The Central University Libraries will recognize four different categories of travel: professional, assigned, local, and other. Each type of travel is defined below, accompanied by a summary of the reimbursed offered for it. Assignment of an individual’s travel to a category of travel is at the discretion of the Dean of Central University Libraries. For purposes of this policy the Dean’s designee for all travel matters is the CUL Assistant Dean for Human Resources, and all forms should be submitted to the CUL HR Office. Reimbursement for travel can change at any time depending on the availability of travel funds.

This policy is generally intended to comply with IRS rules and regulations and the travel policy for Southern Methodist University. In some instances, however, this policy may allow payments or reimbursements that require the University to report taxable income to an employee on a case-by-case basis.

**Professional Travel**

Professional travel makes up most travel by the Central University Libraries staff. It commonly includes travel to conferences, meetings, workshops, and other educational opportunities. It includes most travel meant to improve staff in their profession and travel that enables staff to contribute to their profession. Like all travel, professional travel must have the pre-approval of appropriate supervisors and the Assistant Dean of Human Resources. To be reimbursed for travel to a conference, one must ordinarily be a member of the sponsoring association.

**Reimbursement for professional travel:**

- Lodging and Meals will be reimbursed up to the greater of:
  - $185 per day (receipts required) OR
  - GSA per diem rates [www.gsa.gov](http://www.gsa.gov) (receipts required)

Please note: gratuities should not exceed 20%, and amounts exceeding that limit will not be reimbursed.

- Air fare: 100% up to $350; 50% thereafter [receipts required]
- Ground transportation: 100% up to $100 per trip; 50% thereafter [receipts required]

**Registration Fees:** 100% [receipts required]
Lodging and meals can be combined up to the maximum allowable rate.

Please see Local Travel section for rules on same day travel.

**Assigned Travel**

When the Dean of Central University Libraries requires representation at a meeting, she will assign someone to represent her. Assigned travel also can take place to certain workshops and other events where the CUL derives a direct benefit from the participant’s attendance. A third type of assigned travel relates to fundraising efforts, to solicit or pick up donations and gifts, or to select or sell special collections. Designation of travel as assigned travel is always at the discretion of the Dean, after consultation with the supervisor when applicable.

**Reimbursement for assigned travel:**

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>100%</td>
<td>[receipts required]</td>
</tr>
<tr>
<td>Meals</td>
<td>100%</td>
<td>[receipts required]</td>
</tr>
<tr>
<td>Transportation</td>
<td>100%</td>
<td>[receipts required]</td>
</tr>
<tr>
<td>Registration Fees</td>
<td>100%</td>
<td>[receipts required]</td>
</tr>
</tbody>
</table>

**Local Travel**

Mileage to local professional conferences, workshops, or meetings may be covered at the SMU approved reimbursement rate at the time of travel. In accordance to SMU policy: *meals purchased on same day travel which does not require an overnight stay will not be reimbursed unless the time away (from both home and office) is longer than 12 hours*. Meals for same day travel exceeding 12 hours may be reimbursed if the travelers are away from home/office on business during the entire meal time, but must be reported to the Payroll Department to be added as taxable income to the traveler. CUL Director of Finance and Special Projects is responsible for reporting the reimbursement to the University’s Tax Department for appropriate treatment. Travel from home will be reimbursed at no more than the excess of mileage to and from the destination and round trip mileage between home and the University. Registration fees to approved meetings and workshops normally will be paid at 100% of costs. Like all travel, local travel must have the pre-approval of immediate supervisors and the Dean Designee.

**Other Travel**

Occasionally CUL staff will engage in travel that does not qualify for reimbursement but still can qualify for paid leave. In such cases the traveler should fill out the “Request for Professional Leave, Central University Libraries” form that accompanies all travel requests, but not SMU’s “Travel Report.” Like all travel, unreimbursed travel must have the pre-approval of immediate supervisors and the Assistant Dean for Human Resources.
**Travel Forms and Documentation**

Prior to travel, both the “Request for Professional Leave, Central University Libraries” form https://sites.smu.edu/cul/staffresources/travel/travreq.pdf and the “Travel Authorization Section” of SMU’s eTravel Report http://smu.edu/controller/dept_ap/ must be completed and signed. The “Travel Report” and “Request for Professional Leave” are submitted to the traveler’s Director (if applicable), divisional Assistant Dean, and the Assistant Dean for Human Resources for appropriate signatures. The “Travel Report” will be signed by the Assistant Dean for Human Resources and returned to the traveling staff member.

Upon return from travel, go to the Controller’s website http://smu.edu/controller/dept_ap/ to enter data into the Expense Report Section of the “Travel Report.” Print out the new form (with expenses entered), sign, and return to the CUL HR Office within ten days of completion of travel. Include all receipts taped on all sides to 8 ½ x 11 paper. In addition, the CUL Professional Conference/Workshop Report https://sites.smu.edu/cul/staffresources/travel/CULProfessionalConferenceReport.docx must be submitted with the completed Travel Report. The conference report should be thorough enough to present learning outcomes from the conference, so generally about a page or so in length. Both forms are required for reimbursement. Instructions on completing the SMU Travel Report can be found at https://sites.smu.edu/cul/staffresources/travel/TravelReportInstructions.pdf.

For local, non-reimbursable travel, only the “Request for Professional Leave” is required. The official SMU Travel Report is only needed for reimbursable expenses.

**International Travel and/or Exceptionally Expensive Conferences**

International travel is not ordinarily supported by the Central University Libraries and must be approved by the Dean of Central University Libraries. If it is funded, it may be funded at a lower percentage than other travel. SMU policy requires pre-authorization and additional procedures prior to international travel. Information is available at the Risk Management website: http://www.smu.edu/BusinessFinance/PoliceAndRiskManagement/RiskManagement/InternationalTravelRequirements. Also, the Dean reserves the right to fund exceptionally expensive workshops and conferences at less than the percentages ordinarily paid.

**Commercial Travel**

With a few exceptions, travel should be at the lowest possible fare. Travelers are encouraged to make reservations in advance to take advantage of savings for advance purchases, with the
understanding that should the traveler becomes ill or unable to make the planned trip CUL will reimburse the employee for prepaid travel expenses. Staff are also encouraged to take advantage of savings by using Colwick Travel, allowing a greater flexibility for changes. If through personal preference or through unnecessarily late travel arrangements, a traveler incurs significantly higher costs for air travel than would have been possible, CUL reserves the right to lower the rate of reimbursement for that travel.

**Personal Vehicles**

If a traveler chooses to use a personal vehicle in place of commercial travel, the mileage cost for the personal vehicle must be no more than the lowest commercial costs for equivalent travel. CUL will reimburse documented travel mileage at the rate approved by the Internal Revenue Service. Proof of mileage should be provided by printing out mileage from MapQuest (or other map sites such as Google, etc.) and attaching to the Travel Report.

**Rental Vehicles**

Cars may be rented by travelers only when alternatives such as taxi cabs or airport buses are unavailable, more costly or impractical. Rentals should be made through the University’s designated travel agency or at similar discounted rates.

**Special Arrangements**

On occasion travelers can save the University money by arranging free or significantly reduced lodging for themselves or by staying an extra day to affect significant savings on an airline ticket. Travelers who arrange such lodging may be reimbursed more fully in an area where they normally would receive only partial reimbursement. Travelers who stay an extra day for significant savings in air travel may receive travel reimbursement for that extra day. The CUL Assistant Dean for Human Resources will handle these and other exceptional circumstances on a case-by-case basis.

**Texas Travel and Lodging**

Southern Methodist University is exempt from the State of Texas hotel occupancy and sales taxes. The Texas Sales Tax Exemption Certificate for SMU can be found in the CUL Human Resources office and on the SMU Controller’s website: [http://smu.edu/controller/restricted/download/forms/Tax_Exempt.pdf](http://smu.edu/controller/restricted/download/forms/Tax_Exempt.pdf). Travelers must use this certificate when they register at any hotel or motel in Texas; we cannot reimburse travelers for a tax that they paid unnecessarily.
Personal Expenses

In accordance to SMU policy: Personal telephone calls and faxes and other electronic communications, laundry, valet expenses, movies, bar tabs and alcoholic beverages not consumed with regular meals, snacks in addition to regular meals, flight insurance, insurance on rental vehicles (except in foreign countries where travelers must always accept additional rental car insurance), excursions and charges for recreational activities will not be reimbursed. The cost of meals, when the meal is included in the conference cost will not be reimbursed, unless bona fide University business requires the employee to miss a convention meal.

Limits on Individual Annual Travel

Staff members are restricted to one professional development opportunity per fiscal year. Additional Assigned or Professional Travel may be approved as specific needs dictate.

Ex Libris User Group Meetings

Reimbursement for Ex Libris User Group meetings is determined each year. It does not precisely follow either Assigned Travel or Professional Travel guidelines. Travel to this meeting does not necessarily count against the individual limits in the “Limits on Individual Travel” section.

Travel Expenses Funded by Grants and Contracts

Please see SMU policy 3.7, section L for rules specific to Grants and Contracts.

Special Financial Circumstances

Library or University policies may change without notice in the event of adverse financial circumstances. In such cases, reimbursement for travel may be reduced below the levels in this policy or eliminated entirely.