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/](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](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

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## Travel Authorization Request

**TOTAL ESTIMATE OF TRAVEL EXPENSES**

- **Airfare**: $0.00 (Estimated cost)
- **Vehicle Mileage cost**: $0.00
- **Personal Vehicle**: $0.00
- **Per diem**: $0.00
- **Registration**: $0.00
- **Lodging**: $0.00
- **Meals and Incidentals**: $0.00

**TOTAL**: $0.00

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**NOTES AND COMMENTS**

- (Space for comments about the travel plans)

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**SIGNATURES/APPROVAL AS REQUIRED**

- (Signatures of authorized individuals)

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**TRAVELER**

- [Name]

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**DEPARTMENT HEAD/DEAN/DIRECTOR**

- [Name]

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**VICE PRESIDENT**

- [Name]

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**PRESIDENT**

- [Name]

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**DATE**

- [Date]

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**TRAVEL EXPENSES**

**TOTALS**

**Procurement Office Use Only**

**Travel Claim**

**Name:**

**Program:**

**Department:**

**Routing:**

**Travel:**

**Expedited:**

**Date of Request:**

**Class:**

**Plant/Office:**

**City:**

**State:**

**Zip Code:**

**Number of Days:**

**Name:**

**University:**

**East Tennessee State University**
Attachment III – Travel Claim for Mileage Only

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Certify this claim to be true and correct.

Procurement Office Only
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:”
  o If the flat is a result of an accident, it will be covered under the Enterprise damage waiver (no additional charge).
  o 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.
  o 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:
  o 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.
  o 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
  o 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.
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).