

INSTITUTIONAL DIRECTIVE 3-2

July 27, 2009

Title: Travel Guidelines and Expense Allowances

I. Purpose

To establish guidelines governing employee travel and procedures for travel reimbursement.

II. Policy

It is the policy of Piedmont Technical College to fund travel expenses for approved employee travel in accordance with the published State of South Carolina Travel Regulations.

III. General

Travel and transportation at State expense will be authorized only when officially justified and by those means which meet State Government requirements consistent with good management practices. A traveler on official business will exercise the same care in incurring expenses and accomplishing an assignment that a prudent person would exercise if traveling on personal business. Excess costs, circuitous routes, delays or luxury accommodations unnecessary or unjustified in the performance of an assignment are not considered acceptable as exercising prudence. Travel by commercial airlines will be accomplished in coach or tourist class, except where exigencies require otherwise. Transportation to and from points of arrival and departure will be accomplished by the most economical method (SEE SECTION IV). The need to exercise strong management and control over travel will continue for the foreseeable future. Limited funds from Federal, State and local sources mandate the need for conscious decisions on the need to travel. To control travel, the following guidelines will be enforced:

- A. All out-of-state travel must be submitted on an Out Of State Trip Request (Attachment 1) and approved by the President prior to the onset of trip. Approvals must accompany requests for reimbursement for travel out-of-state.
- B. School vehicles or rental vehicles will be used for official travel only.
- C. Private vehicles may be used for official travel.
- D. Self service facilities will be used in all instances unless these services are not available.
- E. Approved full-time faculty/personnel with a South Carolina driver's license are the only authorized drivers of college vehicles.
- F. In no case will college or rental vehicles be kept overnight at private residences or used to go to lunch within the Greenwood area.

Office of Responsibility: Vice President of Business & Finance

IV. Out-Of-State Travel Arrangements

- A. Airfare - any out-of-state trip will require that an Out-Of-State Trip Request Form be approved prior to any expenses being incurred by either the individual or the College. Once approval is obtained, the employee will have two options on obtaining an airline ticket for travel. The options are as follows:
 - 1. Travel Agency – the employee may contact any local travel agent to acquire an airline ticket reservation. The employee must obtain a purchase order prior to making the reservation. The College will then pay the travel agency directly for the ticket.
 - 2. An employee may acquire the airline ticket reservation on their own by use of the Internet or through direct contact with the airlines. Any such procurement will be the sole responsibility of the employee. The cost of the airline ticket will be reimbursed to the employee on a Travel Reimbursement Form after the trip has occurred.
- B. Vehicle – an Out-Of-State Trip Request Form must be completed and forwarded to the Vice President of Business and Finance Office with the Vehicle Authorization Request Form (Attachment 2) for approval if a rental vehicle will be required. Once approved, the employee will follow the same procedures as noted in Section V. If the employee chooses to use their personal vehicle for out-of-state travel, the employee will be reimbursed according to the guidelines in Section V.
- C. Other Expenses – all other out-of-state expenses such as meals, hotel, etc. will be reimbursed according to the guidelines in Section V.

V. Basis for Calculating Travel

- A. Food and Lodging Reimbursement - Employees of the State of South Carolina or any agency thereof while traveling on the business of the State shall, upon presentation of a paid receipt, be allowed reimbursement for actual expenses incurred for lodging.
 - 1. The employee shall also be reimbursed at the approved per diem rate for meals which shall not exceed \$25 per day, in state and \$32 per day outside of South Carolina.
 - 2. It shall be the responsibility of the Vice President of the respective division to monitor the charges for lodging which might be claimed by his employees in order to determine that such charges are reasonable, taking into consideration location, purpose of travel, or other extenuating circumstances. State contract lodging facilities will be used whenever possible.
- B. Dependents Accompanying Employee - If a dependent accompanies an employee on an authorized business trip, only those expenses that may be directly attributed to the employee may be reimbursed. Approval by the College President must be obtained prior to any dependent occupancy of a state owned or rented vehicle.
- C. Mileage, Meal and Miscellaneous Reimbursement – When an employee uses his own automobile for official business, he/she shall be reimbursed at the current rate established by the state of South Carolina. Auto travel should be the most direct route practicable and substantial deviation from the distances shown by the current State Highway Map of the South Carolina Highway Department should be explained. When more than one employee is traveling to the same location, the authorized number of automobiles should be limited to not more than one automobile to two people.

1. A separate entry should be made for travel in the vicinity of a community or city. Only actual miles driven on official State business will be charged at the current rate established by the state of South Carolina.
 2. Mileage between the employee's home and his or her place of employment is not subject to reimbursement. However, when an employee leaves on a business trip directly from his or her home, and does not go by the employee's headquarters, the employee shall be eligible for reimbursement for actual mileage beginning at his or her residence.
 3. Reimbursement for overnight travel will be disallowed within a radius of 50 miles of Greenwood. All overnight travel approvals are to be submitted in advance to the appropriate institutional officer.
 4. For one day out of town trips the maximum allowance for lunch is \$7.00. This excludes travel within our seven county region. All one day out of town trips are to be approved by the appropriate supervisor.
 5. Employees required by their agency head, as a part of their official duties, to attend statewide, regional, or district meetings within the area in which the employee is headquartered, may receive reimbursement for the cost of meals served at such meetings. At least 75% of those attending the meeting must be employees of other agencies or outside organizations. Meetings of boards, commissions, and committees are not considered statewide, regional, or district meetings. If the cost of the meal exceeds the state allowance, receipts must be provided in order to receive reimbursement. In the event an agency makes reimbursement to an employee of another agency, the employee's home agency will be notified of the transaction by the agency making the reimbursement.
 6. Parking fees for state-owned and privately owned vehicles are reimbursable upon presentation of a paid receipt. No reimbursement shall be made to operators of state-owned vehicles who must pay fines for moving or non-moving violations. Driver accepts full responsibility for all fees or fines of this nature.
 7. There will be no reimbursement for such expenses as baggage handling, tips for cabs, airport personnel, food service, or any related expense for services rendered to the employee.
 8. Phone charges for personal calls will be allowed at a maximum rate of \$5.00 per day for overnight travel with a receipt denoting each call and charge. Each call will be reimbursed on an actual cost basis. If it is necessary to call Piedmont Technical College, the employee will be reimbursed for the actual cost. A receipt must be presented at the time of reimbursement request.
- D. Automobile Travel When Air Travel Is Most Economical Mode of Travel - The Appropriations Act states that transportation for official State business will be accomplished by the most economical method. Based on this, an employee who elects to drive his car for his convenience when more economical modes of travel are available is entitled to reimbursement for:
1. Mileage equal to the amount of coach or tourist airplane fare.
 2. Vicinity mileage incurred on official business in lieu of using a taxi.
 3. Parking fees equal to that which would have been incurred if the car had been parked at an airport.

4. Subsistence based on the date and times the airline connections should have been made for departure and return. Any period of time exceeding these guidelines would be at the employee's expense and no subsistence could be paid.
- E. Source of Funds - Travel and subsistence expenses, whether paid from State appropriated, Federal, local or other funds will be allowed on the basis of state policy and regulations in effect at that time. Reimbursement will not exceed state allowable limits for mileage, lodging and meals.
- F. Interview Travel Expenses - Travel expenses, within the limitations applicable to State employees, may be paid to any individual being considered for employment by any State government agency if the head of the interviewing agency makes a specific, formal determination in each case: (1) that the signification of the position to be filled is such that it warrants incurring such costs; (2) that such costs would not exceed the expense of conducting the interview at the interviewee's home area or elsewhere; and (3) that qualified candidates residing within South Carolina were considered before candidates from other states were sought.
 1. Request for determination to pay travel expenses will be prepared by the interviewing department and forwarded to the President through the appropriate institutional officer. This approval will be attached to the reimbursement request.
- G. Use of School Vehicles for Travel – (limited vehicles available)
 1. Directors are responsible for insuring that all vehicle use is properly charged to their budgets and that the routine procedures are followed:
 - a. When requesting a college vehicle, contact is made with the Public Safety Department in Building F.
 - b. Vehicle Information Logs may be used to indicate any comments an employee may have about the use of the vehicle, its operation, any problems encountered or any other comments relating to the trip.
 - c. Vehicle Information Logs are collected by the Public Safety Department and a copy turned in to the Finance Office.
 2. Mileage documentation will be submitted to the Accounting Office on a monthly basis. Allocations of vehicle use will be calculated at the current rate established by the state of South Carolina. This institutional rate will be used for posting expenditures to budgets at the end of each month.
 - a. Grants: In negotiating grant budgets with federal officials, grant directors will make a concerted effort to insure that travel money is allocated in their grant budget.
 - b. The same procedures as outlined above will be followed regarding requesting vehicles and using the Vehicle Information Log. Also, grant directors will be responsible for recording all vehicle travel in a log.
 - c. The General Accountant will then charge the appropriate grant travel account based on the travel vouchers submitted by the grant directors at the current rate established by the state of South Carolina.
 3. All budget directors will be able to recap the total expenditures when they receive monthly status reports.

H. Procedures for Rental Vehicles

1. When travel dictates that a rental vehicle be utilized, the employee is to complete the "Request to Rent a Vehicle" form (Attachment 2) from Enterprise Rent-A-Car (available online at www.ptc.edu/forms) and obtain all necessary signatures. The Procurement Officer will be the authorizing person for approval on all forms. If the Procurement Officer is unavailable to approve the form, you may receive approval from the Vice President of Business and Finance. If the employee is traveling out of state, an approved Out of State Travel Form must be submitted with the authorization form before authorization will be granted.
2. The employee will then provide the authorized form to Vice President of Business and Finance Office to fax the completed form to Enterprise Rent-A-Car at fax # (864) 229-4867. The State Contract for vehicle rental is #05-S6784-A11296 and expires January 4, 2010. A copy of the Request to Rent a Vehicle Form and a copy of the employee's driver's license should be faxed to Enterprise for them to release the vehicle. The employee will need to contact Enterprise at least twenty-four (24) hours prior to the employee's departure time. This will allow Enterprise sufficient time to complete all the necessary paperwork and deliver the car to the Lex Walters Campus.
3. All vehicles will be delivered to the designated parking area in the front of the L-Building on the Lex Walters Campus. Enterprise will leave the rental vehicle keys and their agreement with the Public Safety Department. Once the vehicle is delivered, the Public Safety Officer on duty will sign the Vehicle Rental Agreement for Enterprise and take possession of the keys. The employee will need to contact the Public Safety Department who will issue the keys to the employee. The employee will also be issued a gas card, from Vice President of Business and Finance Office, for their trip. **Each vehicle is delivered with a full tank gas and should be returned with a full tank of gas. The gasoline for the rental vehicle will need to be replaced before the vehicle is returned to the College or Enterprise will charge the college for the replacement of the gasoline used.**
4. All emergency information including insurance information is located in the glove compartment of each vehicle. If a problem arises, please consult this documentation and follow all instructions designated by Enterprise.
5. Upon arrival back at the College, employee will need to leave the keys, the gas card and the gas card receipt with the Public Safety Department. The employee **will be required to complete a gas reconciliation form with the index/account number, and attach all receipts to the form. The form should be forwarded to** Vice President of Business and Finance Office. Enterprise will retrieve their vehicle. The account holder will be charged for usage of the vehicle at the rates indicated in the contract and the amount of the gas purchased. If a vehicle is requested and not used, the requesting department will still be charged for the vehicle. We will be billed from Enterprise based on what was requested and delivered. If they deliver the vehicle, the charge will be generated. Please keep this in mind when canceling a trip.

VI. **Procedures for Travel Reimbursement**

- A. Reimbursement requests for travel will be submitted on the Travel Expense Voucher (Attachment 3) through approval channels to the Finance Office.

**Note: Travel Support Documents are to be obtained from the website:
www.ptc.edu/forms/.**

- B. Each item of expense incurred while traveling for business purposes must be properly receipted and attached to the reimbursement request. A copy of the agenda or schedule must be attached to the Travel Support Document.
- C. The Finance Office will review each reimbursement request for adherence to State and college policy and verify the accuracy of the reimbursement calculations.
- D. The Vice President of Business and Finance will validate the travel reimbursement and institute procedures to insure prompt payment.

VII. Driver Reported Malfunctions

Responsive corrective action will be taken on all vehicle malfunctions/breakdowns or problems reported by operators. Each employee authorized to operate a college vehicle has the responsibility to report noted deficiencies to the Maintenance Superintendent immediately after completion of their use of the vehicle.

VIII. Requesting Assigned Vehicle

Employees will pick up keys from the Public Safety Department located in F Building, Ext. 8000. Local use of vehicles requires 24 hours notification for verification from the Public Safety Department.

Original on File 7/27/09
Approved for Publication Date

OUT OF STATE TRIP REQUEST

REQUESTOR(S) _____

POSITION/TITLE _____

DESTINATION _____

TO ATTEND _____

DATE/TIME AWAY _____

REASON FOR PARTICIPATION _____

ANTICIPATED COST	_____
SOURCE OF FUNDING	(Include Reservation/Registration Fee-Hotel-Meals-Transp. Costs) LOCAL () FEDERAL () OTHER (_____)
BANNER INDEX NUMBER(S)	_____

TRANSPORTATION REQUIREMENTS _____

ADDITIONAL COMMENTS _____

SIGNATURE	_____	DATE	_____
	Requestor(s)		
	_____	DATE	_____
	Department Head		
	_____	DATE	_____
ROUTE TO FOR APPROVAL	_____	DATE	_____
	Division Dean		
	_____	DATE	_____
	Vice President		
	_____	DATE	_____
	President		

Form 500

Note: Return original approved form to **Finance Office**. A copy of the approved request must be submitted with requisitions or check requests to the Purchasing Office and a copy must also be attached to Travel Reimbursements requests.



Request to Rent a Vehicle

*Today's Date _____

*Name of Driver _____

*Telephone _____ Fax _____

*E-mail address _____

Agency Piedmont Technical College (864) 941-8314

Type of Vehicle Requested (See Car Classes on website)

*First Choice _____

*Second Choice _____

*Pickup Date (Monday – Friday) _____

*Pickup Time (8:00 am – 5:00 pm) _____

*Return Date _____

*Return Time _____

Special Instructions _____

**Driver's license copy must be included with request
And faxed to Enterprise at 229-486**

<u>For Piedmont Technical College Use</u>	
Note: Obtain approvals before contacting Enterprise	
*Employee Requesting Vehicle _____	
*Destination _____	
*Purpose of Travel _____	
*Index(es) to be Charged _____	
*Employee Signature _____	Date _____
*Dean or Department head Signature _____	Date _____
Procurement Office Approval Signature _____	Date _____
Gas Card Authorized _____ Yes _____ No	

STATE OF SOUTH CAROLINA
Piedmont Technical College
Travel Support Document

Name _____ **PTC ID** _____ **Date** _____
Residence _____
Department _____ **Division** _____ **Banner Index** _____ **Account** _____

\$0.505 = **Mileage Reimbursement Rate** **PURPOSE OF TRIP** _____
Private Auto **Approved** **Not Approved** **Available Budget** _____

** Meals & Subsistence are reportable as income if there was no overnight stay involved	**Reportable In or Out of State				7532								
	Non-Reportable – In State		1		7524	7515	7513	7510	7520	7518	7528		
	Non-Reportable – Out of State		2		7564	7552	7548	7540	7560	7556	7568		

Date Mo - Day	Dep Arr	Time	Destination of Travel			Auto		Meals	Lodging	Air	Other	Misc Tvl	Regist	Total
			Departure	Destination	Return	O	Miles							
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -
							1	0	\$0.00					\$ -

I hereby certify or affirm that the above expenses were actually incurred by me as necessary traveling expenses in the performance of my official duties; any meals or lodging included in a conference or convention registration fee have been deducted from this travel claim, and that this claim is true and correct in every material matter and conforms with the requirements of state laws, rules and regulations.	1	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	2	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Signature _____ **Date** _____

Dean, Dept. Head or Administrator Signature and Date. VP Business Affairs Signature and Date.

Receipts must be submitted for all reimbursable expenses except meals. No Tips are reimbursable.

Mileage is paid for travel by private auto at the rate of forty-four and a half cents per mile.

All out-of-state travel must be approved by college President in advance of the travel.

Approvals must accompany requests for reimbursement for travel out-of-state.

Employees traveling to formal meetings, conferences, or workshops, will submit an agenda with the travel voucher.

Forward two copies of the completed form to the Finance Office.

** Meals & Subsistence are reportable as income if there was no overnight stay involved			**Reportable In or Out of State		5100								
			Non-Reportable -- In State	1	5040	5010	5020	5030	5050	5060	5070		
			Non-Reportable -- Out of State	2	5140	5110	5120	5130	5150	5160	5170		
Date	Dep	Time	Destination of Travel	I	Auto	Auto							
Mo - Day	Arr		Departure Destination Return	O	Miles	Amount	Meals	Lodging	Air	Other	Misc Tvl	Regist	Total
08/09/01	D	8:00	Piedmont Tech	1		\$0.00							\$ -
	A	10:00	Columbia, SC	1		\$0.00							\$ -
08/09/01	D	4:00	Columbia, SC	1		\$0.00							\$ -
	A	6:00	Piedmont Tech.	1		\$0.00							\$ -

Rates of Reimbursement for Meals

In-State	Out-of-State
Breakfast - \$ 6.00	Breakfast - \$ 7.00
Lunch - 7.00	Lunch - 9.00
Dinner - 12.00	Dinner - 16.00