



TRAVEL POLICY AND PROCEDURES MANUAL

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ABET
111 Market Place, Suite 1050
Baltimore, MD 21202

Telephone: +1.410.347-7700
Fax: +1.410.625.2238
Website: <http://www.abet.org>

ABET Travel Policy and Procedures Manual

Dear Traveler:

These guidelines are intended to assist ABET volunteers and staff in planning travel, and in the proper procedures for filing expense reports. Our goals are twofold: first, to meet our financial management responsibilities, and second, to avoid unnecessary delays in the reimbursement of your expenses.

All travelers should be aware that only persons who are authorized prior to visiting campuses or attending pertinent meetings and activities will be reimbursed for their expenses. Reimbursable expenses are established according to the budget limit established by the Board of Directors for the activity. ABET staff will advise volunteers of the extent to which travel may be reimbursable. If there is a question on reimbursements or allowable expenses, please seek guidance from your respective Team Chair, Committee Chair, or Staff Liaison.

To facilitate financial and cost controls, Team Chairs, Committee Chairs, and Staff Liaisons should have a very clear understanding of the budget provided for any given activity, and their responsibility for controlling travel costs. To avoid misunderstandings, travel by volunteers and staff must be planned and authorized in advance. This will avert any after-the-fact disagreement or, worse, the need to curtail travel or withhold a reimbursement.

If you have any questions after reading this manual, contact the ABET Accounting Department at +1.410.347.7735.

Michael K.J. Milligan
Executive Director

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SECTION A

1. Purpose of Trip

It is ABET's policy to reimburse reasonable expenses incurred by those individuals who are authorized to attend specific visits or meetings. For each listed day on the Expense Report, it is necessary to indicate the authorized travel purpose. There will be instances where an individual will have an unavoidable gap between meetings and where it would not be economical or possible to return home and come back (e.g., after a Saturday stay over) in a few days. Under those circumstances, the reasonable expenses actually incurred for meals and lodging will be reimbursed, subject to prior approval.

2. Authorization

Travel by volunteers and staff must be planned and authorized in advance. This will avert any after-the-fact disagreement or the need to curtail travel or withhold a reimbursement.

3. International Travel Policy

Before a volunteer or staff member decides whether to travel to any country or location, it is his/her responsibility to obtain health and safety information from sources such as, but not limited to, corporations knowledgeable about travel to such locations, U.S. State Department public announcements, commercial security agencies, U.S. Centers for Disease Control and Prevention, or in-country consular offices. Further, the traveler should obtain from the primary liaison at each institution or location current information regarding personal safety, medical precautions, or travel risks in the country or location. Travel to any country or location is voluntary, and the individual volunteer or staff member may, without prejudice, decide whether he or she wishes to proceed with travel to such locations. All individuals traveling to any country outside of the U.S. are required to execute the Travel Waiver and Release Agreement prior to initiating such travel.

SECTION B – Travel Agent

ABET volunteers are strongly encouraged to use ABET's travel agent with which it has made special arrangements. These arrangements help ABET to manage travel costs while providing better service to all concerned. All ABET employees are required to arrange ABET-related travel through this agency only.

In addition to securing the lowest available fares, ABET's travel agent also provides last-seat availability and boarding passes on all major airlines. Most tickets will be electronic; however paper, tickets may be sent anywhere in the U.S. and can be sent to overseas airline terminals for a fee.

You can create a personal profile and make reservations by following the instructions posted on <http://www.abet.org/travel-information/>.

ABET's travel agent will bill ABET directly for ABET-authorized travel while permitting the traveler to accrue frequent flyer miles.

SECTION C – Air Travel

ABET will assume no liability related to travel in private aircraft or on non-certified carriers by staff or volunteers. Reimbursement for such travel will be limited to a sum equivalent to the lowest non-refundable commercial fare available through ABET's travel agent. Volunteers or staff traveling on ABET business shall purchase coach/economy non-refundable tickets except where business class is indicated. Business class (non-refundable) is indicated on the international legs of travel when one international leg alone is greater than six hours, or if it is more cost-effective to purchase all legs on business class when one leg has met the criteria listed above for business class. Otherwise, all legs departing and arriving within the same country must be purchased at the lowest non-refundable commercial coach/economy fare available. All international travel must be preapproved by the appropriate ABET staff director.

In the special case of PEV candidate training, air travel (international or in-country) shall be reimbursed at the lowest available non-refundable coach/economy commercial fare booked three (3) weeks in advance.

In the event that you must change your travel arrangements and thereby incur an additional expense or penalty for your ticket's cancellation, you must provide a written explanation of the circumstances along with your expense report. Travelers shall take advantage of discounted fares where there is little likelihood that change will be necessary. If such a change is required because of reasonable circumstances, ABET will reimburse you for penalties on your ticket. Changing pre-approved travel to an earlier return due to a meeting or accreditation visit ending ahead of schedule does not constitute a reasonable circumstance.

SECTION D – Purchase of Tickets

ABET's travel agent will arrange ticket purchases through billing directly to ABET for approved travel. You may also use your personal American Express, VISA, or Master Card if you have been approved as an ABET traveler. Tickets must be purchased no later than three (3) weeks prior to the scheduled event. Reimbursement for any ticket shall not exceed the cost of a non-refundable ticket purchased from ABET's travel agent three (3) weeks in advance. (Please note that any traveler that chooses not to use ABET's travel agent is assuming the risk of not receiving full reimbursement if the stated Travel Destinations ticket price is exceeded.) All exceptions when air travel cannot be booked three (3) weeks in advance must be approved by the appropriate ABET Director. Free travel accident insurance is available when billed through ABET's travel credit account. We encourage you to book travel well in advance to obtain the lowest fares available at all times.

Please review the fee schedule below and when booking or changing travel arraignments please be mindful of the various charges. There are no fees for inquiries whether via telephone or internet, and the fees below are only incurred when travel is booked or changes to existing itineraries are made.

- Travel reservations booked online: \$12
- Travel reservations booked online via SWABIZ (link to book flights on Southwest): \$12
- Travel reservations booked via telephone: \$28(domestic)/\$40(international)
- All requests to change an existing itinerary made via telephone or online: \$28(domestic)/\$40(international)

It is the responsibility of each volunteer and staff member to return to the Business Office unused tickets that were billed to ABET. An "unused ticket" is one that is not needed in whole or in part as a result of

changes or cancellations of travel plans or changes in itineraries. If the ticket was charged to your personal credit card, you have the responsibility of resolving the charge.

SECTION E – Reporting Expenses Charged Directly to ABET

There is no need to report expenses charged directly to ABET on your expense report. By virtue of these expenses being charged directly to one of our corporate credit accounts, we already possess the necessary documentation. However, when charging travel to the ABET travel account through ABET's travel agent, you may submit the original ticket stub with your expense report.

SECTION F – Lodging

1. Hotel Rooms

Reimbursements will be based on standard single room rates (including taxes) in a standard business hotel. For the purposes of this policy, standard single room rates (including fees and taxes) in excess of daily lodging rate limit, posted at <http://www.abet.org/travel-information>, will not be reimbursed unless prior approval has been received from the appropriate ABET Director. ABET highly recommends that our travelers utilize ABET's travel agent to ensure they receive the best-quality accommodations available. Team Chairs are permitted to book suites to accommodate team meetings. Room charges must be recorded on a daily basis. The original itemized hotel bill must be attached as a receipt. Reimbursement is limited to the evening preceding the visit or meeting, each night of the visit or meeting and, in some cases, the night following the visit or meeting.

SECTION G

1. Meals

Itemized receipts must be provided for full reimbursement of **all** meal expenditures exceeding US\$25.00 per day. No more than US\$25 will be reimbursed for unsubstantiated expenses incurred in any given day.

No daily meal expense should exceed US\$100.00 per volunteer.

Meal expenditures will not be reimbursed when ABET has already provided that meal at an event.

***Note:** In the event that you are required to extend your stay to secure special discounted fares that would not otherwise be available, your additional hotel room and personal meal expense will be reimbursed to the maximum of reasonable costs actually incurred or the savings in your fare, whichever is less. Any such travel arrangements must be communicated before your scheduled travel to the appropriate ABET staff director.*

2. Meals - Official Guests

Original itemized receipts must be provided; credit card slips with just the totals are unacceptable. Expenses are not to exceed the amounts listed in previous section. The expense report should include the names of guests and the purpose of the meeting at which hospitality was extended. With regard to meals and lodging, it is safest to utilize your personal credit card. ABET makes every effort to process expense reports for reimbursement within ten (10) working days from date of receipt.

SECTION H – Transportation

1. Tolls and Parking

Reasonable expenses incurred for tolls and parking fees while using a personal automobile on ABET-authorized travel will be reimbursed. Receipts should be obtained and attached.

2. Mileage Allowance for Personal Cars

Actual ABET-related mileage costs for personal cars will be reimbursed at the official IRS rate in effect when the travel commences. The mileage allowance covers all costs associated with the operation of a personal vehicle including but not limited to gasoline, maintenance, insurance, etc. The number of miles driven must be recorded on the line for “Personal Auto Mileage.”

Note: The amount of mileage reimbursement shall be the lesser of the actual automobile mileage allowance or the total of costs that would have been incurred had the traveler opted for air travel. The expenses that will be factored into the cost of air travel will be: roundtrip mileage from airport to residence, parking, and regular coach airfare provided by ABET’s travel agent. ABET will not reimburse other expenses, such as additional meals and lodging required as a result of driving.

3. Taxi and Bus

Travelers on ABET business are strongly encouraged to use airport buses/shuttles or the least costly form of transportation available to reduce expenses. Receipts are to be obtained wherever possible.

Expenses for individual trips exceeding US\$25 must be supported by receipts.

4. Rental Cars

Car rental expenses submitted to ABET for reimbursement must be booked via ABET’s travel agent. This can be done while booking air travel or as a separate request if air is not necessary for your trip. This will ensure that ABET is listed in the rental agreement for insurance purposes. Volunteers shall not accept additional insurance coverage offered by dealers as it is not necessary. Car rentals should be coordinated with other travelers to the same location. Carpooling is encouraged. The above Mileage Allowance cannot be claimed for rental cars.

SECTION I – Rail Travel

Rail travel should be booked on the lowest fare available, such as the economy or coach rate. ABET encourages its travelers to use ABET’s travel agent to book rail travel.

SECTION J – Receipts

Detailed receipts must be submitted with your expense report. The receipt must be itemized. **A credit card receipt showing only the total charged is unacceptable.**

If original receipts cannot be obtained, the traveler must attest to that by completing and signing the Unsupported Travel Expense Form, which must be submitted with the Expense Report. The traveler should record the expense to the best of his or her recollection. ABET reserves the right to deny reimbursement of any unsupported expenditures over US\$25.00.

SECTION K – Travel Involving Non-ABET Business

You may use ABET's travel agent for personal or non-ABET related business travel, provided that you make arrangements for personal payment with the ABET's travel agent. Non-ABET related business shall not be billed to ABET.

SECTION L – Insurance Coverage

In addition to travel insurance provided by American Express for all travel booked through ABET's travel agent, ABET volunteers are covered by a blanket insurance policy while engaged in ABET business. This policy provides an accidental death benefit of \$100,000 and medical expenses for accidents up to \$5,000. Travel by private aircraft is not covered by either of these policies, and ABET incurs no liability for travel by private aircraft.. Insurance coverage is subject to change without notice. Any questions regarding coverage or claims should be referred to the ABET Business Office.

SECTION M – Miscellaneous Expenditures

1. Telephone and fax expenses

Reimbursement is limited to ABET-related calls and messages. Calls placed from home telephones must be supported by copies of bills, with the ABET-related calls marked, in order to be eligible for reimbursement. Travelers are encouraged to use calling cards to reduce hotel telephone charges.

2. Tips & Gratuities

Reasonable tips and gratuities will be reimbursed. Those related to meals must be included with the cost of the meals and should not exceed 20% of meal cost.

3. Other

Reasonable and necessary laundry and valet charges during travel will be reimbursed for travel of five (5) or more consecutive days on ABET business.

Expenditures for personal items such as medicine, personal care items, newspapers, movies, and entertainment will not be reimbursed. Please record other valid miscellaneous expenses using the "other travel expenses" line option.

4. International Currencies:

When there is international travel and the expenditure is in foreign currency, such as through a credit card, please submit these expenses after you have been notified of the actual U.S. dollar amount and the exchange rate during the time of your travel is noted. ABET strongly recommends that all travelers use credit cards for expenses incurred during international travels.

SECTION N – Expense Report

Totals by category and by day must be calculated. The expense report must be completed and proper approval(s) obtained (Team Chair or Director). The assignment of expenses to specific expense categories will be entered by the ABET staff.

When submitting the expense report for processing to ABET, all receipts should be submitted with the report. Please keep a copy of the expense report and attachments for your records. In the event of

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discrepancies, a copy of the report will be returned via an e-mail notification or mail service with or without the expense reimbursement check, depending on the nature of the discrepancy.

For expedited reimbursement of expenditures, ABET encourages volunteers to submit expense reports electronically using <http://expenses.abet.org>. ABET also offers ACH payment options depositing funds directly into a given bank account number. To take advantage of the feature described above, please complete the requested information by logging into your personal “MyABET” account found at www.abet.org/volunteers.

ALL EXPENSE REPORTS SHOULD BE COMPLETED WITHIN TEN (10) WORKING DAYS AFTER RETURNING FROM YOUR TRIP. EXPENSE REPORTS SUBMITTED MORE THAN SIXTY (60) DAYS AFTER THE END OF TRAVEL WILL NOT BE REIMBURSED.