Material Changes

- The *Mason Finance Gateway* is the replacement for the *Travel Request System*.
  - Travel Authorization is now termed Pre-Approval
  - Travel Reimbursement is now termed Expense Report
  - Language changes from Fund/Org Approver to Org Approver. Note: The Signature Card database is being replaced by Banner Level 4 Org Approval. For more information please review the [L4 Org Approver Overview](#).
- Remove *Policy 2102 – Food and Beverage Expenditures*, and combine elements with the existing Travel Policy. Rename Policy 2101 to “Travel, Meals and Entertainment Expenditures.”
- Add policy section for food, beverage and entertainment expense. Please review the specific changes to procedures on the [Food & Beverage Procedures Draft](#) and provide feedback.
- Remove procedural items from the Travel Policy to make procedural changes easier to update. *Note: Procedures carry the same weight as the policy.*
- Remove Pre-Approval requirement when Hotel exceeds the basic rate. *Note: Pre-Approval is required if total exceeds $1,000 for employees.*
- Pre-approval is not required for candidates or students through the Mason Finance Gateway; however, all travel should be approved verbally or agreed by the department prior to incurring expenses.
- Remove additional requirements for using Alternative Lodging.
- No change to current travel procedures related to mileage, per diem, hotel rates, payment methods, or other procedures not specifically mentioned in the policy.

**Please submit all feedback on the combined Travel, Meals, and Entertainment policy and the updated procedures for Food and Beverage Expenditures using this Qualtrics survey:** [https://gmu.az1.qualtrics.com/jfe/form/SV_2n3Q8Lv8gHhBOUl](https://gmu.az1.qualtrics.com/jfe/form/SV_2n3Q8Lv8gHhBOUl)

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**Travel, Meals, and Entertainment Expenditures (policy draft)**

**University Policy Number 2101**

**Categorized:** [Financial](#)

**Responsible Office:** [Fiscal Services](#)

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**I. Scope**

This policy applies to all George Mason University employees, students and all other organizations and individuals that intend to travel at university expense. These requirements have been established to ensure sound fiscal stewardship of funds and compliance with applicable federal and state laws. Compliance with this policy and all
related procedures is the responsibility of the person incurring expenses on behalf of the university, and those who certify compliance with these requirements by verifying funding availability and approving expenditures.

II. Policy Statement

As an Agency of the Commonwealth of Virginia, George Mason University (Mason) has a public obligation to ensure that all expenditures are essential, reasonable and support the mission of the university. Expense incurred on behalf of the University must be consistent with the university mission, performed in an economical manner, and not exceed the limitations imposed by Mason. Expenditures will be reviewed for compliance in that the expenses were necessary, appropriate, and within prescribed limits.

Expenditures are open records and subject to public review and individuals are expected to exercise prudent judgment when incurring business expenses. Actual receipts for all expenses, except for meals and incidental expenses (reimbursed on a per diem basis) and transportation costs below $75 per instance, are required.

Reimbursement requests and all supporting documentation must be submitted through the Mason Finance Gateway within 60 days of trip or event completion. Reimbursements submitted more than 60 days after trip or event completion are subject to taxation per the Internal Revenue Service (IRS).

The University will not reimburse expenses that have been or will be paid by other payers. The University will not reimburse any expenses that were charged directly to P-Card and, consequently, already paid by the University. The reimbursement received by an individual from all sources must not exceed the total expenses incurred by that individual.

III. Responsibilities

Travelers are responsible for performing their travel duties in conformity with the provisions of this policy and must submit legitimate and complete documentation to support their travel reimbursement claims. Individual travelers are responsible for reviewing and approving documentation if prepared by a delegate.

Principal Investigators (PIs) and Unit Administrators are responsible for reviewing award budgets and travel restrictions when sponsored research funds are charged to ensure that travel costs charged to sponsored funding are allowable. Review the Travel and Fly America Act section under Sponsored Expenditures located on the Office of Sponsored Programs (OSP) website at https://osp.gmu.edu/sponsored-expenditures/.

Supervisors are responsible for reviewing and monitoring all travel expenses that they approve. Such approval will ensure compliance with this policy and certify that the expenses were necessary, appropriate and incurred while on official university business.

Org Approvers (fiscal officers within a unit) are responsible for reviewing and monitoring all travel expenses that they approve. Such approval will ensure compliance with this policy and certify that the expenses were necessary, appropriate and incurred while on official university business.
The Office of Research Integrity and Assurance (ORIA) is responsible for reviewing and approving international travel in advance of traveling to a comprehensively embargoed country (e.g., Cuba, Iran, North Korea, Sudan, Syria and the Crimea region of Ukraine) OR to a militarily embargoed country for a traveler who works with data controlled by the International Traffic in Arms Regulations (ITAR). A list of currently embargoed countries is available at https://www.pmddtc.state.gov/embargoed_countries/.

The University Travel Advisory Committee (UTAC) is responsible for reviewing and approving international travel in advance of traveling to countries or areas under U.S. Department of State Travel Advisories Level 3 and 4, Centers for Disease Control and Prevention (CDC) Level 3 warnings, or countries under comprehensive economic sanctions.

The International Tax Office is responsible for reviewing and approving travel in advance of traveling when the traveler is a non-immigrant visa holder.

The Purchasing and Accounts Payable Department is responsible for administering the provisions of this policy and providing guidance to travelers through the Travel Office.

The Controller is responsible for reviewing and providing approval/denial of any exception to the provisions of this policy. Exceptions will only be considered if submitted in advance of the travel.

IV. Travel Transactions

Domestic Travel

A domestic trip where costs are not expected to exceed $1,000 will be approved verbally in advance by the traveler’s Supervisor.

A domestic trip where costs are expected to exceed $1,000 will be approved electronically in advance by the traveler’s Supervisor and the associated Org Approver. A Mason employee traveler or their delegate must complete a Pre-Approval in the Mason Finance Gateway and receive approval prior to travel.

Local Travel

Non-commuting travel expenses may be reimbursed when individuals must travel in the local area on official business. Normal commuting mileage and expenses are not reimbursable; only the net additional mileage or expenses may be claimed.

An employee is generally not reimbursed for lodging within 25 miles of his/her work place, office or official station. If extenuating circumstances and budget permit, an employee may request an exception and obtain advanced approval for lodging in the local area. A Pre-Approval, approved by the traveler’s Supervisor and Org Approver, may be submitted to the Controller for consideration. To request an exception please contact the Travel Office at least 14 days prior to reserving local area lodging for an employee. No approval will be given after the trip has
taken place. Local area lodging paid for guests of the university (e.g., employment candidates) are considered travel expenses and should be included with the estimated cost of the trip if the trip is expected to exceed $1,000. Contracts with local area hotels are listed on the Travel Office webpage at the Fiscal Services website. Visitors are limited to the appropriate local contracted hotel/motel rate when, in special situations, they obtain their own lodging.

International Travel

All international travel must be approved electronically in advance by the traveler’s Supervisor and the associated Org Approver. The traveler or delegate must complete a Pre-Approval and receive approval prior to travel.

The Office of Research Integrity and Assurance (ORIA) must approve, in advance, when international travel is:

- To a comprehensively embargoed country (e.g., Cuba, Iran, North Korea, Sudan, the Crimea region of Ukraine and Syria).
- To a militarily embargoed country (list of these countries available at: http://pmddtc.state.gov/embargoed_countries/) for a traveler who works with data controlled by the International Traffic in Arms Regulations (ITAR).

The University Travel Advisory Committee (UTAC) must approve, in advance, when international travel is:

- To countries or areas under U.S. Department of State Travel Advisories Level 3 and 4, Centers for Disease Control and Prevention (CDC) Level 3 warnings or countries under comprehensive economic sanctions.

Mason provides International Emergency Insurance for employees travelling on university business overseas. To obtain insurance coverage documents please complete the International Emergency Insurance Registration Form and submit to the Office of Risk Management at least two weeks prior to your trip.

Group Travel

Occasionally, faculty or staff members may supervise a group of students on a university-sponsored activity that requires travel outside of the local area. In these situations, the faculty or staff member should contact the Travel Office for guidance. Group travel may qualify for a Travel Advance to reduce out of pocket expenses for students. Travel involving Mason employees only, does not qualify as group travel and individual travelers will be responsible for their own business travel expenses.

Personal Travel with Business Travel

Occasionally an employee may take a trip that includes both personal and business travel or the trip may originate/culminate at a location, other than the base location, due to personal reasons. When personal and business travel is combined, the traveler may only be reimbursed for expenses equal to or less than the cost incurred if originating/culminating at the traveler’s base location (excluding personal travel). In addition, when the cost of the additional personal travel exceeds the business travel expense, travelers may not use any form of Mason payment (Mason P-Card or Travel Agency billing). The traveler is required to add an annotation in the “comments”
section of the Pre-Approval and Expense Report that the trip includes both personal and business travel. Specific dates of personal travel must be noted. Specific instructions are available in the Personal Travel with Business Travel Guide.

Special Accommodations

Mason complies with the Americans with Disabilities Act (ADA). The Office of Compliance, Diversity and Ethics must certify travelers requiring special accommodations due to physical or other disabilities prior to making trip arrangements.

V. Non-Travel Transactions

Meals and Entertainment Expenditures

As an Agency of the Commonwealth of Virginia, George Mason University has a public obligation to ensure that all expenditures are essential and reasonable and that they support the mission of the university. As such, state rules prohibit expenditures for employee personal expenses, including meals, snacks, entertainment, and refreshments. There are limited circumstances in which it is considered appropriate to provide food and beverages to personnel who are not in travel status. Participant Funded events, where the food/beverage costs are paid solely from participant fees (i.e., registration fee) are not subject to the policy.

Food/Beverage may not be provided at regularly scheduled or routing meetings (i.e., monthly staff meeting, quarterly unit meeting) or as a way to boost morale or promote goodwill among employees. Alcohol and Flowers are prohibited.

There are three basic types of food purchases that occur at Mason:

1. **Catering** is the activity of providing food and drink for a group of people, typically with services such as setup, staffing, and cleanup included.
2. **Business meals** are defined as a meal provided at a commercial dining establishment open to the general public, or at a university location as long as no service other than delivery/pickup is provided. A business meal may occur in travel or non-travel status.
3. **Supplies/Food and Drink** is the purchase of food, drink and supplies that does not include any vendor-provided services.

Entertainment Expenditures

In limited circumstances, it may be considered appropriate to incur entertainment expenses during a business meeting that involves substantive and bona fide business discussions with an outside party, or parties, in attendance.

VI. Grants and Contracts
The dollar limitations described above also apply to travel conducted in support of grants and contracts sponsored by outside agencies unless the underlying grant or contract specifically provides different reimbursement policies or rates. Pre-Approvals and Expense Reports applying this exception must provide a statement to this effect signed by the Principal Investigator and the Associate VP for Research Operations.

Please submit all feedback on the combined Travel, Meals, and Entertainment policy and the updated procedures for Food and Beverage Expenditures using this Qualtrics survey:
https://gmu.az1.qualtrics.com/jfe/form/SV_2n3Q8Lv8gHhBOUI