of fueling options provided by the rental companies as part of the reservation.

To avoid disputes, the Employee should conduct a visual inspection with the rental agent both when picking up and returning the rental car.

2.3.6 : Rental Car Payment Procedures

An Employee should use a University PCard to engage the Business Auto Rental Collision Damage Waiver benefit which provides primary collision coverage worldwide up to the actual cash value of most rental cars.

Only under extenuating circumstances if the Employee does not have a University PCard should an Employee rent the vehicle with their own credit card. If not able to use the WPI contracted automobile rental company, check with the credit card company prior to renting the vehicle to verify coverage before declining the physical damage coverage. Note, the Employee's personal automobile policy will be primary when renting a vehicle and the University's automobile insurance will be excess.

2.4 : Other Transportation

2.4.1 : Personal Car Usage Guidelines

The University will reimburse an Employee who uses their personal car for University according the [Standard Mileage Rates](#) published by the IRS annually.

- The University does not authorize the driving of a personal car by a Non-Employee in the conduct of University business. Non-employee driving would not be covered by the University's insurance. For example, an Employee's spouse would not be covered by the University's insurance when dropping off or picking up an Employee from the airport.
- An Employee is expected to follow all safety and traffic rules, regulations and laws as well as adhere to University policies while driving on University business.
- An Employee is responsible for traffic citations, parking tickets or other cited violations of applicable traffic regulations when driving on University business.
- Roadside service is not provided by the University or the University's insurance.
- In case of an accident, immediately notify the police and your personal insurance carrier. The normal course of action is to file claims with your personal auto insurance.
- The Employee's personal auto insurance would be the primary insurance; the University's auto liability is secondary.
- The University is not responsible for physical damage to personal vehicles.

2.4.2 : Mileage Calculations

IRS guidelines dictate that an Employee's daily commute to and from their residence and workplace is not a reimbursable cost. Mileage for trips using a personal vehicle should be calculated by taking the total amount of miles from the place of departure to the ending destination less the "daily commuter mileage".

Employees working from home and wishing to exclude "daily commuter miles" from their mileage calculation must make sure to document that they are serving at, and for, the convenience of the University by working from their home location.

Workday automated mileage calculation is used for mileage reporting on expense reports. Mileage reimbursements made to Non-Employees must include an attachment from Google Maps or similar showing the route and distance driven for mileage submitted more than forty (40) miles.

Fuel, oil, insurance premiums, repairs or other costs presumed included in the mileage rate will not be reimbursed. Repairs to a traveler's personal car, even if these costs result from business travel, are not reimbursable.

2.4.3 : Ground Transportation (Taxis, Ride Shares (Uber, Lyft), Bus & Shuttles)

The most economical mode of transportation should be used when traveling on University business. The University will reimburse taxis, ride shares, bus, or shuttle services with an itemized receipt. The University has discounted rates in place with several shuttle service companies that offer competitive rates. These shuttle services companies should be utilized when traveling from a residence to the airport when the cost of shuttle services are most cost-efficient in comparison to the estimated cost of parking at the airport or other transportation modes.

2.4.4 : Parking, Tolls, Bridge or Tunnel Fees

The University will reimburse for parking, bridge, or tunnel fees while on University business with an itemized receipt. Due to the increasing number of electronic toll booths in various states, individual receipts may not always be available. In these instances, a copy of the toll account statement with specific events highlighted will serve as documentation if charges exceed purchasing limits listed in the [Business Expense policy](#).

Ground transportation, including hotel shuttle services to and from the airport, should be considered if parking fees exceed the cost of ground transportation. When parking is required, the Employee is expected to use the most economical parking facility available.

Bi-directional travel between residence and normal place of business, including parking, is treated as commuting expense and is not reimbursable.

The University will not reimburse parking violations, tow charges, or court costs because of parking violations.

2.5 : Telephone & Internet Usage

Costs for telephone calls, faxes, internet connections or use of the hotel's business center related to University business are reimbursable but should be limited and within reason. Air phone charges are not reimbursable.

Refer to Section 2.6.4 regarding Use of Mobile Device While Traveling Internationally.

2.6 : International Travel

All WPI-Sponsored International Travel is subject to the [International Registration](#) and [International Travel Risk](#) policies.

2.6.1 : International Air Travel

When scheduling international travel that is federally funded, you must ensure that all flights, where possible, are scheduled on [U.S. Flag Air Carriers](#) (including [U.S. Flag Air Carrier](#) codeshares), or a carrier that is compliant under an Open Skies Agreement. Refer to the [Fly America Act | GSA](#) link for additional information.

2.6.2 : Customs

The University and the Employee will comply with all international and local laws on customs declaration restrictions and prohibited articles. The Employee is responsible for any seizures or penalties arising from fraudulently declared or undeclared articles. Any items imported to any country and subject to duty in that country are the responsibility of the employee, except for company property.

2.6.3 : Rental Cars While Traveling Internationally

Employees should consider safety and security risks, as well as local laws and regulations, in making the decision to rent a vehicle in international destinations. Statutorily required rental insurance must be purchased for all international rentals, including but not limited to Liability and Collision Damage Waiver (including visits to Canada, Mexico, Bermuda, Puerto Rico, and the Caribbean).

2.6.4 : Use of Mobile Device While Traveling Internationally

The use of mobile devices on international travel can become expensive due to international roaming charges. Employees are expected to switch mobile plans to international data plan through their cell-phone carrier to keep the cost to a minimum. Other viable alternative means of communication can include authorized electronic mediums such as Skype, FaceTime, etc. When necessary, mobile phones may be rented in some countries for extended stays. A receipt must be submitted that includes all costs for reimbursement.

2.6.5 : Visas

International travelers needing a visa should plan to ensure their required forms are in order. Reimbursement of related expenses to obtain or renew a visa is reimbursable for faculty, staff, and research assistants traveling for WPI-related business, academic or research reasons. Expedited service fees, lodging and travel expenses related to obtaining visa will not be reimbursed unless pre-approved by the Division Head, clearly documented and justified in the expense report.

2.6.6 : Foreign Currency Conversion

While traveling internationally, an Employee should utilize the University PCard as the primary form of payment whenever possible to take advantage of the favorable exchange rates. When using the University PCard internationally verify and/or ask the merchant to charge the card using the local currency.

The University will reimburse an Employee for foreign currency conversion and associated fees if supported by evidence of the exchange rate. Acceptable evidence includes:

- The exchange rate used when converting US dollars to local currency is accompanied by the relevant documentation.
- The amount as detailed on a credit card statement, blocking out any personal account information, or receipt.
- A copy of a foreign currency converter website page that provides the amount based on date of the transaction – for example [OANDA.com](https://www.oanda.com).

Foreign currency transactions and their associated fees should be submitted on the same expense report to ensure full accounting of the entire expense.

2.7 : Traveler Safety/Duty of Care

All WPI-Sponsored International Travel is subject to the [International Registration](#) and [International Travel Risk](#) policies.

It is extremely important that the University has the information available to contact students and Employees on University business. **All travelers on University-Sponsored International Travel are required to register their travel on the [WPI MyTrips Travel Registry](#).** The Employee is responsible for ensuring they have all the necessary vaccination or inoculations needed/required for the country of travel. Any medication should be carried in personal hands or carry-on luggage. Traveler is responsible for ensuring that all medications are allowed in the country of travel.

2.7.1 : MyTrips Registration

[“MyTrips Travel Registry”](#) is a confidential and secure database for maintaining key travel information for all University travelers conducting University-Sponsored International Travel. Registration on the “My Trips” portal ensures that all University travelers can access critical international insurance coverage and emergency medical and security assistance during travel. It is the official and authoritative source of traveler information that forms the basis for the University’s emergency response protocols and communications strategy (e.g., alerts, warnings, evacuation notices) when responding to an emergency or critical incident abroad.

2.8 : Travel Insurance

2.8.1 : Life Insurance

The University provides life insurance for Employees traveling on University business under the general business travel insurance. Coverage begins upon departure from the place of business or residence until return to the place of business or residence, whichever occurs first. Commuting to and from work is excluded. Coverage is further subject to the terms and conditions of the University’s insurance contract.

2.8.2 : Business/Educational Travel Insurance

The University provides additional accident and sickness insurance coverage for all students and program participants including all faculty and staff traveling on University business.

2.8.3 : Travel Insurance

Trip cancellation and interruption insurance for Employees will be reimbursed with supporting documentation.

Lost luggage due to theft or misdirection by the carrier is covered when payment has been made using the University PCard. Coverage under other forms of payment is subject to the terms of personal coverage.

Insurance costs such as additional flight insurance, personal automobile, and baggage, when not included per the above, will not be reimbursed.

2.8.4 : Personal Property

The University does not insure personal property while on travel. The Employee should consult with their own personal property insurance provider for plan and coverage details.

2.8.5 : Theft / Damage of University Property

The University has insurance for university property while on travel. If University property is lost or stolen while on travel, then the Employee must file a police report in the country of travel. The Employee must also immediately contact their manager and/or department that provided the property. If a WPI-issued laptop is stolen, the traveler should notify ITS@wpi.edu immediately.

2.9 : Personal, Leisure or Vacation Travel

Personal travel, stopovers and vacations may be combined with business travel provided there is no additional cost to the University. When a personal stopover or vacation results in a higher cost to the University, the difference will be paid by the Employee. This applies to all travel arrangements including air travel. For air travel, obtain a quote for round trip flight at the time of airline ticketing to substantiate the incremental cost incurred, if any, that would be treated as a personal expense.

The Employee should submit receipts with evidence to support the business portion of the trip and the allocation between the business and personal expenses. This evidence is required when submitting an expense report.

2.10 : Spousal/Family Travel

The University understands that at times family members will travel with Employees and does allow for this. Additional expenses incurred resulting from family members traveling with the Employee will not be reimbursed. The Employee must keep all expenses separate including airfare, ground transportation, meals, and lodging. Family member's travel expenses should not be paid for using a University PCard whenever possible. In cases when PCard was used for combined travel, employee should make clear notations on receipts and in the memo field of the expense report as well as use "personal expense" checkbox on expense report to differentiate spousal/family member travel and reimburse WPI within 30 days of expenditure.

3.0 : Meals, Gratuities & Tipping

3.1 : Travel Meals

Travel meals are reimbursed for overnight travel while performing University business, provided such expense is Reasonable and appropriate. Travel meals are reimbursed based on itemized receipts (see specific requirements and thresholds under Purchasing Limits section of the [Business Expense Policy](#)). Daily Travel meals totaling more than the Boston, MA per diem federal rate require a documented explanation in the memo field for the expense transaction in the expense report.

The University will not reimburse meals of the spouses or family members.

3.2 : Business Meals

Business Meals are meals for WPI employee(s) and/or guest(s) during which University business is conducted, whether on travel or non-travel.

When requesting reimbursement for meals, note the following:

- Name, job title, university/company of each attendee,
- A detailed business purpose or benefit to the University,
- An itemized receipt including proof of payment.

Expense reports that do not include all the required information as listed above will be returned to the Employee for correction. The most senior WPI member of the party present during business or travel meal must make the payment if paying for multiple WPI Employees or affiliates, or provide explanation in the memo field of the expense report why this practice was not feasible during particular meal (donor conversation with most senior member, grant requirement to expense meals on grants by the consumer, etc.).

3.3 : Group Meals

Group meals must be specifically indicated as such in an expense report and include a proper accounting of the number of attendees and names of all who were provided with a meal. If the number of attendees exceeds twelve (12), individual names do not need to be provided but rather a description of the type of attendees (student, sponsor, donor, etc.) as well as any other relevant details (company, team, etc.).

3.4 : Alcohol

Alcohol is not a reimbursable expense at meals or meetings that include only WPI faculty and staff.

Alcohol may not be charged to gift funds or grant funds.

Alcohol purchase and related tax and tip must be coded separately from meals by using Alcoholic Beverages spend category/expense item.

Alcohol will not be reimbursed when external or internal guests are in attendance and a major objective is:

- celebratory event,
- alumni event,
- advisory board event,
- distinguished guest/speaker attendance, or
- recruitment (student/employee) event

Cash Bar Service (where money is physically transacted between the customer and catering/bartending provider at the time of the request for the beverage) is reimbursable for the cost of setting up the bar (bartender labor costs, glassware rentals, etc.) only, and not for the alcohol.

Alcohol is a reimbursable expense during events and meetings if external guests are in attendance and a major objective is:

- A **fundraising event** - a planned gathering or activity organized by the institution with participation from the advancement team with the primary goal of raising funds to support its programs, projects, scholarships, facilities, or other financial needs. Fundraising events aim to attract donors, alumni, sponsors, and supporters who are willing to contribute financially to the university's initiatives and advancement. Approval required by University Advancement.

- A **sponsorship event** - a gathering, event or activity organized by the institution representative with the financial sponsors of WPI for the primary goal of raising sponsorship funds to support WPI's activities, programs, or special events. Approval required by Office of External Relations and Strategic Partnerships.
- A **government/corporate event** - a gathering, event or activity organized by the Office of External Relations and Strategic Partnerships between WPI representatives and government/corporate partners with the primary goal of long-term gains and strategic alignment of WPI. Approval required by the Office of External Relations and Strategic Partnerships.

Alcohol served at WPI events requires administrative pre-approval prior to scheduling the event:

- For Off-Campus events paid by PCard or through expense report – pre-approval through [Workday spend authorization](#)
- For Off-Campus events paid by supplier invoice – pre-approval through [Workday requisition request](#)
- For On-Campus internal events served by the approved WPI catering provider – pre-approval through Events Office [25Live request](#) .

The approval for the following types of events is routed as follows:

- Student Events - Division Head of Student Affairs/Designee
- Employee Events – Division Head of Talent & Inclusion/Designee
- Academic Events – Provost/Designee

On-Campus events paid for by external party (i.e. weddings, conferences) served by the approved WPI catering provider require pre-approval of the Events Office.

Alcohol provided at WPI events is governed by [Events Office protocols and regulations](#).

3.5 : Gratuities & Tipping

It is the Employee's responsibility to exercise good judgement when tipping during business and group meals, as well as during events. The University will reimburse the Employee for tipping expenses considered customary for the location and type of service, not to exceed the local customary amount with a maximum of up to 20%. Tipping over the customary amount will not be reimbursed.

4.0 : Entertainment

4.1 : Entertainment

Entertainment expenses are defined as the cost of amusement or recreation, including theater or sporting events. Reimbursement requests for meals associated with an entertainment expense should be coded to meal/food categories, and event fees should be coded to entertainment category.

Reasonable entertainment expenses are reimbursable when they have a clear business purpose, immediately precede, or follow a business meeting or are necessary to accomplish some useful purpose connected with the University's business.

When requesting reimbursement for entertainment the following is required:

- Date and location of the event.
- A detailed business purpose or benefit to the University.
- Itemized receipt, including proof of payment.
- Tips or gratuities may not exceed the local customary amount not to exceed 20%.
- The name, job title and university or company of each attendee.

Expense reports that do not include all the required information as listed above will be returned to the Employee for correction.

Entertainment expenses exceeding \$1,000 require advanced approval by the WPI FP&A Office. This would exclude student events/entertainment as part of the overall academic/project center experience.

Entertainment expenses associated with, but not limited to, Employee morale and recognition are subject to the [Events Office Catalog](#).

5.0: Personal Charges

The University will not reimburse personal items during travel. The purchase of personal items on the University PCard is strictly prohibited.

Expense reports not submitted within 90 days are considered to be personal expense and may be treated as taxable fringe benefit. Expense reports beyond 180 days may not be reimbursed. PCard privileges may be suspended if expense reports are not submitted on Workday on a timely manner.

If personal charges are made on the University PCard, the Employee must check the personal expense box on the Expense Report and submit a reimbursement payment to Accounts Payable. within thirty (30) days.

Intentional or excessive purchases of personal items may result in the suspension and or revocation of a University PCard. Any Employee who intentionally commits fraud using a Personal or University credit card will be subject to disciplinary action up to and including termination.

6.0: Other Non-Reimbursable Expenses

An Employee must use good judgement and prudence to ensure all expenses submitted for reimbursement are Reasonable and appropriate. Non-reimbursable expenses include, but are not limited to, the following list of items that may or may not have been covered in previous sections:

- Unexplained or unsupported expenses (refer to [Missing Receipt Statement](#) in cases when receipt cannot be obtained)
- Expenses reimbursed by a third party
- Household expenses while traveling on University business
- Childcare and eldercare expenses
- Additional driver fee for family members/companions
- Traffic citations, parking tickets or other cited violations of applicable traffic regulations
- Car washes for personal or rental vehicles
- Annual fees for personal charge or credit cards
- Personal or University credit card delinquency fees/finance charges
- Expenses related to vacation or personal days while on a business trip
- Travel change fees related to personal reasons
- Laundry/valet services for travel not exceeding five (5) consecutive business days

- Personal magazines, books, newspapers, subscriptions
- Kennel and pet-related charges
- Medical bills incurred during travel
- Over the counter and prescription medications
- Priority Boarding airline charges
- Personal entertainment, including sporting events
- Personal toiletries – sundries, mini-bar and gift shop items (except bottled water)
- Health club charges related to gym, spa, sauna, or steam room
- Apparel or clothing, shoes, or accessories
- Family or Non-employee travel cost
- Spouse and family member meals
- Travel expenses in advance of travel unless cash advance is required
- Theft, loss, or damage to personal effects

7.0: Travel (Cash) Advance & Settlement

Costs required to be paid in advance (e.g., airfare, certain lodging, conference fees, etc.) are to be paid by PCard (held by Employee or department admin). Should personal funds be used, reimbursement by expense report will occur after travel has been completed.

Travel Advances may be approved in extenuating circumstances and are restricted to faculty and staff only.

Travel Advances, when issued, are to cover Out-of-Pocket reimbursables such as incidentals, travel meals and other expenses where use of the University PCard may not be accepted. The amount of the Travel Advance requested should be the minimum necessary to cover anticipated Out-of-Pocket expenses. Travel Advances cannot be issued for airfare, lodging, service payments such as honoraria, conference fees or other substantial costs that can be prepaid, prearranged, invoiced, or paid for using the University PCard.

7.1: Requesting a Travel (Cash) Advance

The Employee must request a Travel Advance on the [Spend Authorization](#) in Workday and include a justification of the anticipated travel or business expenses and be approved by the Controller. The Employee will receive payment from the approved Spend Authorization five to seven (5-7) days prior to the travel dates.

7.2: Settlement

The Employee is personally liable for the total amount advanced and is responsible for submitting the correlating expenses in Workday to account for all monies used. The Employee must repay the University for the unused portion of the Travel Advance equivalent to the open balance of the associated Spend Authorization.

Travel Advances not settled within thirty (30) days may be reported as income to the Employee. Once a Travel Advance has been reported as income it cannot be reversed, and the Employee will not be permitted to request a Travel Advance in the future.

An Employee must have all open balances on previously issued advances cleared before the approval of any additional Travel Advances.

8.0: Contacts

Questions regarding this policy and/or the procedures contained in it should be addressed to:

- Accounts Payable accountspayable@wpi.edu
- Sponsored Programs Accounting grantaccounting@wpi.edu – transactions under federal grant, contract, or other externally funded agreement
- Student Organizations and Clubs sao@wpi.edu – student travel and meals

9.0: Appeals

To appeal the denial of a reimbursement, please submit an appeal form located at the [link](#) to Finance Division at financeoperations@wpi.edu.