Travel Policy – Key Highlights

(For additional details including International Travel see: Entertainment, Meals, and Travel Expense Policy)

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.

IMPORTANT DATES

- Expense Report for WPI PCard charges is to be submitted in Workday within thirty (30) days of incurring the expense.
- Out-of-pocket expenses are to be submitted in Workday within thirty (30) days of the end of the trip.
- Expense reports not submitted within 90 days are considered to be personal expense and are treated as taxable fringe benefit.
- Expense reports beyond 180 days may not be reimbursed.

SPEND AUTHORIZATION:

- A Spend Authorization is required for non-grant related travel estimated to be greater than $5,000. Grant-funded travel follows the sponsor's threshold.

EXPENSE DOCUMENTATION:

- Business purpose is required in expense report header
- Receipts are required for all expenses. Attach the receipt to the expense report line for purchases of $75 and up, and for *all* grant-related spend
- Travel Itinerary must be attached when airfare and/or lodging is included in expense report.
- Expenses of any amount for travel, meals and entertainment are subject to audit. Keep receipts not uploaded to Workday (for any amount) available for the audit for three (3) years after the expenditure is incurred.

AIR TRAVEL

- Regular coach and economy fares are reimbursed.
- Business/First class requires CFO/President written approval and is reimbursable only for flights > 10 consecutive flight hours.
- Additional leg room will be reimbursed (not business/first class) for accommodations or for flight time in excess of six (6) consecutive flight hours. Additional leg room cannot be charged to a grant worktag.
- Baggage reimbursement: 1 bag domestic / 2 bags international.
- Seat assignment fees are reimbursable.
- Trip cancellation insurance is reimbursable with documentation (grants may not allow it).

Receipt Requirements

- Airfare receipts must include itinerary, passenger name, dates, airline, total cost, and payment method.

LODGING

- Standard single/double rooms with itemized receipts are reimbursed.
- Higher-than-Boston federal per diem requires explanation.

Receipt Requirements

- Receipts must include guest name, dates, itemized charges, and last four digits of payment card.

PERSONAL, LEISURE, OR VACATION TRAVEL

- Personal time added to business travel that results in cost difference must be paid by employee or reimbursed to university in cases when WPI PCard was used.
- When submitting the combined charges, separate personal and business travel into two lines, designate personal charges, and submit payment to WPI Finance Office.
- At the time of booking a combined business and personal trip, obtain quote for business only travel to prove the cost difference and attach to expense report.
- Must submit receipts showing how costs were split between personal and business.
- Spousal/Family travel is not reimbursable.

RENTAL CARS

Use a rental only if:

- Cheaper than other transportation, other transit options are not practical, is needed due to lodging/location, or transporting equipment/materials.
- Business Travel - WPI contract for car rental should be used

Car Type

- Intermediate or smaller cars are reimbursed.
- Larger vehicles allowed only for group travel or justified business needs; provide clear explanation in the memo/comment fields.

Drivers & Insurance

- All drivers must be listed on the rental agreement.
- WPI carries insurance for domestic rentals—do NOT purchase extra rental insurance.
- Use a PCard to activate WPI's rental coverage.
- If using a personal card, your personal insurance is primary.

Return Requirements

- Refuel charges by rental car company are not reimbursable, refuel before returning.
- Inspect the car with the rental agent at pickup and return.

PERSONAL VEHICLE USE

- Reimbursed at standard IRS mileage rate.
- Daily commuting (mileage to/from your home and regular workplace) is not reimbursable.

GROUND TRANSPORTATION (Taxi, Uber, Lyft, Bus, Shuttles)

- Always choose the most economical transportation option.
- Reimbursement requires an itemized receipt.
- Utilize shuttles with WPI negotiated pricing.

MEALS

Travel Meals = meals during employee's business travel

- Reimbursed only during overnight business travel.
- If daily meal total exceeds the Boston federal per diem, explain the reason in the Workday designated field.
- Alcohol is not reimbursable.

Business Meals = meals where WPI business is conducted with employees and/or guests. For reimbursement you must include:

1. Names and job titles of all attendees
2. Business purpose / benefit to WPI
3. Itemized receipt with proof of payment

Group Meals = meals for groups of more than 12

- Must use "Travel Meals – Group" expense item in expense report.
- If more than 12 people, list the type of attendees instead of individual names (e.g., students, donors, sponsors).
