Employee Business Travel Guidelines

This document covers many frequently asked questions regarding travel to manufacturer training courses or professional conferences. It is not an official policy, but it is intended as a guide to help you plan your trip more easily.

General Responsibilities

When you travel it is the department's responsibility to register you for a course or conference. It is your responsibility to make the arrangements to get there and back. This includes booking a hotel room, reserving a flight, and, if needed, renting a car or making other local travel plans. However, your arrangements are subject to your supervisor's approval, and you should talk with him/her before you confirm any plans.

Official Policy

The official last word on business-related travel is Partners' **Policy and Procedures for Employee Business Expenses.** This document is updated frequently; the most recent copy is available at: http://is.partners.org/finance/travelcentral.html → Employee Business Expense Policy.

Expense Payment and Reimbursement

The department does not have a corporate credit card and cannot give cash advances to cover any expenses. The general expectation is that you will pay for your hotel, local travel and food expenses with a personal credit card – usually you do not have to pay for the flight yourself (see below). Once you return you will fill out an expense report, and after it is approved you will receive a reimbursement check from Partners. **You should save ALL receipts and invoices to ensure that your are properly reimbursed.** Also, if you are traveling with another employee you should each pay for your own expenses as much as possible – this makes the reimbursement process go more smoothly.

Travel Central and Expedia Corporate Travel

Partners recently selected Egencia (formerly Expedia Corporate Travel) as its partners for travel services and launched **Travel Central** (http://is.partners.org/finance/travelcentral.html), an internal website dedicated to employee travel needs. In general, all hotel, flight and rental car arrangements should be made through the Egencia website. (Directions on how to register with ExpediaCorporate.com can be found on the Travel Central page.) Flights can be billed directly to the department; however, hotel and rental car expenses must be covered by your personal credit card, to be reimbursed upon your return.

Expense Amounts

The number below are estimates of how much you should plan on covering up front, to be reimbursed:

Travel to and from airport	$100
Car rental/local travel	$300
Hotel	$100-200 per day
Food*	$115 per day

* Partners limits daily food expenses to (1) a reasonable amount for breakfast (max $20 per PeopleSoft), (2) $30 for lunch and (3) $65 for dinner.

Reimbursable vs. Non-Reimbursable Expenses

The Partners policy goes into great detail on what is and isn't reimbursable. In general, transportation, food (but not alcohol) and lodging are the extent of what is reimbursable. For example, if you buy toiletries or a tee shirt at the airport, those are not reimbursable expenses. Also note that the Partners policy has limits on how much you can spend on food each day. Some other specific items that people have asked about:

Phone This is covered in Section III-C of the Partners Policy (Lodging, Incidental Items & Telehpone Calls). In general, you can make phone calls to arrange transportation and make reservations, and to stay in reasonable contact with your family.

Laundry Also covered in Section III-C. Per the July 2006 policy revision you can be reimbursed for reasonable laundry expenses if the trip is longer than five business days.

Internet The PHS policy does not address in-room Internet access, but according to the PHS Finance department you can be reimbursed for this expense as long as you use it for business purposes.

Hotels

Some manufacturers and events offer packages that allow the department to pay for your hotel stay at the same time it pays for the course registration. We will take advantage of this whenever possible to reduce your up-front expenses, but it ultimately depends on the event and the location.

Similarly, some manufacturers offer to make reservations on your behalf at a hotel they deal with frequently, which can make trip planning much easier. Keep an eye out for any hotel information that might be included with your registration materials.

Local Transportation

Depending on how far you will be staying from the event or manufacturer you may want to rent a car. If you do rent a car you may have to pay parking fees at the hotel – you will be reimbursed, but you must cover this expense up front. Alternatively, in some cases the host runs shuttles from certain

hotels to the event and/or the airport, they will usually mention this in your registration information. If you have to pay for local transportation (bus or cab fare), be sure to ask for receipts.

Air Travel

As mentioned above, you generally will not have to cover flight expenses yourself. You can book your own flight through Egencia and it will be paid for directly by the department. (See your supervisor to obtain the correct Business Unit and Department numbers when it comes time to make reservations.) **Do not make any reservations without first getting approval from your supervisor.** Once you have made your reservation, email a copy of the itinerary to your supervisor and the training coordinator.

When to Make Reservations

The ideal time to make reservations is about one month to two weeks before the event. Don't make plans too early because many hosts reserve the right to canel their events if the enrollment is too low. At the same rate don't wait until the last minute, for obvious reasons. It is usually a good idea to check in with manufacturer before confirming travel plans, just to make sure the course is still on.

When to Travel

The general expectation is that you will do most of your traveling outside of normal business hours. But since each business trip is different you should discuss your plans with your supervisor ahead of time. You are not automatically entitled to any time off before or after the trip, but you and your supervisor can work together to decide what is reasonable for when you leave and when you come back.

Travel should also occur relatively soon before and after the event. You are not entitled to excessive "down time" at the locale prior to or after the event. If you wish to spend additional time at the locale (more than a day) you can discuss that with your supervisor, but you might not be reimbursed for the extra expenses.

Some manufacturers end the last day of their course early to make traveling easier, and some go for a full day. Review your registration materials carefully to make sure your return flight does not conflict with the last day of the course.

Payment for Travel Time

Non-exempt employees (BMETs) According to Partners Human Resources, all non-exempt employees can submit the hours they spend actively traveling (i.e. "on the plane", "in the car" or "at the airport") as working hours. That means when those employees fill out their timesheets that week they can record the time they spent traveling the same as any other working hours, and the regular overtime rules apply. Non-exempt employees will be paid eight hours for each day they are in class or at a conference, including events that take place on the weekend. They will not be paid for "off" days during the trip, such as the weekend days of courses that span more than one work week.

Exempt employees All exempt employees will be paid for eight hours on each weekday that they are in class or at a conference. They will not receive extra pay for events that take place on weekends or for "off" days during events that span more than one work week. They will not receive extra pay for travel time.

Driving Versus Flying

In cases of trips to "nearby" destinations (within approximately 250 miles) you have the option to rent a car or use your own car to drive there. (For example, people have rented cars to drive to NYC.) However, the total costs for driving (including the extra pay that would be entitled to non-exempt employees) should not be substantially more expensive than flying. If you use your own car you will be reimbursed for mileage, but don't forget that the hotel may charge parking fees, and there may be tolls along the way. (Ask for receipts at the tollbooths!) Also, note that according to the Parters policy (Section III-B.2.a), you will only be reimbursed for mileage **in excess** of your normal commuting distance.

Laptops

Some manufacturers require students to bring a laptop computer to the course. The department has a laptop that can be used in those situations, or you are free to bring your own.

_____
Revision history:
18 Oct 2010 MCC
3 May 2010 MCC
7 Feb 2008 MCC
15 Mar 2007 MCC

Travel Checklist

Once your registration is confirmed:

- Review the dates you will be away and make sure all of your responsiblities will be covered in your absence; discuss any potential problems with your supervisor ASAP
- Review any registration materials your receive to find out if you need to bring anything (like a laptop), and for any information on airports, hotels, and local travel
- Notify your supervisor if you anticipate needing the department laptop
- Notify the training coordinator if you anticipate any problems with covering the up-front expenses

About a month before the trip:

- Register on Egencia if you haven't already
- Check with the manufacturer to make sure course is still on
- "Rough out" your travel plan – when you want to go and come back, possible flights, hotel, car, etc.
- Review your plan with your supervisor and then make your reservations
- Send a copy of your itinerary to your supervisor and the training coordinator

The day before you leave:

- Double check that your responsibilities will be covered while you are away
- Notify admin of the days you will be out of the office
- Turn on your email "out of office" message (Tools → Out of Office Assistant…)

During the trip:

- Save all of your receipts

When you return:

- Fill out an expense report