

Emory University Travel & Expense Policy Changes

New policies effective 2/14/13

Policy Category	Old Policy	New Policy
Direct Bill Airfare	<ul style="list-style-type: none"> • Airfare can be direct billed to smartkeys • Airfare can be purchased using corporate card or personal funds • Airfare for all Emory employees must be booked using Emory travel vendors 	<ul style="list-style-type: none"> • As of 9/1/13 airfare may no longer be direct billed to smartkeys • Corporate card will be the preferred method for purchasing airfare and will be stored in traveler’s Travelocity Business profile • Personal cards can still be used to purchase airfare • Airfare for Emory employees must be booked using Emory travel vendors
Expense Reporting and Documentation	<p>Receipts:</p> <ul style="list-style-type: none"> • Original receipts required for all expenses • Summary receipts for meals under \$25 allowed, itemized receipt and summary receipt required for meals over \$25 • Taxi receipts required for any expense over \$25 	<p>Receipts:</p> <ul style="list-style-type: none"> • Hotel, air and rental car receipts will always be required, regardless of amount • Corporate Cards – receipts will not be required for items less than \$75 (except air, lodging and car rental) • Personal Funds – receipt requirements prior to 2/14/13 will be applied
	<p>Currency Conversion:</p> <ul style="list-style-type: none"> • Foreign currency receipts should include supporting documentation indicating the US dollar equivalent amount based on the currency exchange rate in effect on the day the expense was incurred 	<p>Currency Conversion:</p> <ul style="list-style-type: none"> • Corporate Cards – no further documentation required • Personal Card – a copy of the credit card statement serves as conversion rate documentation • Cash/Check – currency conversion documentation from online conversion websites such as XE or OANDA. Only one conversion rate per 7 days is needed
	<p>Lost Receipt Affidavit:</p> <ul style="list-style-type: none"> • Lost receipt affidavits should be used for missing receipts or receipts that do not provide sufficient information • Credit card statements should accompany lost receipt affidavits for credit card purchases • A copy of the canceled check should accompany a lost receipt affidavit for expenses paid by check 	<p>Lost Receipt Affidavit:</p> <ul style="list-style-type: none"> • Lost receipt affidavits are no longer required • For corporate card charges missing a receipt (above \$75 or for airfare, lodging or rental car), you will check the “missing receipt” box on the expense line and provide an explanation • For personal card charges you will check the “missing receipt” box and provide an explanation. <u>You will also be required to provide your credit card statement showing the charge.</u> • For cash purchases, missing receipts <u>will not be reimbursable.</u> The traveler is required to obtain a copy of the receipt.
	<p>Paper Receipt Retention:</p> <ul style="list-style-type: none"> • Departments are required to retain original paper receipts for 1 year 	<p>Paper Receipt Retention:</p> <ul style="list-style-type: none"> • Once original paperwork is scanned and uploaded to an expense report, users are only required to retain electronic scanned files until the report is reimbursed • There is no requirement that receipts be stored once the expense has been reimbursed, unless additional retention is required by the sponsoring agency

Emory University Travel & Expense Policy Changes

New policies effective 2/14/13

Policy Category	Old Policy	New Policy
Rental Cars	GPS: <ul style="list-style-type: none"> • Non-reimbursable 	GPS: <ul style="list-style-type: none"> • GPS rental from a rental car agency is now reimbursable
Meals	Spending Guidelines: <ul style="list-style-type: none"> • None 	Spending Guidelines: <ul style="list-style-type: none"> • Reimbursement for meals using actual receipts should not exceed \$100/day except in rare circumstances • If reimbursement exceeds \$100/day, further documentation or justification may be requested from the Chief Business Officer or his/her designee
	Highest Ranking Individual: <ul style="list-style-type: none"> • None 	Highest Ranking Individual: <ul style="list-style-type: none"> • The highest ranking individual from the hosting department/unit should incur the expense when paying for a group business meal
	Per Diem: <ul style="list-style-type: none"> • Domestic Travel – \$50/day, prorated for less than a full day’s travel • International Travel - \$50/day or US State Department Per Diems, prorated for less than a full day’s travel • Proof that conference/event did not supply any meals 	Per Diem: <ul style="list-style-type: none"> • Domestic Travel – No per diem allowed on domestic travel • International Travel – No per diem allowed on conference travel • International Travel – Per diem rates should match the US State Department (M&IE) rates, which are based on their fiscal year and vary by city • International Travel – Per diem rates now include Meals, Incidentals & Expenses <ul style="list-style-type: none"> ○ Meals – breakfast, lunch and dinner and related tips and taxes are covered by per diem ○ Incidentals – include fees and tips given to porters, baggage carriers, bellhops, hotel maids, stewards or stewardesses and others on ships, hotel servants in foreign countries and transportation between places of lodging or business and places where meals are taken • Per diem must be prorated to allow for partial days of travel or non-individual meals