Travel Policy & Procedures

Division of Business and Finance
Office of Purchasing and Travel

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Section 1 - General Information

100. Introduction

Section 25-3-41, Mississippi Code of 1972, establishes guidelines for travel reimbursement of officers and employees of the State of Mississippi, and of any department, institution, board or commission thereof. It also provides that the Mississippi Department of Finance and Administration (DFA) shall promulgate rules and regulations to effectuate economies for all expenses. The provisions governing reimbursement of actual expenses such as meals, lodging, and other costs apply to all Jackson State University (JSU) employees and students.

The JSU Travel Policy Rules & Regulations is a travel manual that is intended to serve as a quick reference for the provisions of Section 25-3-41, Mississippi Code of 1972 as well as rules and regulations adopted by the DFA affecting all areas of reimbursable state travel.

Each employee and/or student traveling on official JSU business is an official representative of Jackson State University. It is essential that the purpose of the trip, the nature of the business, and the manner in which it is carried out conform to the mission of JSU.

Employees are expected to adhere to these guidelines. From time to time, scenarios may emerge that warrant approved deviation from these guidelines. Such deviations require **written justification from the traveler and all approvers' consent**. Willful disregard of this policy shall be considered non-compliance and may result in a formal reprimand up to and including termination. (See Section 11 - Waivers)

State travel regulations are also contained in the Mississippi Agency Accounting Policies and Procedures (MAAPP) Manual - Travel, Section, 19.

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101. Definitions

A. **Emergency Travel Status -** The official status of an employee when away from the employee's Official Duty Station and Official Residence on official state business during an emergency, as declared by JSU's President or the Institutions of Higher Learning.

An employee may claim mileage reimbursement to travel from one office or regular place of work to another place of work, or from home to his Official Duty Station or any temporary work site, if the travel is necessitated by an emergency and it occurs outside the normal working hours of the employee.

There are no regulations set by DFA determining how many miles one must travel to be eligible for meal reimbursement or lodging reimbursement.

B. **International Travel -** All travel to areas other than of the 48 contiguous United States, Hawaii, and Alaska.

C. **Meal Reimbursement -** Reimbursement of actual cost of meals when an employee is in travel status. Reimbursement shall not exceed the amounts set forth by DFA. Meals are reimbursed based on actual costs not to exceed the maximum daily reimbursement for the location of travel.

D. **Mileage Reimbursement -** The rate set forth per Section 25-3-41, Mississippi Code of 1972, which mandates that state officers and employees traveling on official state business in their private vehicle be reimbursed at the same rate federal employees are for official federal business in a private vehicle. The current reimbursement rates are set forth in the DFA Mileage Reimbursement Rate Memo. This memo is available at https://www.dfa.ms.gov/travel. (*See "Hotels, Meals, Miles & Reimbursements" Section)*

E. **Official Duty Station -** The city, town, or other location where the employee's regular place of work is located, or the city, town or location where the employee's primary work is performed on a permanent basis. If the employee regularly works in two or more areas, his official duty station shall be where the regular place of work is located. The regular place of work should be determined by JSU's President or his/her designee based on total time ordinarily spent working in each area and the degree of business activity in each area.

F. **Official Residence -** The city, town, or other location where an employee maintains a residence which is used as a primary domicile by the officer/employee. Determination by JSU's President or authorized designee regarding an employee's residence is to be based on items such as voter registration, ownership, or long-term rental of a personal residence, and the permanent address carried in the officer/employee's personnel file.

G. **Prior to Trip Expense -** Allows travelers to pay vendors directly for conference registration or other costs through the requisition, purchase order and check disbursement process in Banner PAWS. These are paid prior to traveling and should be allowed plenty of time in advance of the trip. Approval of these costs is necessary before the expenditure is made.

H. **Public Carrier -** Any entity that offers transportation of people to the public for pay, which may include airlines, buses, rental vehicles, and trains.

I. **Regular Place of Work -** The city, town or other location at which the employee works or performs services on a regular basis. Mileage is not reimbursed between any regular place of work and home.

J. **Restricted / Non-Refundable Airline Tickets -** If a passenger uses this type ticket, none of the money paid for the ticket will be returned. Most airlines will allow unused tickets to be used as a credit towards future travel after paying a fee to change the ticket.

K. **Taxable Meals -** Those meal expenses incurred during official travel where an overnight stay is not included.

L. **Temporary Place of Work -** The city, town or other location at which the employee performs services on an irregular or short-term (generally one year or less) basis. Employees traveling on official business will be reimbursed for authorized and documented expenses between home and the temporary place of work, provided the temporary place of work is not within the city, town, or location of their regular place of work.

M. **Travel Status -** The official status of an employee when away from the employee's Official Duty Station and Official Residence on official state business. The employee who works in two or more offices or regular places of work may claim mileage reimbursement to travel from one office or regular place of work to another place of work, but not between any regular work site and home, regardless of the distance of the commute. Travel status is defined as trips that exceed twenty-five (25) miles from the main work location. Travel status for trips that include students is defined as any distance from their primary JSU location.
An employee is not in travel status and shall not receive lodging or meal reimbursement while at his Official Duty Station. **An approved travel request determines when an employee is in travel status.**

N. **Unrestricted/Refundable Airline Tickets -** Unrestricted airfares allow for refunds and changes in travel dates without penalties. Different airlines have different procedures for refunds and changes. This airfare usually has no special advance purchase, Saturday stay, or certain days to travel requirements.

102. Administration & Responsibility

The Jackson State University Office of Purchasing and Travel, located within the Division of Business and Finance, administers JSU's Travel Program.

A. The Office of Purchasing and Travel:

- Processes travel requests, sets purchase orders for reimbursements, and administers use of the JSU's travel card program;
- Works with faculty and staff who travel with and without students;
- Works with the Office of Grants and Contracts to coordinate travel with Federal Fund sources;
- Coordinates logistics for travelers in concert with state contract travel agent.
- Processes travel advances, requests for reimbursement and prior to trip expenditures that originate as Banner PAWS requisitions;
- Is responsible for ensuring compliance with Section 25-3-41, Mississippi Code of 1972, by providing adequate internal controls over travel operations; and
- Provides JSU employees with informational and training material regarding the JSU Travel Program.

B. Department Directors will:

- Designate an existing employee(s) to serve as a departmental travel coordinator(s) for the purpose of monitoring employee compliance with these regulations and timely submission of travel documents.

C. Department Travel Coordinators will:

- Monitor employees' compliance in accordance with these rules and regulations;
- Assist employees with questions and problems related to travel arrangements and reimbursement, including, but not limited to assistance with completing and submitting travel documentation;
- Serve as liaison between Department/Division and JSU's Office of Purchasing and Travel;
- Make airline/railway travel, vehicle rentals, and lodging reservations for that Department's employees through the state contract travel agent or travel system. This is not meant to indicate that no one else can make such arrangements, but rather to suggest that it is easier to monitor employee compliance when travel is handled by one person; and,
- Ensure that all employees are aware of and familiar with the guidelines set forth in this manual and that they understand that they are required to adhere to the established state travel policies and contracts.

Section 2 - Travel Request and Expenditures

103. Travel Request

Travel requests must be signed by the traveler. The signature is a certification by the traveler that business travel is being requested for valid business expenditure. The travel request **MUST** be completed and approved by all signatory parties.

The travel request form is the standard form used by JSU employees for requesting approval of travel, and is required to be filled out and approved prior to trip expenses, and/or to receive travel advances and reimbursements. The Travel Request Form and its instructions can be found on the JSU website at https://www.jsums.edu/businessfinance/purchasing-and-travel/. Include with this form, as applicable:

- Airfare from state travel agent or two (2) quotes from traveler
- Confirmed hotel reservation
- Event/activity information & clarity on whether Travel Office needs to complete event registration (i.e., Conference Registration, etc.)
- Verification (email from JSU Fleet) on whether vehicle was available if traveling by car

(Refer to ***Section 10. Forms and Procedures*** *for additional information related to types of Travel Request Forms and Travel Reimbursement Forms)*

104. Travel Advances & Prior to Trip Expense

Travel Advances (In-State, Out-of-State, International)

Travel advances are authorized by Section 25-1-79, Mississippi Code of 1972, if approved by all parties on the travel request. Any JSU employee traveling on official state business may receive an advance for the purpose of travel expense. A travel advance cannot be requested for less than $50. An advance will not be issued earlier than twenty (20) days before the travel start date. Within ten (10) days of the employee’s return from the travel, a Reimbursement Request Form must be completed and the advance settled. All travel advances must be settled before submitting an expense report for reimbursement.

A minimum estimated reimbursable cost of $50 is required to be eligible for a travel advance.

The Executive Director of JSU Human Resources has the authority to withhold payment of further claims for reimbursement if any outstanding advances have not been settled. (Section 25-1-81, Mississippi Code of 1972.)

If an advance is not settled within ten (10) working days after the end of the month in which travel was completed, the employee's paycheck may be held until the debt to JSU is resolved. Only two (2) travel advances shall be outstanding at one time.

Prior to Trip Expense (PTE) (In-State, Out-of-State, International)

The Prior to Trip Expense (PTE), via a requisition submitted through Banner PAWS, allows travelers to pay for registration or other travel-related purchases prior to traveling. PTE can be paid any time prior to the trip and is not subject to the twenty (20) day prior to travel limit rule imposed for travel advances.

The PTE is necessary to accommodate payments required to be made in advance. The PTE should only be processed if the amount of time before travel allows a Banner PAWS requisition, purchase order, and check disbursement to the vendor. Allow at least three (3) weeks' time prior to the travel start date.

105. Travel Reimbursement / Settlement of Travel Advance

An employee traveling on official JSU business is expected to exercise the same care incurring expenses as would a prudent person traveling for personal reasons. Travel for business should be conducted at a minimum cost for achieving the success of the mission. Travelers shall request air, train, bus, hotel and/or vehicle rental reservations as far in advance as possible and shall utilize the lowest logical rate available.

Travel reimbursement will be made for all taxes paid by the traveler However, when expenses are billed directly to the governmental entity, MS state sales taxes must not be charged or paid. To be eligible for reimbursement, the employee must have a W-2 on file with the Office of Human Resources or receive the maximum state reimbursement rate allowed as per diem in lieu of salary.

Within **ten <u>(10) business days</u>** of returning to their regular place of work, the traveler shall submit a request to the Office of Purchasing and Travel for reimbursement of out-of-pocket expenditures incurred during the trip and budgeted for in the travel request.

Receipts are required for all non-meal costs that exceed $10. Meals are reimbursed at the per diem rate of the location of the trip.

Penalty of Fraudulent Claim -- The Mississippi Code of 1972, Annotated, Section 25-3-45 provides: "It shall be unlawful for any person to claim, receive, approve, or allow any item of expense for official travel in excess of that authorized by Section 25-3-41, Mississippi Code of 1972. If any person shall knowingly and willfully violate any of the provisions of said section, such person shall be guilty of a misdemeanor and, upon conviction, shall be punished by a fine of not more than two hundred fifty dollars and, in addition, shall be removed from the office or position which he holds. Such person shall also be civilly liable for the full amount of the expense account illegally received, allowed, or approved by him, and the person receiving same shall be so liable whether the violation be willful or not."

Per IRS regulations, travel expenses that are not reimbursed within sixty (60) days of travel become taxable to the employee. JSU has determined the added administrative burden of tracking and filing this additional income is not in the best interest of the University, therefore, employees <u>SHALL</u> submit all travel reimbursement requests within 60 days of the end date of travel. JSU strongly encourages that the submission of travel expenditures be submitted within ten (10 business days.

Travel Reimbursement Requests must be signed by the traveler. The signature is a certification by the traveler that reimbursement is being requested for actual expenses that are valid business expenses.

All reimbursement requests must have the original receipts attached to claim reimbursement of expenses except for per diem for meals and incidental expenses (M&IE). M&IE and lodging will be reimbursed at the current General Services Administration (GSA) maximum daily per diem rate, except for the first and last day of travel. **M&IE will be reimbursed at 75% of the maximum daily per diem rate for the first and last day of travel**. (Refer to <u>https://www.gsa.gov/travel/plan-book/per-diem-rates</u> for per diem rate by state) Prior approval must be granted by the JSU Office of Purchasing and Travel if the reserved lodging rate exceeds the current daily lodging per diem rate.

Receipts must be submitted for hotel, airfare, parking, and all other charges in excess of $10. **<u>BANK OR CREDIT CARD STATEMENTS ARE NOT ACCEPTABLE</u>**.

When submitting mileage reimbursement, gas receipts are not allowable. Gas receipts are allowable when renting a vehicle, or using a JSU fleet vehicle.

Meals shall not be claimed as expenses if the meals are included in the conference registration fee.

Meal tips should be included in the actual cost of the meal unless the inclusion of the tips causes the meals to exceed the Department of Finance and Administration's maximum daily meal reimbursement rate. If the daily meal limitations are exceeded, then the tips can be separated and recorded as other expenses. All tips reported in this manner should be totaled for the day and not exceed twenty percent (20%) of the maximum daily meal reimbursement or the actual meal expense, whichever is less.

If two or more travelers share a hotel room, each traveler should report their pro rata share of the costs. If one of the travelers does not have an original hotel invoice, a copy of the invoice, along with the name of the traveler who submitted the original invoice, should be submitted with the reimbursement request. (See Section 6 – Lodging)

Section 3 – Transportation

106. Travel Routing

Whether by public transportation, privately-owned vehicle, state-owned vehicle, etc., reimbursement will be made for the most direct practical route. The least expensive and most practical method of transportation should be used.

107. Combining Business Travel with Personal Travel

Business travel and vacation/personal leave may be combined when **all** of the following conditions are met:

- The primary purpose of the trip is official state business;
- The employee uses their approved leave for the personal part of the trip;
- JSU incurs no expenses beyond what it would have incurred had there been no personal travel involved in the trip. (If the employee would normally be expected to arrive the day before, or remain in the area of official business overnight and return the following morning, and does so, expenses for either/both night(s) and the appropriate meals will be allowed.); and,
- The contract travel agency should be advised that the business portion of the ticket will be billed to JSU and the personal travel portion to the employee's personal credit card at the time the transportation reservations are made.

Note: Business related airfare combined with personal airfare is an unauthorized expense when using the Travel Card.

108. Vehicle Travel

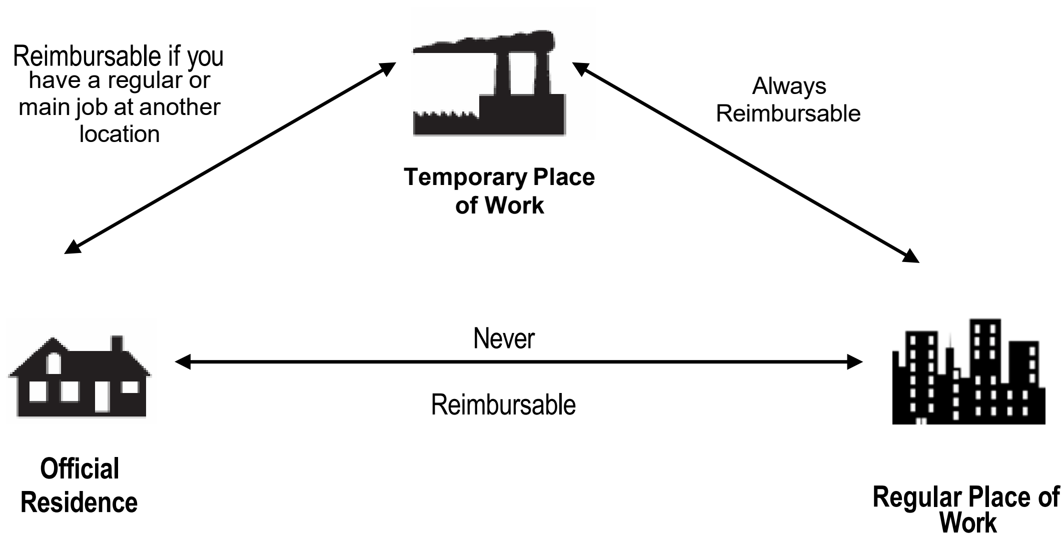
Private Vehicle Used for State Business

Reimbursement for the use of a personal vehicle for official JSU business (includes private airplanes flown by the employee) is based on actual miles traveled and will be at the same rate that federal employees are reimbursed for using private vehicles for official federal business travel. The General Services Administration, commonly referred to as GSA, not the IRS, publishes this rate. The current reimbursement rate is listed in the Mileage Reimbursement Rate memo. Mileage reimbursement shall not exceed the maximum published rate.

When two or more employees travel in one private vehicle, only one travel expense at the authorized reimbursement rate per mile shall be allowed. The person claiming reimbursement shall report the names of other state employee passengers. If a cost comparison must be made between driving vs. flying cost, see next page. JSU does not reimburse private vehicle mileage for optional travel.

Whenever the cost of using a personal vehicle is less than that of the rental rate and less than the JSU Fleet Transportation reimbursement or JSU Fleet Transportation is unavailable, employees may elect to use their personal vehicle and receive reimbursement at the maximum approved GSA mileage reimbursement rate. A quote must be provided to support this exception.

Quick Tip: When Are Transportation Expenses Reimbursable?



Checking JSU Transportation for Use of a Vehicle and Calculating Mileage Reimbursement Rate

When a vehicle is required, the traveler shall first check with JSU Transportation to verify whether or not a fleet vehicle is available for their use. If it is, then the traveler can either elect to use the JSU vehicle, or use their personal vehicle and be reimbursed at a reduced mileage rate as per the Mileage Rate Reimbursement Memo. If there is no JSU vehicle available, then the traveler can either use their personal vehicle and receive the maximum mileage reimbursement rate or rent a vehicle from a state contract.

Rental Vehicle Used for State Business

When a rental vehicle is used, the actual cost of the rental vehicle and fuel can be claimed for reimbursement only, rather than mileage. Rental vehicles as well as fuel for rental vehicles are authorized charges on the Travel Card.

A mid-size vehicle is normally the largest rental allowed unless a larger vehicle is needed for a reason justified to approvers of the budget that will absorb the trip's cost. Naturally, there will be occasions for which a larger vehicle will be required in order to carry out JSU business. Justification submitted in the travel request, if approved, will be accepted as the explanation of why a larger than mid-size vehicle is required.

Instructions on how to rent a vehicle using a state contract are available at https://www.jsums.edu/facilities/transportation-and-fleet-management-unit/. The corporate identification number listed in the contract must be referenced to obtain the state contract price. If asked, when picking up the vehicle, be prepared to show identification. An employee name badge, business card, or letter from the supervisor will be sufficient. The contract references coverage of insurance information. **The option to purchase insurance should always be declined when utilizing a state contract.**

The current vehicle rental contracts include unlimited mileage and CDW/LDW insurance. Fill the vehicle with gasoline prior to return. You may be charged up to the amount per gallon as listed in the state contract for a full tank of gasoline even if the tank is 3/4 full when returned.

You must always be covered by insurance either provided by the state contract or by purchase, should you utilize a vendor that is not on state contract.

Calculating Reimbursement for Driving vs. Flying

When travel is by private vehicle, the total travel expenses reimbursed, including meal and lodging costs incurred as a result of driving instead of flying, shall not exceed the cost of the lowest unrestricted air fare unless a complete written justification signed by the employee's budget approver determines that it is in the best interest of the employee and JSU that the employee drive, or that, on comparison of "total driving" and "total flying" expenses, it is less expensive to drive than to fly. If the employee chooses to drive and expenses exceed the cost of the lowest unrestricted air fare, reimbursement will be limited to the cost of flying.

To determine reimbursable driving expenses the "total cost of driving" must be compared with the "total cost of flying".

"Total cost of driving" shall include en route meals, en route lodging, and the official rate for mileage reimbursement when a private vehicle is used for state business.

"Total cost of flying" shall include the lowest unrestricted air fare, any charges for shipping of equipment and/or supplies required at destination, and required ground transportation at destination, e.g., taxis to/from meeting site. If a vehicle is deemed to be required at the destination, then the cost of a rental vehicle will also be included in this total cost for comparison.

In order to be reimbursed for mileage, meals and lodging for approved travel to/from an out of state destination when an employee drives and there exists reasonable air service, the reimbursement request must include a written statement **specifically** making one or the other of the following statements:

"It is less expensive for (employee name) to use their private vehicle for travel on (date from), (origin), (date to), (destination)."

"In my opinion, it is in the best interest of JSU that (employee name) use their private vehicle for travel on (date from), (origin), (date to), (destination)."

If the driving expenses will be held to the lowest unrestricted air fare, that fare should be checked and noted that reimbursement is being restricted to that amount, or if it is evident that driving is cheaper than flying, such as (to/from New Orleans, Memphis, Mobile, Birmingham), no further authorization is required.

If a cost comparison must be made between driving versus flying cost, the cost of flying should be multiplied by the number of passengers and compared to the cost of driving.

109. Public Carrier (Airplane)

Airline Travel – General Information

Employees must make reservations for public carrier (airline, etc.) travel arrangements using the JSU state contract travel agency. A passenger receipt and itinerary shall accompany the request for reimbursement to support the charge on JSU's travel credit card.

When traveling by regularly scheduled air service, travelers are to utilize their local airport. Use of the local airport is assumed to result in travel costs that are most economical. Mileage to and from the airport is reimbursable.

The criteria for determining which airport or mode of transportation to use should be based on travel costs that are most economical. All costs should be considered, i.e., travel, labor, lodging, meals, mileage reimbursement, etc., in making the determination.

The least expensive routing shall be used. In calculating the difference between airfare and travel by personal vehicle, factor in additional lodging and meal expenses, taxi fares, parking, and other airport related expenses.

Alternate departure and return dates and times should be considered by all travelers when they will result in lower fares. It is incumbent upon the traveler to provide information to the travel agent which could result in lower fares.

"Direct" does not mean nonstop. It only means that you will not be changing aircraft. Choose the flight with the fewest stops for fewer chances for delay. A "direct" flight with only one stop might be preferable to connecting nonstop flights, however.

Preferred seating, business, or first-class service **may** be authorized if at least one of the flight segments exceeds 6 hours. A flight segment is defined as time in the air between stopovers, changing aircraft, or change of airline. Preferred seating, business or first-class travel is not reimbursable unless approved in advance.

Airline Penalty Fares

Airline penalty fares may be utilized when needed. JSU will honor requisitions for warrants in payment of penalties or administrative fees when business circumstances require that reservations be changed or canceled. Such tickets are non-transferable. Although the ticket is issued in the employee's name, the ticket belongs to JSU.

To obtain the lowest possible penalty fare, airline travel should be booked as far in advance as possible.

Where the employee is required to go a day early to qualify for a lower priced penalty airfare, JSU will pay the additional lodging and meal expenses not to exceed the amount of savings in the airfare.

Most carriers require that changes be made and re-ticketed on or before the departure date of each ticketed flight. You may be able to exchange the return portion for a fee. Carriers may also charge a fee for customers who standby for an alternate flight on their ticketed day of departure. Check with the airline or the travel agent for more information. A receipt for any fees charged should be attached to the reimbursement request for reimbursement to the traveler.

Airline Reservation Changes

1. **Involuntary**

   A note of explanation should be attached to the reimbursement request if an involuntary airline reservation change results in additional reimbursable expense.

2. **Voluntary**

   Voluntary en route changes in travel arrangements should be handled through the original source of the reservations. If the change is for personal reasons, JSU will not reimburse any fees imposed by the airline or the travel agency.

   If the traveler is outside the continental U. S. and changes are required, make the change as needed and attach a note of explanation to the reimbursement request.

Airline Travel Invoices

Airline tickets purchased from a state contract travel agency shall be directly billed to a JSU travel credit card or personal credit card. The travel agent will not issue invoices for later payment.

Delayed or Canceled Flights

Ensure that the airline or travel agent is able to contact you when there is a cancellation or delay. Give the travel agent your contact information and keep the agency's contact information with you. Check the status of your flight directly with the airline at least 24 hours prior to departure (48 hours for international flights) by visiting the airline's website.

If you are at the airport and find your flight is canceled or severely delayed, contact JSU's travel agent for assistance. Also, email the Office of Purchasing and Travel if assistance is needed at travel@jsums.edu or call 601-979-0869.

Baggage Allowance Information - Domestic and International

Charges for baggage at check-in may vary per airline. Baggage fees are reimbursable expenses and are an authorized expense on the Travel Card. **A receipt is required for charges in excess of $10.00.**

The traveler is responsible for knowing the baggage allowance information for their flights.

Delayed, Lost, and Damaged Baggage

- Keep all items necessary for the trip in a carry-on bag if possible.
- Check with the airline for policies regarding carry-on items.
- Check your luggage before leaving the airport for visible signs of damage. You should make a claim for lost or damaged articles as soon after arrival as possible.
- If you find that your luggage is not at the airport, go to the airline's lost baggage office or to the ticket counter and file a "lost baggage claim".

Flight Insurance

Travel Accident Coverage is included for any scheduled airline transportation when a ticket is purchased with a JSU travel credit card. Some of the state contract travel agencies also provide flight insurance with ticket purchases. Additional flight insurance will not be reimbursed.

Section 4 - Conferences, Seminars, and Workshops

110. In-State/Out-Of-State/International Conferences

Section 25-1-83 of the Mississippi Code requires prior written approval for employee attendance at any convention, association or meeting in order for expenses to be reimbursed. Such reimbursed expenses must then be annually reported to the Legislature. **Any travel requiring the approval of the JSU President must be submitted at least one (1) month in advance of the departure date**. Exceptions for approval less than 30 days will be granted at the JSU President's discretion.

Conference Airlines

Check conference materials to see if special airline discounts are offered. When a special airline discount rate is offered and conferees are instructed to go directly to an airline or a specific travel agency to obtain the discount fare, all fare and file number information may be given to a state contract travel agency. They will then attempt to obtain the conference rate, or lower rate, for the employee.

Conference Hotels

When hotel rooms are blocked for a conference, seminar, etc., and a special discounted hotel rate provided, the employee should go through the conference housing bureau or directly to the hotel to obtain lodging. The state contract travel agencies will not make reservations for conference hotels. **A copy of the conference literature showing the conference hotel and rate or the registration form which often includes the housing reservation must be attached to the reimbursement request**.

Reimbursement to employees for hotel deposits paid prior to completion of travel can be authorized using the PTE (Prior to Trip Expense) process with a Banner PAWS requisition, PO and check disbursement.

Travel Tip: **Be sure to check the cancellation policy. Hotel charges will not be reimbursed if the employee is negligent in canceling reservations in accordance with the hotel's policy.**

Reservations should be made as soon as possible to guarantee stay in a conference hotel.

Conference Meals

Meals shall not be claimed as a separate item of expense on the reimbursement request when included in the conference activities. If special circumstances exist, for example, a food allergy prohibiting one from eating the meal provided, an exception will be made and reimbursement will be provided for that meal.

Fees charged for attending the official meetings of a convention or seminar where the meeting includes an additional meal cost not included in the registration fee which causes the employee to exceed the daily maximum meal allowance will be reimbursed if supported by a receipt from the event.

Alcoholic beverages are not reimbursable. The meal reimbursement rate shall be paid at the rate for the conference city location.

Section 5 – International Travel

111. General Information

All travel outside the **continental** limits of the United States (Canada, Hawaii, Puerto Rico, and Mexico are outside) must be approved by the JSU President prior to departure. All requests for international travel must be approved by the JSU President at least one (1) month in advance of the departure date. Exceptions for approval less than 30 days will be granted at the JSU President's discretion.

JSU's travel agency will arrange for international travel, including airfare, lodging and vehicle rental services. The agency will also provide information on inoculation requirements and assistance in obtaining passports and visas, when needed. Changes after departure from the continental United States can be made by working with the JSU travel agency.

Note: Travel to Alaska is considered within the continental limits of the United States and meals would be reimbursed at the maximum state reimbursement rate allowed.

112. Currency Exchange for Travel Reimbursement

When converting foreign currency to dollars for the purpose of reimbursement, you must attach proof of the official rate of exchange to the reimbursement request. Any official and documented statement of the official rate of exchange will be acceptable. It is recommended that the traveler obtain a currency conversion upon arrival at their destination so that the rate applicable to the dates of travel is documented.

The rate of exchange from and to U.S. dollars can be obtained from any bank. **This will be the rate of exchange for the specific date(s) given and may vary when the charge is transmitted to the employee's credit card.** If there is a difference between the amount the employee is reimbursed and the amount charged to the credit card, an amended reimbursement request may be submitted to correct the reimbursement.

It is recommended to use a credit card when traveling internationally. The conversions are automatically calculated on the card statement. Use of a card statement overrules any need for further conversion. It is also preferable to pay in local currency when using a credit card internationally. When given the option by an international vendor to pay in US Dollar at the time of the transaction, decline this option. Your credit card company will charge you less than the vendor, and you may avoid hidden fees.

Section 6 – Lodging

113. General Information

Primary responsibility for the reasonableness of amounts charged rests with the budget owner whose funds are being used for travel. “Government rates” (GSA rates) shall be requested and confirmed by all travelers and the JSU Office of Purchasing and Travel at the time reservations are made. Any lodging rates exceeding the maximum daily per diem rate must be approved by the traveler’s immediate supervisor and the JSU Office of Purchasing and Travel.

Commercial lodging other than hotels/motels, such as Airbnb’s, apartments, dormitories, etc., which are licensed businesses regularly offering lodging services to the general public may be used when they result in a lower cost

Reimbursement for all lodging types is based upon actual cost as shown on the itemized receipt, minus unauthorized charges.

Contact JSU’s Office of Purchasing and Travel for all lodging reservations. The department will provide written confirmation of the reservation and rate.

Any changes in travel plans must be communicated to the JSU Office of Purchasing and Travel as soon as possible to avoid incurring hotel cancellation fees. Exceptions may be made for emergencies beyond the employee's control. Cancellation should always be made using the hotel/motel’s policies.

Most hotels require cancellation of room reservations be made at least 72 hours prior to scheduled check-in, otherwise the credit card will be charged for the first night. If the reason for cancellation is business related this charge may be reimbursed.

114. Lodging Shared with Non-JSU Employee

If a member(s) of the JSU employee's family or other non-JSU employee travels with the JSU employee, the employee shall claim reimbursement at the single lodging room rate only.

115. Lodging Shared with JSU Employee

If more than one employee shares a room, each employee may report a pro-rata share of the costs on their travel reimbursement request, or all lodging expenses may be shown on one reimbursement request, provided that both travelers note the sharing of the room on their individual reimbursement requests.

Section 7 - Meal Allowances

JSU employees on official travel shall be reimbursed the cost of meals at the current General Services Administration (GSA) per diem rate for meals.

Meals shall not be claimed as expenses if the meals are included in the conference registration fee.

Meal tips should be included in the actual cost of the meal unless the inclusion of the tips causes the meals to exceed the Department of Finance and Administration's maximum daily meal reimbursement rate. If the daily meal limitations are exceeded, then the tips can be separated and recorded as other expenses. All tips reported in this manner should be totaled for the day and not exceed twenty percent (20%) of the maximum daily meal reimbursement or the actual meal expense, whichever is less.

Meal reimbursements are not allowed within the official duty station. Alcoholic beverages are not reimbursable.

116. Taxable and Non-Taxable Meals

Reimbursement requests require that actual meal expenses be reported separately from lodging and that taxable meals be separated from non-taxable meals. Pursuant to the Internal Revenue Service, any reimbursement of meal expenses for travel not including an overnight stay is considered non-deductible compensation and therefore taxable to the traveler. Entities have the discretion to determine if taxable meal reimbursements will be paid. Certain travelers within an agency may be paid taxable meals, while others are not. JSU does not allow taxable meal reimbursements for travel not including an overnight stay.

If taxable meals will be reimbursed by your employer, employee W-4 forms must be adjusted to take care of additional tax liability, and all employment taxes withheld from the reimbursement matched and properly reported. These payments are reported on the traveler's W-2 as wages.

For more information on taxable meal reimbursement reference Subsection 13.20.30 of the DFA MAAPP Manual.

117. Meal Tips

Meal tips should be included in the actual meal expense unless the inclusion of the tips would cause the meals to exceed the maximum daily limitations placed on meals by the Department of Finance and Administration. If the daily limitation would be exceeded, the employee is allowed to record meal tips for each day under other authorized business expenses. Total meal tips shall not exceed 20% of the maximum daily meal reimbursement claimed.

Travel Tip: Total meal tips shall not exceed 20% of the maximum daily meal reimbursement claimed.

Section 8 - Other Allowable Expenses

118. Phone Charges, Postage, Internet/Wi-Fi and Other Expenses

Phone calls, postage, and other expenses included in the "other authorized expenses" column must be certified by signature at the bottom of the reimbursement request by the employee that they are for valid business expenses. Phone calls itemized on a hotel bill should be circled and indication made if they were for business, or deducted and not claimed if they were personal calls. Calls home are considered personal expenses and are not reimbursable. Calls to the office to check voice mail are reimbursable.

119. Taxi Fares

Fares for taxis or airport transportation services in excess of $10.00 require a receipt which must be attached to the reimbursement request to receive reimbursement.

120. Miscellaneous Charges

A. Baggage Handling

Skycaps: Reasonable charges will be allowed without receipt. Reasonable is usually defined as $1 per bag for each level of handling.

Counter: Charges for baggage at check-in may vary per airline. These charges are allowable and will be reimbursed. Baggage fees are an authorized expense on the JSU travel credit card**. A receipt is required for charges in excess of $10.00.**

B. Hotel/Airport Parking and Tolls

For charges in excess of $10.00/day, receipts must be attached to the reimbursement request.

Travel Tip: Valet parking tips may be reimbursed between $2.00 - $5.00.

Shuttle tips may be reimbursed up to $5.00 per ride and baggage handling may be reimbursed at $1.00 - $2.00/bag.

C. Laundry Charges

One reasonable laundry expense is reimbursable for each seven (7) consecutive days that travelers are required to be away from their official duty station on official JSU business. Laundry charges may not be made once the employee returns home. If the employee will be away from home seven days, a reasonable laundry or cleaning expense will be reimbursed recognizing that it would be difficult to carry more than five (5) days clothing at a time.

Section 9 – Traveling with Students

121. General Information

Experiences that can be gleaned by students while traveling are invaluable to the JSU experience. Sections follow that address policy for undergraduate and post-graduate students.

Reimbursement is based upon actual cost as shown on the itemized receipt, minus unauthorized charges.

122. Travel with Undergraduate and Postgraduate Students

A. Sponsoring Postgraduate Students

This regulation assumes that the postgraduate student is of adult age (at least 18 years old). The postgraduate student works in conjunction with the JSU employee who completes the travel request to arrange logistics of travel. The travel request **MUST** be completed and approved by all signatory parties.

The postgraduate student can embark on travel without a JSU employee to accompany them. The encumbrance to reimburse travel expenditures is set to the student with the JSU employee as the first approver of the reimbursement request.

The postgraduate student is eligible for full mileage reimbursement for use of personal vehicle as they are prohibited from operating JSU fleet vehicles and renting vehicles from state contract.

B. Accompanying Undergraduate Students

Include in your Travel Request a roster of names & J#s, Page 1 of the Student Travel Request Authorization form, and all of their travel reservation details.

Clearly indicate whether or not each student needs a registration purchased on their behalf and, if so, provide information that the Travel Office can use to complete.

A travel advance can be used, payable to the JSU employee traveler, for the students per diem. The employee can choose to distribute the per diem allowance to each student per day or for the entire trip, depending on circumstances.

C. Traveling with Non-JSU Students

Provide a roster of names with each student's school and emergency contact information. Collect indemnifications from each student and submit with travel request.

Clearly indicate whether or not each student needs a registration purchased on their behalf and, if so, provide information that the Travel Office can use to complete.

All proposed Non-JSU student travel must be pre-approved, in writing, by the JSU Division of General Counsel prior to commencement of such travel.

123. Approval Form Requirements

A. Employee Travel Request Form

The travel request form is the standard form used by JSU employees for requesting approval of travel, and is required to be filled out and approved prior to trip expenses, and/or to receive travel advances and reimbursements. The Travel Request Form and its instructions can be found on the JSU website at https://www.jsums.edu/businessfinance/purchasing-and-travel/. Include with this form, as applicable:

- Airfare from State travel agent or 2 quotes from traveler
- Confirmed hotel reservation
- Event/activity information & clarity on whether Travel Office needs to complete event registration (i.e., Conference Registration, etc.)
- Verification (email from JSU Fleet) on whether vehicle was available if traveling by car

B. Blanket Travel Request Form

The blanket travel request form is viable for three months for travel within Mississippi for a single business purpose like recruiting or federal grant activities. All travel costs must be paid via reimbursement to the traveler. Because the blanket request covers an extended period of time and all trips may not be known at the outset, be sure to include enough funds in the Travel Request to avoid having to seek additional approvals midway through the period covered by the Blanket Form.

C. Group Employee Travel Request Form

Multiple JSU employees who are going on the same trip who do not all require reimbursement for out-of-pocket costs can complete one travel request as a traveling group. **<u>This travel must also include students.</u>** A lead traveler named on the request is the only employee eligible for reimbursement. This travel request form alleviates the need for separate forms for JSU employees who will eat with students using a P card and, therefore, will have no reimbursable costs. This form must be requested from the Travel Office.

D. Student Travel Request Authorization (STRA) Form

This form should be completed by the sponsoring JSU employee and routed to Student Affairs for approval alongside each student's emergency contact and indemnification documentation.

Student Affairs will email the fully approved STRA Form to the traveler and the JSU Office of Purchasing and Travel.

E. Reimbursement Request Form

This form should be completed and submitted for approvals within one week of return from the trip. It must be accompanied by:

- Receipts for JSU credit card expenditures (hotel, etc.)
- Receipts greater than $10 for out-of-pocket expenditures
- Conference / event literature
- Receipt from the Business Office showing payback of unused Travel Advance funds
- Per Diem doesn't require receipts BUT report only actual expenditures

Section 11 – Waivers

Per the Department of Finance and Administration, a University shall maintain in its own travel policies and procedures guidelines regarding the waiver process at the University. Each University traveler should follow the University's policies and procedures for waivers. The University should maintain all records of deviations from state travel policy guidelines in its files for auditing purposes.

The purpose of a waiver is to explain why a traveler is deviating from JSU Travel Policy. When requesting a waiver, the explanation for deviating from policy should be included within the expense report in the Comments field (Concur) or a memo attached (paper). This explanation and any supporting documentation are required when:

- Requesting authority to reimburse or approval for rental vehicle with a cost greater than the intermediate size on state contract
- Requesting authority to reimburse or approval for rental vehicle not on current contract
- Requesting authority to reimburse or approval for a hotel other than the conference hotel
- Requesting authority to reimburse or approval for travel arrangements not made through Christopherson Business Travel (It is the use of public carrier that triggers the need for booking through Christopherson Business Travel.)
- Requesting authority to reimburse or approval for travel expenses greater than the least expensive cost comparison for airline tickets
- Requesting authority to reimburse or approval for other specific travel situations outside of policy (explanation required).
- Meal reimbursements at 75% of the applicable per diem rate for **same day travel** (no overnight stay) that exceeds eight (8) hours away from your official duty station.

Section 12 – Employee Adherence

Employee Adherence

All University faculty, staff, and volunteers are expected to comply with all federal and state laws, the Mississippi Institutions of Higher Learning policies and bylaws, and Jackson State University policies, including but not limited to this stated policy to help ensure that the University avoid inappropriate purchases and activity that may be recognized in an audit or as illegal according to applicable laws and regulations.

CERTIFICATE OF APPROVAL / SIGNATURE

Policy Name	Jackson State University Travel Policy	
Administrative Division	Business and Finance	
Approved By:	**Signature**	**Date**
President	[illegible]	12/19/25
General Counsel	[illegible]	12/19/25
VP Business & Finance/CFO	Howard B	12/19/25
Director of Procurement	Kimberly Harris	12/19/25