



KEAN

TRAVEL MANUAL

2021-2022



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Travel Checklist & Instructions

- Kean University policy requires all travel to be pre-approved (5 weeks prior) to travel.
- Please see manual for detailed information
<https://www.kean.edu/offices/human-resources/travel-manual>
- No travel permitted without an approved Travel Authorization Form completed prior to travel.
- Reimbursement will not be permitted without an approved Blanket Travel number (BT).

1. Travel Authorization Form + Ethics Compliance Form

These forms must be completed and approved prior to travel date. Once the form is approved and BT number assigned the travelers will be reimbursed for travel. Please follow the travel flow chart for more information.

The following information is necessary to complete the Travel Authorization request.

- Travel Information** - Name & Purpose of Travel, Destination, Departure & Return Date
- Type of Travel** - University Related, Active Participation, Presenting, Professional Development, Insurance Purposes
- Attending** - Training, Seminar, Convention, Conference, Workshop, Research, Presentations
- Funding Source** - Cost Center number from funding source
- Estimate of Total Charges** - Airfare, Lodging, Ground Transportation, Registration Fees and other Business related fees (Pre-payment for any vendor will need vendor name, address & W-9 form)
- Certification** - Automobile insurance information when utilizing own vehicle
- Outside Source funding trip** - Information for sponsored to complete Ethics form

2. *Faculty ONLY please complete the Travel Support Application Form and the Request for Approval for Attendance at Event Form*

- Travel Check off List

3. Grant Funded Form + Travel Authorization Form + Ethics Compliance Form

Grant funded travel is administered through ORSP. All 3 forms must be completed and approved prior to travel date. For more information visit ORSP
<https://www.kean.edu/offices/research-and-sponsored-programs>

4. Travel Expense Form

The Expense Reimbursement Form is required to process a reimbursement. Once the trip is completed please attach original receipts and BT number to the form. **The reimbursement deadline is 45 days after end of travel.**

The following information is necessary to process the Travel Reimbursement Form.

- Travel Information - Payee Name & Address, Cost Center paying for trip, - BT # assigned
 - Charges Incurred - Cannot exceed estimated approve amount, must deduct any pre-payment checks made to vendors
 - Approval - Supervisor approval
 - Original Receipts Requirement
 - Airfare: Original Reservation + boarding pass
 - Lodging: Original receipts
 - Ground Transportation: taxi, tolls, parking = original receipts
 - Registration Fees
 - Other expenses
 - **Example of receipts: credit card statement, e-z pass statements, original receipt from vendor*
 - Authorized Reimbursement Rates
 - Transportation – University business private automobile
.58 cents per mile (**no receipts required**)
 - Tolls (original receipts required)
 - Meals
- Breakfast \$ 8.00 Lunch \$ 8.00 Dinner \$ 20.00 Total per day \$36 no receipt required

Note

** If reimbursement charges are higher than approve amount please submit memo to Sr. Vice President Andrew Brannen with explanation for consideration and include a copy for your original Request for Travel Authorization. Forward travel expense voucher + original receipts to Accounts Payable in the Administration Building, 1st floor for reimbursement.

KEAN UNIVERSITY

UNIVERSITY TRAVEL PROCEDURES

Procedure Administrator: Sr. VP for Finance

Effective Date: September 10, 2007

Revised Date(s) (update) August, 2019; **Jun 2021**

GENERAL GUIDELINES

Introduction:

Official, Faculty/Staff employees traveling on official University business are expected to exercise the same care in incurring expenses that they would if traveling on personal business at their own expense. Excessive and unnecessary travel and other expenses will not be approved or reimbursed.

These policies, procedures and regulations apply to all employees and other persons who are expressly authorized, regardless of fund source to travel on behalf of Kean University in accordance with N.J.S.A.18Z:64-1 et seq.

The electronic version of this handbook is available on Kean University's web page.

<https://www.kean.edu/offices/human-resources/travel-manual>

Purpose

- To provide guidelines relating to the expenditures of Institutional funds on travel regardless of source. The University encourages its employees to engage in a variety of scholarly and learning experiences through attendance at meetings, seminars, and training programs designed to meet the goals and objectives of the University.

Policies

- Use the most economical modes of travel, including discount fares and special rates fares.
- All requests for travel reimbursement for presentations, conferences, conventions, off-campus staff training and seminars must be pre-approved by the Dean, Department Chair/Executive Director, Academic Dean, Division Vice President, Sr. Vice President for Finance and the Ethics Liaison Officer
- Submit Request for Travel, along with Ethics form three **(3) weeks prior to departure date**
- All travel outside the 48 contiguous U.S states must be approved by the President of the University
- Submission of travel paperwork does not guarantee approval
- Travel request involving buses will require additional request time
- Individuals traveling to the same event must submit all travel paperwork as one complete packet

- Prior to traveling complete a Travel Authorization Request Form, once Blanket Travel Number (BT#) is assigned you will receive an email response. You can verify how much you were approved for by entering the BT number in Ellucian (BINQ).
- Faculty are required to complete additional forms along with the Travel Authorization Form
- Compliance with State and Federal Laws and Regulations including the NJ Conflicts of Interest Law and other State ethics laws and regulations

Failure to receive the required approvals before the travel date may result in financial liability and legal risk for the employee due to unauthorized travel under University policies, procedures and regulations.

CATEGORY

Faculty traveling under any of the following categories you must include the Travel Support Application and Faculty please accommodate for class coverage.

University-Initiated Travel

Travel is required by the academic unit, college or Division of Academic Affairs. i.e. accreditation certification, curricular, partnership development, or as deemed necessary.

Active Participation/Professional Presentation

- Travel to make a presentation that is not considered in the field of research/scholarly presentation, e.g., offering perspectives, discussing issues, sharing experiences, etc.
- Chair a panel
- Moderate a session
- Serve on an executive committee, etc.

Research/Scholarship/Creative Presentation

- This category consist of original contributions to the field, which fits within the academic discipline's definition of what constitutes research, scholarship or creative works.
- Presentation/performances is to be at peer-reviewed venues and at a level that could lead to peer-reviewed publications.

Assessment/Accreditation Purposes

- Supporting documentation showing participation/attendance is a requirement and or programs citing travel for training/educational purposes must be included in statement.

Insurance Coverage

- Conducting official business during working hours off campus must complete a Travel Authorization Request Form and Ethics Form approved prior to travel.

TYPES OF TRAVEL

1. Training, Seminars, Workshops & Virtual

- Upon completion of the training, the employee will receive satisfactory completion, certification in proficiency, CPE credits or other certificates.

2. Conventions and Conferences

- General programs, sponsored by professional associations on a regular basis, which address subject of particular interest in the development of new skills and knowledge in a particular **field related to State government operations.**

3. Regular University Business- Mileage

- Constitutes all official business travel that is directly a part of an employee's normal job responsibilities. i.e., recruiting or performing outside field work with in the specifications of their job description. (no Travel Authorization Request Form required)
- Employee will enter a requisition into Ellucian, and the University Procurement and Business Services Department will assign a purchase order number. If employees are being reimbursed for mileage, a requisition for the fiscal year should be entered with an estimate of the amount to be reimbursed. A blanket purchase order (BPO) will be assigned, and an Ethics Compliance Form is still required and should be sent to the Ethics Liaison Officer for approval prior to the travel date.

NOTE: All air travel is currently suspended until further notice.

FUNDING SOURCES AND APPROVALS FOR TRAVEL

- There are two categories of **faculty travel**:
 - 1. Professional development:**
 - a. Relevant and significant scholastic paper presentations, as determined by the Dean, the maximum shall be **\$1,000**
 - 2. Active participation** as deemed relevant by the Dean, the maximum shall be **\$500**
 - a. Faculty members traveling while they are scheduled to teach may not miss the equivalent of more than one day of classes per trip and must arrange travel schedules accordingly. (exceptions must be approved by Provost/VPAA)

1. Funding Limitations

- Travel reimbursement is limited to \$1,000 with the exception of external grant-funded travel.

2. University/Department funded

- Deans/Department Chairs/Executive Directors are responsible for the travel funds with their perspective departments.

3. External Grant Funded

- Grant Funded Travel form is required and Grant Officer approval to establish the anticipated travel cost allowable for reimbursement in accordance with the grant/contract terms.

4. Outside Source Funded

- Any type of travel sponsored by a private organization Request for Travel and Ethics Forms required

5. Personal Funds

- Traveling on official University business during regular hours using personal funds are required to complete a Travel Authorization Request Form and incur all out of pocket expenses

TRAVEL METHODS

- Travel using railroads, airlines, buses, taxicabs, rental cars and other usual means of transportation

Routing of Travel

- All travel shall be by the most direct, economical and usually traveled route
- If person travels by an indirect route of their own personal convenience, the extra expense shall be borne by the individual

Air, Rail, and Hotel Accommodations

- In agreement with Direct Travel/Concur for ALL university related business travel, air, rail, and hotel accommodations. This online tool enables the user to book travel related expenses once a BT# has been assigned. NO reservation eligible for reimbursement will be made without a valid BT#. Step-by-step instructions will follow once your BT# is issued via email, or you may contact

Procurement and Business Services for additional information, questions, or concerns @ x75054 or 908-737-5054.

- Contact information for Direct Travel is:
1-866-492-9840 or email at keantravel@dt.com (available 24/7)
 - **NOTE:** You may use your own credit card for University travel purchases, however, to be considered for reimbursement, you must provide the BT# when submitting original receipts and passenger coupon.
- Direct Travel/Concur allows the user to use their personal credit card when booking personal travel arrangements.

Ground Travel Options

- To/From airports shall be confine to the lowest cost modes of transportation available. Lyft and UBER are acceptable. SUV/Limousine, etc. are not acceptable.
- Car rentals authorized when absolutely necessary with prior approval

Field Trips

- **Kean Students** – Academic field trips may include but not limited to, curriculum related activities, conferences, research and academic related events.
- **External Students** – Any activity in which a student from outside of the university is being put onto a Kean university funded busing will require a Kean University Faculty or full-time staff member in attendance. Groups or departments sponsoring students are responsible for obtaining copies of proper release forms for students.
- All students traveling via bus or van for Kean sanctioned activity must submit all proper paperwork for field trip prior to booking or securing a bus.
- Programs requesting a bus or van paid through Procurement and Business Services require additional time for processing.
- *Students are **NOT permitted** to travel with any Faculty or Staff in their personal vehicles.*

Transportation by Personal Vehicle (mileage)

- Mileage in lieu of all actual expenses of transportation is allowed when using their own automobile on official business. The allowable mileage rate is currently .58 cents per mile. Parking/toll charges are allowed.

- When using your own personal auto for official business the employee’s auto insurance is primary. The State’s auto liability in secondary or excess of the employee’s auto insurance. The State does not cover any physical damage to an employee’s auto, nor will it reimburse collision or comprehensive deductibles.

OFFICIAL STATION

Is defined by University regulations to which the employee is regularly assigned. For University employees the Kean University, Union Campus is the official station.

Guidelines

- Mileage expense must be pre-approved and from Kean (official station) to the destination and return back to Kean. *i.e. when leaving from home, the normal daily commute to Kean is deducted from the overall mileage calculate.*
- If an employee travels from the University to another assignment, they will be reimbursed for the mileage from the University to the temporary assignment. However, it must be stated on the Travel Reimbursement Form that the employee left from Kean University.
- Travel on a non-scheduled workday/holiday to anywhere other than the official station is reimbursable from the employee’s home with prior authorization.
- Temporary assigned to another area, or is on daily travel on University business and leaves from home you will be reimbursed from the difference between home to the current assignment. The notation ‘HOME STATION’ should be noted next to date of each trip.

Example:

Employee lives in Rahway, NJ approximately 10 miles south of Kean University and is traveling to Trenton approximately 40 miles south of Rahway.

Official Station	Kean University
Normal Travel from home to University	10 miles each way, round trip 20
Rahway to Trenton and return to Rahway total miles	100
Normal Commute	20
Reimbursable Mileage	80

MEAL ALLOWANCE

Guidelines

- Trips that do not involve overnight lodging will be reimbursed for only allowable transportation costs

Per-Diem Meal Allowances Limited to

- Trips in excess of 24 hour periods requiring overnight lodging the allowable per diem reimbursement is limited to actual reasonable expenditures. No receipts required for any meals. Maximum allowable reimbursement for meals:

Breakfast - \$8.00, Lunch - \$8.00, Dinner - \$20.00, TOTAL \$ 36.00 per day

Exceptions

- In any case in which the total per diem reimbursement exceeds the current allowable rate, prior approval required.

Official Luncheon/Dinner

- Reimbursement is approved for the cost of an official luncheon/dinner which an employee is authorized by Dean/Department head to attend related University business will be reimbursed the cost of the employee's lunch/dinner. An Ethic Form is required for approval prior to event.

REIMBURSEABLE EXPENSES

- Travel expenses to those which are essential to transacting official business.
- Tips, gratuities and similar fees, other than for meals, are permitted, provided that amounts paid are within normally acknowledged standards.

NON-REIMBURSEABLE EXPENSES

- Any expense not referenced as allowable is not reimbursable
- Alcoholic beverages, personal items, meals for one day trip, laundry, entertainment, repairs, passports, time share, cancellation and flight change fees for non-business/emergency situations
- Sales tax

CELL PHONE POLICY

Usage of a Kean University issued cellular device for international travel can check the following under policies and procedures outlined by OCIS.

DOCUMENTATION REQUIREMENTS FOR REIMBURSEMENT

Guidelines

- Submit Travel Reimbursement Form to Accounts Payable within 45 days of event/trip
- All necessary receipts attached to the Travel Reimbursement Form, employee signature and supervisor responsible to approve for processing.
- Recurring University Business Travel person(s) at the beginning of each fiscal year, enter a requisition for a blanket purchase order (BPO) with an estimate of the reimbursement amount for the year. Travel on a regular basis as part of your position's requirements, should submit for reimbursement no later than 30 days from the end of each semester.

Pre-Payment Check Request

- Allows direct payment to the vendor before the event
- Attach confirmation or reservation to the form and include along with your Travel Authorization Request form in order to process the travel request as soon as a BT number is assigned.

PART-TIME/ACADEMIC SPECIALISTS

- Subject to all guidelines and full time employees

ATHLETIC/TEAM TRAVEL

- All accommodations or anticipated arrangements required should be made through Direct Travel/Concur based on the projected date(s) of the schedule of games is established.

TRAVEL REIMBURSEMENT FOR NON-EMPLOYEES

Prospective Employee

- Invited for Faculty, Dean or Cabinet-level position interviews are eligible for reimbursement for travel expenses. Approval to invite a prospective professional employee may be authorized by Senior/VP or Provost/VP Academic Affairs.

Approval

- Each college is assigned a BT number for the fiscal year. The candidate must pay out of pocket expenses and submit all original receipts for reimbursement consideration. Signed by Department Chair/Dean/Provost/VP Academic Affairs and SVPF.

Reimbursement

- Prospective employee submits all original receipts and travel form including name, social security number, and address. Each college has an assigned BT#.

STUDENT TRAVEL

Student *Travelearn* and Study Abroad Programs

- All University students participating in *Travelearn* and Study Abroad Programs shall pay for all of their travel expenses. These programs are administered by the Center for International Studies.

Other Student Travel

Student Group Travel

- One (1) Completed Travel Authorization Request and Travel-Prepayment Check Request, attached with a name list of students. All submitted 5 weeks prior for approval.
- Blanket Student Travel (BST) will be issued
- Students traveling with Faculty members will need to follow the same procedures as employees.

International Student Travel

- All faculty traveling with students internationally must check-in with the Center for International Studies prior to completing full travel paperwork.
- Applications are due 2 months in advance for international travel with students for research, and or exchanges.
- Faculty traveling with students for research project must submit a full outline of the research project with their applications.
- *Travelearn* Applications are to follow the time-line set forth by the Center of International Studies.
- International travel paperwork policies (*Travelearn*, GMBA, and Global Business) questions should be direct to the Center of International Studies.
- Faculty/Staff traveling should familiarize and follow the Emergency Management Plan should any emergencies occur while traveling.

Questions contact the Center for International studies

<https://www.kean.edu/offices/university-police/emergency-management>