**Bentley University**

**BUSINESS TRAVEL POLICY**

**General Policy Statement Covering All Business Expenses Including Travel**

Bentley faculty, staff and students are periodically expected to travel on authorized business on behalf of the university in furtherance of its tax exempt mission.

Bentley is committed to the highest level of fiscal responsibility and stewardship with regard to its limited resources. All expenses to be paid by the university must:

* be reasonable and necessary to conduct the business of the university,
* be within the approved budget allocation,
* represent an appropriate, bona fide business purpose, and
* avoid the appearance of extravagance considering Bentley’s non-profit, tax-exempt status and the fact that over 90% of Bentley’s resources to pay for expenses are from students and their parents.

This policy applies to all university travel expenses regardless of the funding source or payment method. Specific, more restrictive terms of donors and sponsors take precedence over less restrictive Bentley policy. Divisions or departments may also impose stricter rules over expenditures than those required by this policy. In all cases where the terms imposed by a donor, sponsor, division, or department are more lenient than those described herein, Bentley policy applies. It is expected that employees with spending authority (e.g., Principal Investigators) are aware of all applicable terms and restrictions and acknowledge that travel expenses charged to restricted gifts, grants or contracts are in full compliance with applicable requirements. Questions should be directed to the Director of Sponsored Programs for federal programs and to the Controller for all others.

**A. Authorizations**

Prior to securing any reservations for a business travel excursion, a Travel Authorization Form must be signed by the traveler's Cost Center Approver. No employee can authorize or approve business travel for themselves. The Travel Authorization Form should reasonably estimate the total cost of the trip and should include a detailed explanation of the business purpose of the trip. Travel Authorization Forms must be submitted to Financial Operations.

**B. Designated Travel Sources**  
  
The Bentley Business Travel program has contracted with two sources for securing flights, hotel accommodations and rental cars. If your individual or group travel needs require alternative sources, contact Purchasing, Administrative and Campus Services at extension 3456 in advance of securing a reservation.

Our primary agreement with Egencia Travel provides direct access to exclusive negotiated airfares and web airfares, hotel rates at thousands of hotels, and car rental discounts. While many reservations may be completed on-line with Egencia Travel, agent assistance is also available if needed and a higher fee will be assessed.

Our secondary source for more complex, multiple-stop international itineraries is The Travel Collaborative. Such reservations may be made through one of our assigned agents at higher transaction fees than Egencia Travel.

Egencia Travel and The Travel Collaborative are Bentley's recommended sources for travel.

**C. Air Transportation**  
  
Travelers should select the least costly air route, considering advance purchase rates and airline discounts. **Coach class seating** is to be used at all times. The use of another class of travel must be approved with appropriate written justification and authorization by a Vice President prior to ticket purchase.

Airline fees that are in addition to a coach/economy ticket (boarding or seating upgrades, insurance, etc.) will not be paid by Bentley. Exceptions require explanation and additional approval on the travel authorization or expense report.

Alcoholic drinks, headsets and movies on flights will not be paid for by Bentley.

**D. Lodging**

Travelers are expected to use prudent judgement in the selection of hotels, which should be booked in advance using Bentley's designated travel agencies. Lodging is limited to a standard room. The traveler must submit an itemized hotel bill with the Travel Expense Report. Travelers may make hotel reservations directly with a hotel, should this provide a lower cost option or group rate availability that is not offered through Bentley's designated travel sources.

When a traveler lodges with friend(s) or relative(s) while on official Bentley business, the cost of a gift or meal to the host may be reimbursed at a cost not to exceed $75. Only one gift per stay may be provided to a host, and the gift may not be alcohol. The gift or meal should be recorded as a miscellaneous expense, not a business meal or lodging. Gifts or meals in lieu of lodging cannot be charged to a federal grant.

**E. Ground Transportation**

Transportation to or from the airport for business travel or for other local transportation shall be reimbursed at the lowest cost to Bentley assuming reasonable safety and convenience of the traveler. Generally, public transportation or taxi service will be the lowest cost. Private car service is not permissible without substantiation that taxi service was more expensive or that there was a compelling business reason for the private car service besides convenience for getting from point A to point B.

The use of rental cars may be authorized when other transportation is not available or when their use results in savings of cost or time. Any person driving a Bentley leased or rented car should complete an application to be included on Bentley's insurance. Car rental insurance should thereafter be waived for travel within the United States, as such liability is covered under Bentley's umbrella insurance policy. Bentley will not pay for insurance through car rental companies. Refer to the Risk Management website for automobile policy information and application form.

**F. Meals**

1. Personal Meals  
The traveler is reimbursed for the actual, reasonable cost, including tax and gratuity, of his or her meals during the travel period. Itemized receipts for all meals over $40 must be attached to the Travel Expense Report.

2. Business Meals  
Business meals should be identified as such on the Travel Expense Report. In accordance with the IRS code, additional information is necessary when identifying business meals and entertainment on a Travel Expense Report.

The IRS requires:

* Names of all guests
* Titles or affiliations of the guests
* The business purpose must be clearly documented
* An original, detailed receipt is required.

Tips greater than approximately 20% are generally not allowed on personal or business meals.

**G. Entertainment Expense**

Entertainment expenses must be directly related to the conduct of Bentley business. IRS regulations require that a Bentley employee engage in the active conduct of business with the person(s) being entertained. The expense may not be lavish or extravagant. Documentation requirements include the date, time, and location of the entertainment, names and titles of those in attendance, and the subject of business matters discussed. Original itemized receipts for amounts of $40 or greater must accompany the request for reimbursement. Receipts for meals and entertainment expenses should include a breakdown of meal cost, beverage cost, tax and tip. Entertainment and alcohol expenses are not allowed to be charged to any federally-sourced sponsored projects and may not be allowable on other sponsored projects; contact the Director of Sponsored Programs to confirm requirements for federal grants and the Controller for all others.

**H. Miscellaneous Expenses**  
  
All costs normally associated with registering for conferences will be paid by Bentley. Other expenditures associated with business travel including business-related telephone calls, internet use, baggage service, tips and gratuities, and other reasonable travel expenses clearly related to the purpose of the travel are valid. Bentley will reimburse travelers for laundry expenses, including dry cleaning, for extended trips of seven (7) or more days.

The following expenses will **not** be paid by Bentley:

* Spouse, Dependent or Guest Travel except with bona fide business purpose and approval by the President or Treasurer
* Airline Club Membership
* Health Spa Fees
* In-room Movies
* Sundries and Toiletries
* Dry Cleaning and Laundry - except for extended trips of seven (7) or more days
* Traffic Violations
* Theft or Loss of Baggage, Personal Belongings or Money
* Costs incurred by the traveler when an itinerary is altered to accommodate personal affairs are not considered valid travel expenses.

**Any unusual items, or special circumstances causing a deviation from the policy should be fully explained and properly approved. Approval for the deviations should be obtained in advance of the travel whenever possible.**

**I. Travel Cards**

A Bentley Travel Card may be provided to pay for business travel expenses. Expenses paid with personal funds will be reimbursed upon submittal of the Travel Expense Report.

**J. Required Documentation and Submissions**

In order to comply with regulations and related audit objectives, Bentley must maintain underlying accounting data and corroborating information to support evidence of the business purpose for expenditure transactions. Employees with the authority to spend Bentley funds are responsible for the compilation and submission of adequate corroborating information so that it can be retained by the Controller’s Office. The goal is for expense documentation to clearly answer “the 5 Ws” - who, what, when, where and why. Documentation supporting each transaction must be easily retrievable for examination by central administrators, auditors and other authorized individuals. The supporting documentation should also include evidence of approvals, as appropriate. Receipts are required for all expenditures equal to or greater than $40 and explicitly not desired by the Controller’s Office for expenditures less than $40. Explanation of the business purpose and any unusual circumstances is needed for all expenditures regardless of the amount.

Following are examples of original receipts:

* Air Passenger Receipt and a copy of itinerary
* Hotel folio plus proof of payment
* Car rental agreement and proof of payment
* Itemized receipts over $40 for meals and/or misc. expenses

All travel expenses must be reported on the Travel Expense Report. The Travel Expense Report is intended to summarize all expenditures related to a business trip regardless of the mode or timing of payments. If the total amount paid by the traveler on the Travel Card exceeds the substantiated expenses, a check for the difference should be included with the Travel Expense Report.

Detailed directions for completing the Travel Expense Report are attached to the form. Additional questions should be forwarded to Financial Operations at extension 2688.

**K. Required Approvals and Authorization**

The primary responsibility for review and approval of all business travel and entertainment expenses rests with the approver of the Travel Expense Report. The approval indicates that the reviewer examined the Travel Expense Report in detail, verified the appropriateness of the expenditures in accordance with Bentley policy, and is satisfied with the amount reimbursable to the traveler.

Travel expenses are only considered valid when the expenses are properly documented as outlined above and the required approvals have been obtained.

**Approved Travel Expense Report must be submitted to Financial Operations within 45 days after completion of the trip. Expenses that are not properly substantiated with an approved Travel Expense Report within 45 days after completion of the trip will be referred to the Department Director, Department Chair, Dean, or Vice President.**