



Advancement Travel Policy	
Responsible Official: Vice President for University Advancement	Responsible Office: University Advancement

Policy Purpose

This policy applies to all University Advancement staff members and adds information unique to the organization. It does not eliminate or change policies already in effect via TBR 4:03:03:00, General Travel or FP-7, Travel.

Policy Statement

Given the critical importance of travel to the successful accomplishment of the fundraising mission, these policies shall provide guidance and procedures for the management of travel within University Advancement.

Definitions

N/A

History

Effective Date: 02/7/2017

Revision Date: 09/29/2017

Revision Date: 01/15/2019

Revision Notes: This revision changes the approving authority for travel documents to the AVP for Advancement; updates the website for rental car information; adds meals to the list of items not requiring a receipt; specifies that tips are not reimbursable; clarifies the process for submitting claims; and limits reimbursement for local mileage-only claims to those trips over 3 miles.

Procedure (s)

Attachments:

- I. Travel Authorization Request
- II. Travel Claim
- III. Travel Claim – Mileage Only
- IV. Enterprise Roadside Assistance
- V. Auto Accident Reporting Instructions

I. Process/Procedures:

- A. The central Advancement Office will prepare blanket travel requests for Advancement Officers. This document will authorize “area travel” – travel within Tennessee, Virginia, and North Carolina, providing travel can be completed within the same day and the trip is no further than 250 miles. If over 250 miles, or if lodging is required, you must prepare a separate travel request (attachment A).
- B. For all other out-of-state travel, you must prepare a separate travel request.
- C. For help determining whether it’s better to fly or drive and for other travel-related calculations, visit <http://www.travelmath.com/>
- D. When planning trips for which you plan to drive, use the National/Enterprise Trip Optimizer (https://legacy.enterprise.com/car_rental/deeplinkmap.do?bid=028&refId=ETESUNIV) to determine whether it’s cheaper to use a personal vehicle instead of a rental car. If a rental car is needed, you must use National/Enterprise.
- E. If your trip requires 249 miles or less in one day, you can take your personal vehicle and be reimbursed for mileage, versus renting a car. Ensure all travel connected with your trip is considered.
- F. When renting a vehicle at your destination, you must use Enterprise, if available.
- G. When organizing visits, review the prospects’ records in Banner (contact reports, giving, etc.). If you are not the Prospect Manager, check with that person before making contact.
- H. The intent to set up a visit should be in a contact report, to avoid more than one fundraiser attempting to visit.
- I. Travel requests for prospective visits are to be discussed and submitted to the AVP for Advancement at least 2 weeks before travel.
- J. When traveling, Advancement Officers must complete at least three separate visits per day. Contact the AVP for Advancement if you have questions.
- K. Contact reports should be entered into Banner within 1 week following travel and before submitting a request for reimbursement. Attach copies of your contact report to your Travel Claim (attachment B).
- L. Receipts are typically not required for meals nor are receipts required for taxi fares, tolls, or ferry fees, *if reasonable*. In general you should use the most affordable means available. Tips associated with your meals during travel are not reimbursed, since part of your per diem is intended to cover these charges.
NOTE: tips paid for meals to entertain donors/clients (hospitality) are reimbursed, but limited to 20%.
- M. Any personal travel combined with business travel must be approved in advance by the appropriate Dean and the AVP for Advancement
- N. Local travel – mileage-only claims. When traveling in the local area and you are claiming reimbursement for mileage only, follow these guidelines:
 - 1) Keep a log of all area travel, including the date of travel, locations of departure and arrival (complete addresses), and the purpose of each trip.
 - 2) Process travel claims no more often than monthly (Attachment C) and use a separate line for each trip taken during that period.
 - 3) Turn in travel log to appropriate office support staff for processing no later than the third business day of the following month.

- 4) Use Rand McNally (http://maps.randmcnally.com/mileage_calculator) as the source to calculate mileage, or whatever tool is recommended by Procurement and Contract Services. Use round trip mileage if the trip ends where it began. Enter mileage in whole numbers (round to nearest whole number).
- 5) Once the appropriate office support staff member prepares the form, the traveler will sign and the supervisor will approve it as well.
- 6) You cannot claim mileage for travel to the VA campus or within 3 miles of campus, nor can employees who work on the VA campus claim mileage for travel to the main campus.


Related Form(s)

N/A

Scope and Applicability

	Governance	
	Academic	
	Students	
	Employment	
	Information Technology	
	Health and Safety	
	Business and Finance	
	Operations and Facilities	
	Communications & Marketing	
X	Advancement	

Attachment I – Travel Authorization Request



TRAVEL AUTHORIZATION REQUEST

Name: _____ Banner ID: E _____ Department: _____ PO Box: _____
 Phone: _____
 Destination: _____ Departure Date: _____ Return Date: _____
 Status: _____ Purpose of Travel: _____ Name of Event: _____

REGISTRATION AND TRANSPORTATION

Registration: _____ Payment Method: _____
 Transportation-Airfare: _____

Vehicle Calculations
 Personal vehicle estimated cost: Get Mileage _____ - _____
 Enterprise estimated cost: Trip Optimizer Calc OR Direct Bill Reservation _____
Lesser of amounts will be reimbursed when personal and Enterprise costs entered.
 A printout of the Enterprise Trip Optimizer results must accompany any reimbursement request involving personal vehicle travel.

LODGING AND MEALS AND INCIDENTALS

Rates: In-State Rates _____ Out-of-State Rates _____ Out-of-Country Rates _____
 Lodging (if CONFERENCE, WORKSHOP OR SEMINAR, ATTACH BROCHURE DOCUMENTING LODGING RATE) _____ days @ _____ 0.00
Meals and Incidentals Look up rate _____ Actual Daily Rate _____
 Travel Days _____ 1.00 0.75 0.00
 Non-Travel Days _____ 1.00 1.00 0.00
 Other _____

TOTAL ESTIMATE OF TRAVEL EXPENSES

AMOUNT APPROVED IF LESS THAN TOTAL ESTIMATE OF TRAVEL EXPENSES

-

Chart, Index, and Amount to be Charged: _____ SIGNATURES/APPROVAL AS REQUIRED

	Traveler	Date	Dean/Director	Date
	Department Head	Date	Vice President	Date
TOTAL			President	Date


STUDENT ADVANCE REQUEST

NOTES AND COMMENTS

I hereby authorize East Tennessee State University to encumber my records for any temporary travel advances made to me thereby not allowing me access to my grades or to register for upcoming semester classes if I fail to submit a travel claim for the trip or refund the university for the travel advance.

ADVANCE ACCOUNT # 110001-13500 DATE NEEDED _____
 AMOUNT _____
 WHEN TRAVEL IS COMPLETE, UPLOAD ALL ORIGINAL RECEIPTS, APPROVED TRAVEL AUTHORIZATION REQUEST AND TRAVEL CLAIM FORM TO EBUCS.
 REIMBURSEMENT OF TRAVEL CLAIM IS DEPENDENT ON AVAILABLE FUNDS WHEN CLAIM IS FILED.

Attachment II – Travel Claim



EAST TENNESSEE STATE UNIVERSITY

TRAVEL CLAIM

Name:
 Banner ID: E

PO Box:
 Phone:

	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	
Date								T O T A L S
Destination Start								
Destination End								
TRAVEL EXPENSES								
Registration Procord index #, if charged								-
Transportation								
Airfare								
Procord index #, if charged								
Personal Vehicle Miles	-		-		-		-	-
Vicinity Mileage								
Gas-Rental Vehicle	-		-		-		-	-
Other description								
Other amount								
Lodging								
Room Rate								
Lodging Taxes								
Lodging Totals	-		-		-		-	-
Meals and Incidentals								
Daily Rate	-		-		-		-	-
Other Travel description								
Other amount								
DAY TOTALS	-		-		-		-	-

PROCUREMENT OFFICE USE ONLY	Gross Total from all pages	-
CH INDEX ACCT AMOUNT	Less:	
	Advances	
	Procord Charges	
	Prepaid Reg fees	
	Department Deductions	
	Amount due Claimant	-
	Amount due ETSU	-

I certify this claim to be true and correct.

Date

Date

Foundation/Grant Accounting Approval Date

WHEN TRAVEL IS COMPLETE, UPLOAD ALL ORIGINAL RECEIPTS, APPROVED TRAVEL AUTHORIZATION REQUEST AND TRAVEL CLAIM FORM TO EBUCS.

REIMBURSEMENT OF TRAVEL CLAIM IS DEPENDENT ON AVAILABLE FUNDS WHEN CLAIM IS FILED.

Attachment III – Travel Claim for Mileage Only



EAST TENNESSEE STATE
UNIVERSITY

Name: _____

Banner ID: E _____

PO Box: _____
Phone: _____

TRAVEL CLAIM FOR MILEAGE ONLY

For Mileage help click: [Get Mileage](#)

DATE	PLACE LEFT	PLACE ARRIVED	MILES	DATE	PLACE LEFT	PLACE ARRIVED	MILES
PROCUREMENT OFFICE ONLY			0				0
CH INDEX ACCT	AMOUNT	I certify this claim to be true and correct.					
		Claimant's Signature	Date	Approved Signature	Date		
Foundation/Grant Accounting	Date						
WHEN TRAVEL IS COMPLETE, UPLOAD TRAVEL FOR MILEAGE CLAIM AND TRAVEL REQUEST AUTHORIZATION TO EBUCS.							
TRAVEL AUTHORIZATIONS ARE NOT ENCUMBERED. REIMBURSEMENT OF TRAVEL CLAIM IS DEPENDENT ON AVAILABLE FUNDS WHEN CLAIM IS FILED.							
Total miles - Page 1			-				
Total miles - Page 2			-				
TOTAL MILEAGE			-				
MILEAGE RATE PER MILE			0.47				
TOTAL DUE CLAIMANT			-				

Attachment IV – Enterprise Roadside Assistance

This attachment provides information regarding what to do in the case of a flat tire or other breakdown with an Enterprise/National rental vehicle.

- In most cases, a flat tire will not be repaired “at no additional charge:”
 - If the flat is a result of an accident, it will be covered under the Enterprise damage waiver (no additional charge).
 - If the flat is a result of something like driving over a nail, the traveler will incur a charge. Also, if you run out of gas, Enterprise can help but the traveler will incur a charge.
 - If you believe the flat is a result of under- or over-inflation or caused by a previous driver, there may be flexibility.
- Regardless of the cause of the difficulty, Enterprise will still help get the vehicle fixed. You have a couple options if you have a flat/breakdown/run out of gas:
 - Call the Enterprise office closest to you (Google is your friend – there’s an Enterprise office within 15 minutes of 90% of the population!) or you can call 1-800-307-6666. They advise calling the 800 number any time it’s after-hours.
 - Enterprise will ask you if you “accept” the \$65 service fee. You can say yes to this and it should be direct-billed. However, if they ask you to pay, go ahead and do that. There should be no charges beyond this.
 - Keep the receipt and file with your Travel Claim.
 - If you believe the breakdown is the fault of Enterprise or the previous driver, we can reach out to the Enterprise representative after the fact.
 - Call roadside assistance of your choosing (AAA, your insurance company, Billy-Bob’s Towing, etc.):
 - Have the tire/vehicle fixed
 - Personally pay and get receipt
 - File for reimbursement from ETSU, after the fact
 - It appears going through Enterprise would be the cheaper option, so of course that is preferred. But there is a cost to your time as well.

Attachment V – Enterprise Roadside Assistance



State of Tennessee Auto Liability Program
A Program of the Tennessee Treasury Department
Division of Claims and Risk Management

Auto Accident Reporting Instructions

IF YOU ARE INVOLVED IN AN AUTO ACCIDENT WHILE DRIVING A STATE VEHICLE, RENTAL, OR YOUR OWN VEHICLE WHILE IN THE COURSE OF YOUR EMPLOYMENT, FOLLOW THE INSTRUCTIONS BELOW:

- 1.** Don't leave the scene. Be prepared to communicate ALL details of the incident to the State's adjuster.
- 2.** Call emergency services (911 or police non-emergency number) as needed.
- 3.** Take at least 4 photos of both vehicles, license plates, parking situation, insurance card for other party, and any notable unrelated damages. Include photo of the other party if applicable.
- 4.** Call the State of TN Auto Accident Call Center immediately to report the incident, then call your supervisor and follow your department's applicable procedures.
- 5.** Do not admit fault in the accident or promise coverage or reimbursement to anyone.

**State of TN Auto Accident Call Center:
(855) 253-0629**

Be prepared to provide the following information to the Call Center:

- Incident date, time, and location
- State driver's name, phone number, and email
- Any/all other drivers' names and phone numbers, plus emails if available
- Any other involved passengers' names and phone numbers, plus emails if available
- Vehicle information for all vehicles, including license plate number and/or VIN
- Your State Supervisor's name, phone number, or other contact information
- Confirm if any fatalities or non-fatal injuries occurred

IF YOU HIT AN UNOCCUPIED VEHICLE:

- 1.** Fill out a Damage Notification Card and leave it on the unoccupied vehicle.
- 2.** Call the State of TN Auto Accident Call Center immediately at (855) 253-0629 with date, time, and location of the incident, as well as any additional information you may have.
- 3.** Take photos of both vehicles, as well as the license plate and VIN tag of the other vehicle (on the driver-side dash, near the windshield).

