

AP 7400 Employee Travel

References:

2 Code of Federal Regulations Part 200.474 and 200.475  
ORS 244.040

**PURPOSE**

College employees are responsible for understanding, accurately reporting, and properly documenting all expenses incurred on behalf of Southwestern Oregon Community College (College). It is essential that all employees familiarize themselves with the College's expense and travel policies to ensure compliance and avoid any issues with reimbursement or financial reporting. Proper adherence to these guidelines helps maintain transparency and accountability in managing College funds.

These procedures apply to reimbursements from **all College funding sources**. Only more restrictive policies mandated by grants or programs will take precedence over SWOCC procedures.

The College reserves the right to amend or revise the travel procedures at any time. Changes will be communicated throughout the College and considered effective on the date of issuance. Whenever possible, sufficient notice will be given before the change in procedure.

SWOCC categorizes travel expenses into two main categories: Travel between destinations other than College locations (Out-of-District) and travel between College locations (In-District). Please read carefully, as procedures differ between these categories.

For travel involving students, please see AP4300 Field Trips and Excursions.

**OREGON ETHICS LAWS**

Oregon Revised Statute 244.040 prohibits public employees from obtaining financial gain from their employment beyond their salary. This includes any travel or meal expenses paid by entities other than the College, which are subject to Oregon Ethics Law (ORS 244).

Any financial benefit a public employee accepts from a credit card company resulting from using a personal credit card for college purchases would violate ORS 244.040 unless such benefits are formally adopted as part of the employee's official compensation package. This includes frequent flyer miles, rebates, discounts, and other financial incentives.

The College does NOT consider these benefits part of employee compensation packages. Consequently, employees should not accept personal benefits for college-related purchases when using a personal credit card or membership. However, benefits are allowable under ORS 244 if the following conditions are met:

- The account is dedicated to business travel.
- The account is linked to your employee email address to ensure benefits are linked to college-related activities.
- Any benefits accrued, such as frequent flyer miles or discounts, must be used exclusively for future work-related travel and purchases.

## **AUTHORIZATION/APPROVAL**

Travel requests, whether verbal or written, must be approved by the traveler's supervisor and signing authority before making reservation or travel arrangements. Approval certifies:

- Availability of funding.
- Least expensive means of travel requested.
- Compliance with funding agency regulations.
- Compliance with College reimbursement policy.
- Appropriateness of travel expenses.
- Completeness of documentation and accuracy of accounting.

All travel reservations (flights, accommodations, etc.) require an approved purchase order (PO) prior to booking.

Employees must submit a travel requisition, including estimated costs for flights, hotel, event itinerary or agenda, and other expenses, via myLakerLink for approval at least ten (10) business days before last-minute travel and at least thirty (30) days for known or planned travel.

Emergency travel exceptions must be documented and approved by a Vice President (VP) or President if approval cannot be obtained through normal travel procedures.

Out of state approval is required by the President.

## **INTERNAL REVENUE SERVICE REQUIREMENTS**

To exclude travel advances and reimbursements from taxable income, the College's travel practices must meet the IRS definition of an "accountable plan", which includes the following:

- Advances and reimbursements must be for business expenses only and must be reasonable and necessary.
- Travelers must submit a travel expense report substantiating the amount, time, and business purpose of expenses **within ten working days after the expenses are incurred**. Receipts must be forwarded to Accounts Payable.
- Employees must return any advanced amount over substantiated expenses within ten (10) working days after the completion of the trip.

## **DOCUMENTATION REQUIREMENTS**

IRS requirements are met by proper completion of the travel request. Clearly state the overall, specific business purpose of the trip in the request. Send receipts and supporting documentation to Accounts Payable. Appropriate receipts/documentation include:

- **Business Purpose:** Written explanation and/or conference schedule of events
- **Air:** The e-ticket receipt with the date purchased, the dates and points of departure and arrival, the travel "class," and the total amount paid.
- **Rail:** The e-ticket receipt with the date purchased, the dates and points of departure and arrival, the travel "class," and the total amount paid.
- **Rental Car:** For rentals outside Campus Facilities, include the rental agreement and proof-of-payment receipt.
- **Ground:** The bus, shuttle, or taxi receipt showing proof of payment.
- **Hotel:** The itemized receipt showing proof of payment.
- **Conference Fees:** Conference registration form and payment.

- **Conference/Meeting:** Agenda/conference info.
- **Other:** Receipt or invoice showing service or items purchased and proof of payment.

Receipts received for prepaid expenses (airfare, registration, hotel deposit, etc.) paid with college credit card must be submitted within three (3) business days of receiving receipt to Accounts Payable.

### **GENERAL TRAVEL GUIDELINES**

In order to optimize cost savings, travel arrangements should be made ten (10) business days or more days in advance of domestic travel and thirty (30) or more days in advance for international travel. All international travel must be pre-approved by the College President.

Travel to the event is expected on the day, provided it is reasonable. Reasonable travel means the traveler can arrive at the destination without taking an overnight flight, and with enough time to arrive at the venue comfortably before the event starts.

Return travel should be scheduled on the final day of an event if it is reasonable to safely return that day and not overall more expensive when total costs are considered. Considerations for total cost would include, flights, additional hotel and meals and any other expenses related to travel. Approvals to stay an additional day would need to be approved by the signing authority documenting the reason.

Travelers should select the most cost-effective options for transportation, lodging, and other expenses that meet business needs.

All travel expense reports must include an itinerary or agenda for the conference or meeting.

Travel records are subject to review by Business Services to ensure adherence to this policy.

Misuse of funds or failure to follow the policy may result in disciplinary action, repayment obligations, or loss of travel privileges.

The College will not pay for family, partner or travel companions. If there is an additional cost due, employees are responsible for directly covering all travel-related expenses. If any costs are charged to the college, employees must fully reimburse the College within ten (10) business days of returning from travel.

For service animals, refer to [AP 3440 Service Assistance Animals](#)

### **TRAVELING BY AIR**

In order to optimize cost savings, employees should make travel arrangements fourteen (14) or more days in advance of domestic travel and thirty (30) or more days in advance for international travel. Trip insurance is not eligible for reimbursement. Tickets should only be purchased if the traveler is certain of their availability. Travel insurance will not be reimbursed.

Airline tickets should be purchased at an economy rate with the ability to change flights and/or refundable. It should allow the traveler to pick a seat, change flights, bring a carry-on, and have additional legroom. Flight upgrades to business or first class are at the expense of the traveler and should not be charged to a College credit card or reimbursed.

Travelers are limited to one checked bag per trip within weight requirements. Additional baggage fees require justification and pre-approval as part of the purchase order process.

Flights over \$800 must be preapproved by the traveler's signing authority prior to purchasing. The traveler must provide an explanation/justification for the costs as well as the name of the approver. Any ticket in excess of \$1,000 will be denied unless preapproved by the Vice President of Administrative Services. Cost comparison outlining this must be attached to the requisition.

While some restrictions or penalties may apply, advanced reservations typically secure the lowest fares. In many cases, hundreds of dollars are saved by purchasing tickets on special or promotional flights that may require advanced booking, entail one or more stops, or depart and/or arrive at times slightly less convenient. The traveler is expected to select the cheapest airfare, regardless of personal preference. For instance, if there is a 5 AM and a 9 AM departure flight, despite the undesirability of such an early flight, the 5 AM flight should be selected if it is less expensive.

The e-ticket must include the date purchased, the dates and points of departure and arrival, the travel "class," and the total amount paid.

Canceling/changing reservations – when the traveler changes or cancels an airfare reservation due to personal preference, the traveler will incur the additional fees associated with the change.

Example 1: A traveler purchases airfare for a conference that will take place in four (4) weeks. Two weeks before the event, the traveler changes their airline reservation to attend a family event. The traveler is responsible for the cost of changing the airline reservation.

Example 2: A traveler purchases airfare for a conference that will take place in four (4) weeks. The day before departure, the traveler becomes too sick to fly and cancels their reservation. The College is responsible for the cost of the canceled flight and any change fees associated with using the airline credit in the future.

## **GROUND TRAVEL**

**If multiple travelers are going to the same destination, employees are requested to ride share to save on costs and be noted on your requisition.**

## **RENTAL VEHICLES**

Enterprise Rental Car serves as the College's designated vendor for all vehicle rentals. All reservations are required to be submitted through the Vehicle Reservation Form on myLakerLink. Exceptions apply only when personal travel directly precedes or follows official travel. Refer to page 8 for guidance.

Travelers are encouraged to rent vehicles when less expensive than a mileage reimbursement (consider time loss to pick up/drop off the car, gas, and the number of days the car rental needs to be rented in the calculation).

Always rent vehicles at the lowest possible cost. Intermediate-size car rate applies when there are three or fewer College Travelers. Larger vehicles when four or more College travelers are in one car or when equipment is transported. Additional costs due to additional days or upgrades are to be reimbursed by the employee.

Do NOT purchase a Loss Damage Waiver (LDW) and Liability Insurance Supplement (LIS) from the rental agency when renting a vehicle in the continental U.S. in the College's name. The College's general liability insurance covers the loss and damage of rental cars.

Rental cars paid for with College funds may not be used to carry anyone unrelated to College business. If the family is traveling along, the traveler should rent the car themselves and request reimbursement for the business-related portions of the trip. Some personal business, such as traveling to a restaurant while on a trip, is a legitimate use of a College-rented car.

Fuel costs for rental cars should be on a college-issued credit card. If local travel, a gas card is provided when picking up the car. If a destination rental, use the travel card issued for the trip. Every attempt to fill the tank before the rental vehicle is returned should be made to keep costs down.

Email the receipt to Accounts Payable. The receipt must clearly indicate the date paid, the dates and points of departure and arrival, the car "class," and the total amount paid.

If an accident occurs, please notify Kyle Croy, Director of Facilities Services at 541-441-8051.

### **USE OF PRIVATE VEHICLES**

Travelers may use a personal vehicle for business travel when a rental car or common carrier is not feasible or cost-effective, subject to supervisor approval. Normal commuting miles (home to regular workplace) are not allowable.

Travelers will be reimbursed at a rate set by the College, typically the IRS-approved rate. Mileage reimbursement covers fuel, maintenance, insurance, transportation, and operating costs. Separate reimbursement for these expenses (e.g., gas or repairs) is not permitted. For trips exceeding 350 miles round-trip, mileage beyond the first 350 miles may be reimbursed at 50% of the IRS rate, unless otherwise approved.

Tolls and reasonable parking charges may be reimbursed in addition to the mileage allowance for travel to non-College locations only.

Note that fuel costs are included in the per-mile reimbursement rate. If the traveler requests mileage reimbursement, the traveler will not be reimbursed separately for fuel costs.

The College does not assume liability for damage to personal automobiles used on College business and does not assume liability for deductibles or any other uninsured loss to the vehicle. Expenses for repairs, whether or not they result from the traveler's act, are not allowable. Under no circumstances will SWOCC reimburse parking fines or moving violations.

### **Documentation Requirements:**

- **Mileage Log:** Employees must submit a detailed mileage log including:
  - Date of travel, starting location and destination, and total miles driven per trip
  - Starting location is where the employee reports for the workday.
- **Maps:** For each trip, employees must provide a map (e.g., from Google Maps or a similar tool) showing the route and mileage between the starting point and destination. This ensures accuracy and compliance with IRS guidelines.
- **Submission:** Logs and maps must be submitted to Accounts Payable.
  - Monthly logs are due by the 10<sup>th</sup> of the month following the travel.

- Travel Expense Reports are due within 10 business days from return of travel.

#### **Mileage Reimbursement to a Non-College Location - Standard:**

The College will reimburse employees at the rate set by the College for mileage. If a personal vehicle is used primarily for the convenience of the traveler and the approved travel is to a location more than 200 miles beyond the point of origin, reimbursement will not exceed the lesser of the following:

1. The cost of per-mile reimbursement plus parking and tolls; or,
2. The round-trip economy airfare between the nearest commercial airport serving the origin and destination cities plus transfer costs to and from the airport; or,
3. The cost of a rental vehicle plus the cost of fuel, parking and tolls. A cost comparison worksheet may be required.

When calculating reimbursement, please use the regular college workplace location the traveler is assigned. Please include your calculation as an attachment to the expense reimbursement form.

**Exceptions Regarding Mileage Reimbursement to a Non-College Location – Employees Assigned to a high school: The high school is considered a College location for employees assigned to work in the high school. Faculty assigned to a practicum site.**

#### **Mileage Reimbursement for Travel Between College Locations – Standard:**

Employees, except as noted below, shall be eligible for mileage reimbursement (not an advance) for travel that is necessary for the job and takes place between the employee's assigned College location and the final destination before returning home. Mileage between an employee's home and a College location is considered a commuting expense and is not allowable.

#### **Exceptions regarding Mileage Reimbursement for Travel Between College Locations:**

**Adjunct Faculty:** Adjunct faculty will not receive mileage reimbursement for travel between College locations to perform work for multiple assignments. This includes administering tests, class orientations, proctoring assignments, and practicum site visits. Suppose an adjunct faculty member is expected to attend meetings or other special events away from their assigned worksite(s), and attendance has been pre-approved by the Department Chair or Dean. In that case, mileage will be reimbursed according to the standard mileage reimbursement as stated above.

#### **OTHER TRANSPORTATION COSTS**

Travelers will be reimbursed for shuttle service, taxi, Lyft, or Uber fares to and from airports and railroad stations, plus reasonable tips (customary tips are calculated at 15-20% for transportation services) when such service is not included in air and rail fares and where public transportation is not practical. This policy includes transportation between hotels, railroad stations, airports, restaurants, or meetings. The traveler shall use the least expensive method to travel between these locations. This will typically be a shuttle van service, Lyft, or Uber instead of a taxi or limo.

Document the origin and destination of all shuttle services, Uber, Lyft, or taxi trips in the travel request, and forward receipts to Accounts Payable.

Airport/rail station parking fees at the "home" airport/rail station are allowable for the time associated with business travel.

### **COST OF MEALS WHILE TRAVELING**

The College will reimburse personal meal expenses incurred while traveling on behalf of the College on a per diem basis **only**. The College credit card should **not be used** for these expenses. The full daily amount for a single calendar day when that day is neither the first nor last day of travel is \$50. The amount received on the first and last day of travel equals 60% of the meal per diem. Employees may request an advance via check or ACH prior to traveling.

Alcohol and luxury dining are not allowable.

Meals provided by conferences are to be deducted and are not reimbursed. (Breakfast 20%, Lunch 30%, Dinner 50% of daily rates).

The College will not reimburse for snacks or additional beverages that are not part of the meal.

Employees traveling out of district for a single-day meeting are eligible for reimbursement of the daily per diem rate when the total combined travel time and meeting time exceeds eleven (11) hours. A written justification must be included with the requisition.

### **COST OF MEALS WHILE TRAVELING BETWEEN COLLEGE LOCATIONS**

The cost of meals while traveling between College locations is not allowable.

### **LODGING**

Hotel Accommodations: Select a standard room at a non-luxury/moderately priced hotel/motel at the conference or government rate. Standard room rates over \$225 per night (including taxes and fees, including resort fees) must be preapproved by the traveler's signing authority before purchasing. The traveler must provide an explanation/justification for the costs as well as the name of the approver. Reservations over \$225 made before approval do not qualify for reimbursement. Room rates in excess of \$400 will be denied unless preapproved by the signing authority.

When traveling for a conference, staying at the hotel hosting the conference is appropriate as long as it is under \$400 a night. When staying at a conference hotel, check the government rate; at times, this will be less expensive than the conference rate. Travelers staying at the conference hotel must be pre-approved by their signing authority before purchase. Conference hotel accommodation exceeding \$400 purchased before approval do not qualify for reimbursement. Typically, a traveler staying at the conference hotel will not be approved to rent a car. If a special circumstance arises where a rental car is needed while staying at a conference hotel (outside of driving from home to the conference), please contact supervisor via email for preapproval.

Lodging may be shared with non-business guests. Lodging costs of non-business guests are not allowable and may not be paid with a college credit card. Accommodations such as different room types, extra rooms, and other special amenities for personal guests should be arranged by the traveler and paid directly to the hotel via a personal credit card upon checkout. The College will reimburse the amount equal to the room cost for the traveler. In some cases, the room costs for additional occupancy remain the same. The traveler should provide documentation of the rate in the requisition and expense report.

Forward an itemized hotel receipt showing proof of payment (not just a credit card receipt) to Accounts Payable.

Lodging in Vacation Rental: Travelers may select a vacation rental, Bed and Breakfast, timeshare or RV site as long as the cost is less than the hotel accommodations and all added fees (cleaning, resort fee, parking, etc.).

Lodging in Private Residence: Travelers who stay in a private residence with relatives or friends while traveling on business may not be reimbursed for lodging. Room Service and Honor Bar charges will NOT be reimbursed. Please see the cost of meals while traveling section at the end of this document for more details on per diem rates.

Cancelling/changing reservations – Hotel reservations should be canceled early to avoid cancellation fees. When a traveler changes or cancels a hotel reservation due to personal preference, the employee will incur the additional fees associated with the change.

**Personal and Business Travel Combined:** When personal travel extends a business trip, expenses are incurred by employees and submitted for reimbursement. Use the following guidelines in determining what is allowable:

**Personal travel *preceding* a business trip:**

- **Air Fare:** Allowable at the lesser of the actual airfare or the amount it would have cost if personal travel was not involved. **Documentation time-stamped and dated the same for both scenarios is required.**
- **Vehicle Rental:** Allowable for the percentage of the business-related trip calculated using the intermediate car size rate based upon the College's contracted rate with Enterprise. **The car should not be rented in the College's name.**
- **Accommodations:** The night before the conference is allowable as long as the hotel stay was necessary due to the time required to travel to the destination. Documentation is required for reimbursement.
- **Meals:** Meals on the day(s) of travel are allowable at the standard calculations.

**Personal travel *following* a business trip:**

- **Air Fare:** Allowable at the lesser of the actual airfare or the amount it would have cost if personal travel was not involved. **Documentation time-stamped and dated the same for both scenarios is required.**
- **Vehicle Rental:** Allowable for the percentage of the trip that is business-related, calculated using the intermediate car size rate based upon the College's contracted rate with Enterprise. **The car should not be rented in the College's name.**
- **Accommodations:** Generally, employees are expected to travel home the same day of the event if it is reasonable to safely return home. If the event ends after 12:00 p.m. and is more than 300 miles from the district, your signing authority may approve an additional night. The approval should be documented with justification and the name of the approver. Reimbursement requests without approval will be denied.
- **Meals:** Meals on the day(s) of travel are allowable at the standard calculations.

**MISCELLANEOUS EXPENSES**

**Allowable expenses include:**

- Standard baggage handling and storage expenses for one bag (does **not** include oversized or overweight fees)

- Business expenses (copy services, postage, etc.)
- Conference fees (forward registration to Accounts Payable)
- Currency conversion fees
- Ground transportation (taxi, bus, subway, Uber, Lyft, etc.)
- Parking and tolls
  - When parking is required during business travel, employees may be reimbursed for reasonable parking expenses incurred at airports, hotels, or other business-related destinations, provided receipts are submitted.
  - Parking costs should be minimized where possible by utilizing long-term parking options or company-approved facilities.
  - Valet parking is only to be used if no other options are available.
  - Personal parking expenses, such as at an employee's residence or non-business locations, are not allowable.
  - Parking fines or penalties are the employee's responsibility.
- Internet connectivity in the hotel and on flights when used for business.
- Electronic toll payment options for rental cars.

**Non-allowable expenses include:**

- Out-of-pocket expenses submitted more than thirty (30) days after they were incurred
- Airline club membership dues
- Travel insurance on airfare if the flight cannot be changed or refunded
- Air phone usage
- Auto repairs
- Baggage fees for oversized or overweight bags or more than one bag
- Baby-sitting
- Barbers and hairdressers
- Clothing or toiletry items
- Commuting between home and the first campus assignment
- Credit card late fees
- Country club dues
- Expenses related to vacation or personal days taken before, during, or after a business trip
- Helicopter services
- Laundry or cleaning expenses
- Loss or theft of cash advance money
- Loss or theft of personal funds or property
- Lost baggage
- Luggage and briefcases
- Magazines, newspapers, personal reading materials
- Medical expenses while traveling
- Mini-bar refreshments
- Movies
- "No show" charges for hotel or car service, except in circumstances beyond travelers' control
- Parking tickets or traffic violations
- Personal entertainment
- Personal telephone calls
- Pet care
- Recreational expenses
- Sauna, Massages
- Shoeshines

- Souvenirs or personal gifts
- Spouse's or dependents' transportation, lodging, and meal expenses

#### **TIMING OF TRAVEL REQUESTS AND RECEIPT SUBMISSION**

The timely submission of credit card charges and out-of-pocket expenses is required. This includes submitting the travel requisition in myLakerLink and delivering itemized receipts to Accounts Payable.

**Failure to do so will result in loss of college credit card privileges and only reimbursed travel with itemized receipts will be accepted.**

#### **Travel Between Non-Campus Locations**

Employees utilizing department funds with verbal or written approval for Out-of-District travel must submit the travel expense form and receipts within ten (10) days after it is incurred; submission of a travel expense report before the trip is highly encouraged. Out-of-pocket expenses submitted that have incurred more than thirty (30) days are not considered reimbursable.

#### **Travel Between Campus Locations**

Employees traveling in the District must submit the travel request and receipts at least every thirty (30) days, but not more than once a week; submission of travel requests for In-District travel prior travel will not be accepted. Travel requests for In-District travel submitted more than forty-five (45) days after they were incurred are not considered reimbursable.

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