Travel Policy and Procedure Training
University Policy 2101

All expenditures must be essential, reasonable and support the mission of the university.

- Appropriate approvals must be granted in advance of trip.
- Travel must be performed in the most economical manner.
- Travelers may be required to present receipts for all expenses.

Applies to all expenses incurred while in travel status for Faculty, Staff, Students and Visitors.
University Policy 2101

• A Travel Reimbursement request and all supporting documentation must be submitted through the Travel Request System (TRS) within 60 days of trip completion.

• Travel Reimbursements submitted more than 60 days after trip completion are subject to taxation per the Internal Revenue Service (IRS).
Pre-trip Planning and Cost Estimate

The traveler and/or delegate must research and evaluate the most economical means of travel, the following items should be considered when planning a trip:

- Business purpose for Travel
- Dates of travel
- Destination(s)
- Transportation method(s)
- Lodging requirements
- Registration fees
- Meals
- Other anticipated expenses

All travel costs must be estimated and approved before the proposed trip is made.

- Estimates should include all planned expenses and payment methods including those to be billed directly to the university.
Payment Methods

P-Card
• Mason will be billed directly
• Use for common carrier transportation and conference registration fees

Travel Charge Card
• An individual liability credit card
• Authorized for business travel expenses only
• Full balance due within 30 days

Personal Credit/Debit Card
• Individual liability
• Reimbursed after the trip is completed.

Travel advances
• Limited to Student Group travel and international travel when credit card is not readily accepted
Domestic Travel

A Travel Authorization must be approved in the Travel Request System prior to travel, if:

- the total estimated travel costs are expected to exceed $1,000
- and/or -
- the lodging costs are expected to exceed basic rates
International Travel

All international travel must be approved electronically in advance.

- Review the Office of Risk Management’s website (https://risk.gmu.edu/) at least two weeks prior to International Travel.
- Consult the Department of State Travel Advisories.

International Travelers

Travel must be approved in advance for residents of foreign countries and nonimmigrant VISA holders.

- Consult with the International Tax Office prior to making travel arrangements.
# Approval Requirements

<table>
<thead>
<tr>
<th>Determining Factors</th>
<th>Form of Approval</th>
<th>Level of Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total cost less than $1000 AND Lodging at basic rate</td>
<td>Oral</td>
<td>Authorized Approver/Supervisor</td>
</tr>
<tr>
<td>Total cost $1000 or more OR Lodging above basic rate*</td>
<td>Electronic</td>
<td>Authorized Approver/Supervisor AND Fund/Org Approving Official</td>
</tr>
<tr>
<td>To a comprehensively embargoed country (e.g., Cuba, Iran, North Korea, Sudan and Syria) OR To a militarily embargoed country such as China or Afghanistan* for a traveler who works with data controlled by the International Traffic in Arms Regulations (ITAR)</td>
<td>Electronic</td>
<td>Authorized Approver/Supervisor AND Fund/Org Approving Official AND Office of Research Integrity and Assurance (ORIA)</td>
</tr>
<tr>
<td>Traveler is a nonimmigrant VISA holder</td>
<td>Electronic</td>
<td>Authorized Approver/Supervisor AND Fund/Org Approving Official AND International Tax office</td>
</tr>
</tbody>
</table>
Other Advance Approval Requirements

Submit an approved travel authorization, AND a cost comparison statement to the travel office at least 14 days prior booking the trip for the following requests:

- When lodging costs are expected to exceed 200% of the basic rate.
- When requesting “alternative lodging” (Airbnb)
- When a Mason employee wishes to book lodging within 25 miles of his/her work place, office or home.

Approval is not guaranteed and travelers should not reserve lodging until approval has been received. No approval will be given after the trip has taken place.
Travel Request System (TRS)

• Process Travel Authorizations and Reimbursements

• Per diem and lodging rates are embedded in the system, and calculations are performed based on travel dates and location(s) entered.

• Documentation and receipts can be uploaded and attached to Travel Authorizations and Reimbursements.

• Independent of Banner Finance

• Delegate feature
TRAVEL REQUEST
George Mason University

Traveler Login >>

Important Note
Select Login above to create travel documents. You will then be prompted to enter your Mason Net ID and Patriot password.

PLEASE NOTE: When off campus or on a wireless campus connection, you must first connect to Mason’s VPN to access the University’s administrative systems. If you don’t have VPN (Cisco AnyConnect) and 2FA software installed, visit this IT Services webpage and enter “2FA” and/or “VPN” to learn more about them. For assistance with these installations, contact the ITS Support Center at 703-993-8870 or email support@gmu.edu.

Please close your browser(s) when you are done.

Delegate Login:
If you are a delegate for a Mason or non-Mason traveler (e.g., Interview candidate) enter the individual’s email below and select their status. You will then be prompted to enter your Mason Net ID and Patriot password to complete travel documents on behalf of others. For more information on Delegate access click here.

EMAIL: [Blank field] (example: username@gmu.edu),
who is a [GMU Employee]

Delegate Login >>

Click here if you are interested in being a delegate for all travelers in your department.
Please review Mason’s Travel Policies and Procedures for complete information about travel regulations and processes.

Main Menu

Please make your selection:

- Initiate Authorization
  When overnight travel costs exceed $1000 or the trip includes lodging over the basic rate, the traveler’s first line supervisor must approve the travel before the trip begins. A fiscal officer with signature authority for the fund/organization being charged must also approve the trip in advance if the traveler or supervisor does not have signature authority for that fund/organization.
- Initiate Reimbursement
- View/Edit Authorization/Reimbursement
- View Authorization/Reimbursement Approval
- Print Authorization/Reimbursement
- Delegate Overview
- Approver Overview
- Edit User Information
On travel departure and return days, travelers receive 75% of the per diem allowance, regardless of the time of departure or return. Allowance based on the rate at the location where the traveler spent the night prior.
Select appropriate department(s) from the dropdown menu.

Enter fund/org and a list of designated “Approvers” will populate.

If your department will be paying less than 100% of your expenses you can notate that in the provided section. You may also note additional fund/orgs that may be charged for travel.

Populated based on the traveler’s User Profile, can be changed as appropriate.
Primary Transportation - Personal Vehicle

Commuting mileage:

- Commuting mileage must be reduced from the reimbursable mileage expense when a traveler leaves or returns on a week day.

Mileage Rates:

- Personal rate, (currently $0.575 per mile), when personal vehicle is used for travel that does not exceed 280 miles per day.

- Fleet rate, (currently $0.246 per mile), when personal vehicle is used for travel that exceeds 280 miles per day.

- Travelers are required to access the Enterprise Trip Calculator (https://dgs.virginia.gov/fleet/travel-planning/trip-calculator/) when planning a trip that involves traveling more than 280 miles per day.
Primary Transportation – Rental Vehicle

The Traveler will be reimbursed at the fleet rate, **UNLESS***:

- Per-day mileage is under 280.
- Personal vehicle is less than the cost of an Enterprise vehicle.
- Vehicle is sold out for the requested day(s)
- The driver is younger than 21 years of age.

*Appropriate documentation must be attached to the Travel Voucher (Trip Calculator, etc.)

<table>
<thead>
<tr>
<th>Vehicle Driven</th>
<th>Trip Calculator: Enterprise Lower Cost</th>
<th>Enterprise Vehicle Available</th>
<th>Reimbursement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise</td>
<td>Yes</td>
<td>Yes</td>
<td>Rental and gas</td>
</tr>
<tr>
<td>Personal</td>
<td>Yes</td>
<td>Yes</td>
<td>Mileage @ fleet rate</td>
</tr>
<tr>
<td>Personal</td>
<td>Yes</td>
<td>No**</td>
<td>Mileage @ personal rate</td>
</tr>
<tr>
<td>Personal</td>
<td>No</td>
<td>N/A</td>
<td>Mileage @ personal rate</td>
</tr>
<tr>
<td>Personal</td>
<td>Calculator not attached</td>
<td>N/A</td>
<td>Mileage @ fleet rate</td>
</tr>
<tr>
<td>Motor Pool</td>
<td>N/A</td>
<td>N/A</td>
<td>$0 (recharge to Dept.)</td>
</tr>
</tbody>
</table>
Primary Transportation – Rental Vehicle

Reimbursement may be received for rental of an economy or mid-size vehicles, including:

- Gas/Fuel (receipts required)
- Taxes charged

Reimbursements will NOT be received for:

- Vehicle rentals from informal/non-traditional sources (including: from friends, colleagues or relatives)
- Luxury vehicle rentals
- Fuel agreements or refuel charges
- Insurance

Learn about Transportation: https://fiscal.gmu.edu/travel/use-transportation/
Primary Transportation – Rental Vehicle

Insurance on rental vehicles

Employees should decline liability damage waiver (LDW) and collision damage waiver (CDW), and other insurance forms such as personal accident insurance (PAI) for travel within the United States.

• Non-state employees must provide documentation if such coverage does not exist.

• International Travel: All travelers **must purchase appropriate insurance** and will be reimbursed for all reasonable, necessary and actual insurance premiums.

Learn about Transportation: [https://fiscal.gmu.edu/travel/use-transportation/](https://fiscal.gmu.edu/travel/use-transportation/)
Primary Transportation – Motor Pool

Motor pool will make payment to Enterprise on your behalf and debit your fund/org through the University recharge process. Motor pool may provide you with a University fuel card for use with your Enterprise rental during official travel.

• Additional information can be found, here: https://transportation.gmu.edu/motor-pool/
• Training requirements & restrictions may apply
Primary Transportation – Air & Rail

• Payment of commercial airfare or rail travel is appropriate when traveling on university business.
• Airline and rail travel cannot exceed the rates charged for tourist or coach class accommodations.

The Following are NOT reimbursable expenses:

• “Enhancements” to the coach fare, including situations when the upgraded seats are the only ones available on a desired flight.
• Travel protection/insurance
• Acela service on Amtrak

Review the [Flight Comparison](#) and [Travel manual](#) for more information.
Non-refundable economy/coach class must always be selected.

Exemptions are permitted for the following:

**Air:**
- Travel to western Europe and business meeting is conducted within three hours of landing
- The travel is for transoceanic, intercontinental trips of more than eight hours

**Rail:**
- Reserved coach seats are not offered on the route

**Air & Rail:**
- The traveler agrees to pay the difference.
  - Comparison based on date of purchase, and uploaded to Travel Voucher

ALWAYS Include appropriate documentation for exemption requests.
Primary Transportation – Travel Arrangements

- Travel arrangements can be made using any travel agency, ticket provider or online service.

- The following must be uploaded and attached to the Travel Reimbursement Voucher:
  - The confirmation document (all pages) generated at the end of the reservation process showing total cost and class of service
  - When a paper ticket is issued, the passenger receipt (ticket stub)

The Mason traveler is responsible for ensuring that he/she is complying with State and University travel policy.

For more information review the “Booking Travel Online” page on the fiscal services website.
Fly America Act

When federal funds are used, provisions of the Fly America Act are applicable and international travel is restricted to a U.S. air carrier unless circumstances meet the qualifications for a waiver.

• Please use the [Fly America Act Decision Tree](http://osp.gmu.edu) prior to booking international travel.

• For more information please visit [http://osp.gmu.edu](http://osp.gmu.edu).
Additional Transportation Costs
(Secondary Transportation)

Reimbursement may be provided for:

• Toll Charges
• Rental vehicles
• Local Transit
  • Commuter bus/train, shuttle, taxi, Uber, Lyft, etc.
• Parking Fees
  • Airport parking must be most economical rate.
  • Parking at any Mason campus will NOT be reimbursed to employees/students.

Receipts are required when the reimbursement claim exceeds $75.
### Extended Trip Initiate Authorization

**Secondary Transportation**

**Transportation to/from airport or other terminal:**
- Origin city and state (e.g., Fairfax, VA):
- Destination facility (e.g., Dulles Airport):

**Vehicle type:**
- [ ] Personal vehicle - Round trip/Total miles: ___________
- Does the trip begin or end on a normal workday?  Yes ▼
- If yes, enter one day’s normal one-way commuting mileage: ___________
- Home address: ___________

*Note: Reimbursable Miles (trip includes a workday) = Total Miles - One Day’s Round-trip Commute*

**Other - Please describe (e.g., taxi, shuttle, bus, etc.):**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>

*back*  *reset*  *main menu*  *continue*
Lodging Rates

- Lodging expense reimbursement varies with the travel destination [season].
- Lodging rates are governed by the U.S. General Services Administration (GSA).

“Standard Rate” will apply for locations without specific rates.

- Verify travel dates.
- If travel includes multiple destinations, adjust dates for this location as necessary.

Information on GSA per diem rates can be found:
(Updated annually October 1)
TRS will provide lodging rates based on location identified on the previous page. Including the Maximum rate (Conference lodging rate)

<table>
<thead>
<tr>
<th>Basic lodging rate for this location: $144.00 per night</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference lodging rate (up to 200% of the basic rate): $288.00 per night</td>
</tr>
</tbody>
</table>

The total daily lodging amount for Mason travelers sharing a room cannot exceed the maximum daily lodging rate for a single traveler.

- Lodging costs up to 200% of the basic rate requires electronic approval in advance.
- Lodging costs greater than 200% of the basic rate must be approved at least 14 days prior to trip.
Lodging Rates

Lodging reimbursement requests must be supported by an itemized hotel bill, and attached to the Travel Reimbursement.

**Itemized hotel bill should include the following information:**

- Hotel name and address, Charge details (including, taxes and fees)
- Business related expenses (Internet, business calls, etc.)
  - Note Business purpose on bill as appropriate
- Zero balance

For hotel rooms obtained through internet providers, the traveler must upload and attach the entire receipt (all pages) from the internet site showing total cost and confirmed services.
Lodging Rates

The following situations require prior approval from the travel office at least 14 days prior to booking the trip:

- Exceeding the maximum lodging rate
- Alternative Lodging
- Local lodging

Each request requires:

- A fully approved travel authorization
- Explanation of the circumstances justifying the request
- Cost comparisons statement - Include a list of three hotels in the vicinity of the event/requested lodging and their rates

DO NOT make a purchase or deposit without documented approval
Alternative Lodging

In addition, requests for alternative lodging should include the following documentation:

✓ A comparison showing the total cost for alternate accommodations and net savings.
✓ Payment, Cancellation and Refund policies
✓ Length of contract

Alternative lodging requests must be submitted to travel@gmu.edu for approval 14 days prior to making the purchase.

Because of concerns that these services are not regulated and do not protect users to the same extent as commercially regulated business, university employees choosing to use these services do so at their own risk.

Please review the Alternative Lodging Guide for more information.
Local Area Travel

- Reimbursements may **NOT** be given for local lodging.
  - Defined as locations within 25 miles of the workplace, office or home.
  - Prior approval required
- Reimbursements may be given for non-commuting, local business travel expenses.
  - Including trips between campuses or to other locations to attend meetings or trainings, to deliver paperwork, etc.
  - Travel may be by personal vehicle or Local Transit (i.e., Commuter bus/train, shuttle, taxi, Uber, Lyft, etc.)
Candidate & Guest Travel

- Departments are encouraged to organize travel arrangements in advance via P-Card and Direct Bill, as available.
  - The Purchasing Office has negotiated contracts with several hotels in the local area.
- Reimbursements may be processed for travel related expenses. The following must occur if reimbursement is expected:
  - Complete and return the Substitute W-9, Submitted to papadmin@gmu.edu to create a G# for the visitor.
    - Instructions for International Travelers.
  - Use TRS “Delegate Login” to process Authorization/Reimbursement, as appropriate.

Please review the Host a Candidate page for more information.
Meals & Incidental Expenses

Per diem rates for meals and incidental expenses are also governed by the GSA (http://www.gsa.gov/mie)

- Per Diem must correspond to the location specified for the overnight lodging, and include the following:
  - Meals, including taxes and tip/gratuity*
  - Transportation to meals
  - Personal telephone calls
  - Laundry expenses
  - Tips to baggage handlers

- “No-cost” meals must be deducted in TRS

- On travel departure and return days, travelers receive 75% of the per diem allowance.
  - Return day allowance is based on the rate at the location where the traveler spent the night prior regardless of the time of departure or return

*Maximum gratuity is 15% (If gratuity is automatically added to your bill, the total gratuity cannot exceed 20%)
Examples of expenses that may be reimbursed:

- Internet charges
- Business calls
- Facsimiles
- Data transmission charges

- Passport and visa expenses
- Vaccination fees
- Registration fees

Some expenses may require documentation of the business purpose for the charges incurred.
Unallowable Expenses

Examples of common expenses that are **NOT** reimbursable (not all-inclusive):

- Alcoholic beverages
- Damage to personal property
- Expenses for non-business companions
- Lost or stolen articles
- Movies charged to hotel/motel bills
- Personal negligence
- Towing charges
- Travel to meals, or other non-business locations

To learn more about Personal Travel with Business Travel please review the following [Guide](#)
International Travel

Employees who travel outside of the United States, should convert all expenses to US dollars.

• Lodging and per diem rates for international destinations are not embedded in the TRS.
  • The traveler/delegate must find the appropriate location [season] rate and enter the information into the Travel Authorization.
  • Rates for international destinations: https://aoprals.state.gov/web920/per_diem.asp

Conversions documentation must be upload to Travel Voucher. Suggested site for currency conversion rates: https://www1.oanda.com/currency/converter/
International Travel

TRAVEL REQUEST

Add a Location For International Trip

Location visited for trip: jadams15-July-2019-test

Please enter locations in chronological order, from first location visited to last

City: 

Country: 

For per diem rates for Alaska and Hawaii, click here. Then select Alaska or Hawaii in the Outside CONUS section.
For Meals and Incidental Expenses (M & IE) rates for all other international locations, click here, then select the appropriate country from the dropdown.
The M & IE rate consists of four components: breakfast, lunch, dinner and incidentals.
To view the allocation, click here. For example, if the M & IE rate is $200, the following allocation applies: $30 breakfast $50 lunch $80 dinner $40 incidentals

Maximum lodging rate/day: $ 

Maximum MI & E rate/day: $ 

Breakfast rate $ 

Lunch rate $ 

Dinner rate $ 

Incidentals rate $ 

Number of days staying at this location: (excluding trip departure and trip return days)
Travel Reimbursement

Travel Reimbursements **MUST** be submitted as soon as possible, requests submitted more than 60 days after trip completion are subject to taxation per the IRS.

- Once the trip is complete the traveler/delegate should process the reimbursement from the authorization, if applicable.
- Attach all required documentation and receipts for reimbursement to the travel voucher.
- Approvers should make every effort to review and electronically approve or return travel vouchers within three business days.
- Original receipts should be retained by the traveler until reimbursement of expenses is received.
Travel Reimbursement

For previously authorized trips, the traveler will enter actual amounts to replace cost estimates where appropriate.

Initiate reimbursement requests in the TRS for standard overnight trips costing less than $1,000 with basic rate accommodations or trips that include mileage or transportation only.

Multiple “transportation only” trips may be consolidated into monthly travel vouchers.
**Information Verification**

The TRS gives an opportunity to verify the information submitting an authorization or when preparing a reimbursement. This screen will give the ability to edit authorization information – And/or – Update for reimbursement requests.

This is where you will be able to add additional information (location, lodging, event, etc.)

### Location

<table>
<thead>
<tr>
<th>Location</th>
<th>Add a location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location #1: SAN DIEGO(SAN DIEGO), CA</td>
<td></td>
</tr>
<tr>
<td>Edit this location</td>
<td></td>
</tr>
</tbody>
</table>

**Arrived:** 12/16/2017  
**Departed:** 12/18/2017

### Lodging

<table>
<thead>
<tr>
<th>Add a lodging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hilton Gaslamp Quarter</td>
</tr>
<tr>
<td>Delete this lodging</td>
</tr>
<tr>
<td>Edit this lodging</td>
</tr>
</tbody>
</table>

**Cost per night before tax:** $120.00 (paid by traveler)  
**Tax per night:** $12.00  
**Total number of nights:** 2  
**Number of nights included in conference registration fee:** 0  
**Use conference rate:** No  
**Justification:**  
**Room sharing:** No

### Event

<table>
<thead>
<tr>
<th>Add an event</th>
</tr>
</thead>
<tbody>
<tr>
<td>National College Conference</td>
</tr>
<tr>
<td>Edit this event</td>
</tr>
</tbody>
</table>

**Registration:** $300.00 (not paid by traveler)  
**Conference meals:** 0  
- free breakfast(s)  
- 0 free lunch(s)  
- 0 free dinner(s)
Information Verification

The TRS gives an opportunity to verify the information submitting an authorization or when preparing a reimbursement.

This screen will give the ability to edit authorization information – And/or – Update for reimbursement requests.

Review and update

Attach receipts, documents, etc.

Add Comments, as appropriate
Role of Approver

Authorized Approvers/Supervisors, Fund/Org Approvers and Optional Approvers must review all travel authorization and reimbursement documents before electronically approving.

***** APPROVER ACTIONS *****

After logging in and reviewing the travel document, including any previous approvals, you may:

1. Approve the document as submitted by selecting "Approve" and the "Complete" button to send the document to the next approver.

   OR

2. Not approve the document as submitted by selecting "Return to submitter with comments" and "Complete" to return to this document to the submitter. You will use this option to completely disapprove the travel authorization/reimbursement or to request corrections/adjustments to the travel document. Whenever this option is selected, you must complete the "Reason" box to explain why you are returning the travel document. Examples of reasons include, "travel not approved, inadequate budget" or "this authorization not approved, please charge org xxxxxx instead of org yyyy," or other appropriate comment. When "Return to submitter with comments" is selected, the travel document is returned to the submitter and may be revised by the submitter and re-submitted to the approval process.

   If you select "Save & Close", your work on the travel document will be saved and the travel document will be retained in your account and included on your Worklist; the document will not be processed further.

   If you select "Cancel", the document remains in your Worklist in its original form, any work you may have done is not saved.

Approval certifies that the travel and expenses were necessary and incurred while on official Mason business.
# View Authorization/Reimbursement Approval

## TRAVEL REQUEST

![George Mason University Logo](https://example.com/gmu-logo.png)

### Document Status

<table>
<thead>
<tr>
<th>Trip Name</th>
<th>Document Type</th>
<th>Approval Status</th>
<th>Last Update</th>
<th>View Document / History</th>
</tr>
</thead>
<tbody>
<tr>
<td>jadams15-April-2019-Blacksburg</td>
<td>Reimb</td>
<td>Approved</td>
<td>05/09/2019</td>
<td>View Document / History</td>
</tr>
<tr>
<td>jadams15-April-2018-Lexington</td>
<td>Reimb</td>
<td>Approved</td>
<td>05/25/2018</td>
<td>View Document / History</td>
</tr>
<tr>
<td>jadams15-October-2017-Richmond</td>
<td>Reimb</td>
<td>Approved</td>
<td>11/10/2017</td>
<td>View Document / History</td>
</tr>
<tr>
<td>jadams15-October-2017-Richmond</td>
<td>Auth</td>
<td>Approved</td>
<td>11/02/2017</td>
<td>View Document / History</td>
</tr>
</tbody>
</table>
Users will receive an email stating that the document has been submitted for approval. Once all approvals have been recorded, users will receive an email stating that the document has completed the approval process.

The traveler may not edit the trip while it is in the approval process.
When all approvals are received the Travel Office will review for accuracy and initiate the reimbursement.
Travel Request System: https://travel.gmu.edu

Travel Resources and Customer Support

• Travel: travel@gmu.edu - Travel policy/procedures, Travel Request System (TRS), general business Travel inquiries.
  Travel Office Website: http://fiscal.gmu.edu/travel/

• Purchasing: Phone: 3-2580
  purchap@gmu.edu - for all signature cards
  papadmin@gmu.edu - for all W8’s,W9’s creation of G#’s

• Training: Jessi Adams, jadams15@gmu.edu, 3-5966

Finance Admin. Systems Team (FAST): fast@gmu.edu - contact for login or system problems