**Important to Know About Business Travel in General**

With increasing number of traveling employees we have to be cognizant of our travel costs for our clients as well for [AGENCY]-related trips.

What is billable travel? Any travel on behalf of a client to perform work for them as directed.

What is non-billable travel? Non-billable travel includes professional development, business development, conferences (SHSMD, Becker’s, etc.), retreats, and trips to Nashville and Chicago offices that are not client related. In short, any travel not billable to a client – thus the firm pays for it. That type of travel is the primary focus of these guidelines.

Before booking non-billable travel, please check with a partner to approve travel and estimated cost. Your travel will not be booked by [AGENCY] until it’s approved.

Please remember when booking your flight to confirm with your team members that they will be in town. We want you to feel productive and part of the team when visiting the Barn or Chicago.

Coach accommodations are recommended in all cases. Tickets purchased will be non-refundable. For Southwest, we will purchase the middle “Anytime” fare as much as possible.

You will be asked to fly from the most economical airport in your area. The designated airport will be selected based on the airfare prices at the time. You will be reimbursed for taxi/rail to and from the airport.

In all air travel, both airline and route should be selected, in addition to timetable, based on minimizing the cost of the tickets.

All flights will be paid for on the [AGENCY] company credit card. Please do not use your personal credit card. All hotel and rental cars will be held on the [AGENCY] company credit card but in most cases you are responsible for payment. Keep track of your own receipts for reimbursement.

A “[AGENCY] Office Visit” is travel to Nashville or Chicago.

Any loyalty rewards points for hotels, car rentals and airlines are for staff to keep for personal use.

**Flight Change Fees/Changing Flights**

The airlines are charging more for changing flights. The cost on some airlines is now $250 or more to change a flight.

If a client needs you to stay later, changing your flight isn’t an issue – the firm will bill them for it.

If you finish early and want to get home earlier (a client visit or [AGENCY] office visit), the flight time difference will be a major factor in approving the flight change.

For example, if a flight gets you home three hours or less than your original flight arrival, it’s not justifiable to charge the firm or the client for a change fee (and in most cases, we wouldn’t charge the client a change fee if the change is not at their request). If it’s three hours or more, then a flight change is justifiable on a case by case basis. If you can depart earlier than planned and want to avoid a fee, it is best to go to the airline gate and attempt to go standby – it is the gate agent’s discretion whether to charge a fee for standby passengers. With SWA, this usually isn’t an issue.

Unless the trip is a certainty, to prevent unnecessary change fees, please do not book your non-billable travel more than two weeks ahead of your trip. If your trip has a high probability of being changed or cancelled, please wait to book within a three day period.

If you have a flight credit (remaining value on a ticket) for a previously cancelled trip, your next non-billable trip will be booked on the airline with the flight credit, if possible.

You must notify [AGENCY] if your trip gets cancelled for any reason or if you miss your flight. If you will not make your flight, let [AGENCY] know before it departs. In case of cancellation, check with the airline to verify that you were not automatically rebooked on another flight. If the airline books you on another flight and you don’t take it and don’t notify the airline, the firm will be charged. Lastly, hotels have cancellation notices and will charge the reservation credit card for no-shows or late cancellations (often 24-hours in advance).

**Travel Receipts**

Everyone is responsible for collecting their own receipts and keeping up with their expenses when traveling for a client or for [AGENCY] non-billable travel. If you lose your receipt, go online to the hotel chain or rental car company, enter your information and get a receipt or call them directly. With more than 20 employees on the road, collecting travel expenses for everyone is not someone else’s responsibility.

Please include non-itemized receipts for expenses in order to receive reimbursement.

In terms of writing on the receipts to indicate how they should be billed, simpler is better. Do not write anything except the name of the client (for billable) or [AGENCY] (non-billable). The actual receipts go to the client, so what you write, they will see – or [AGENCY] spends time whiting it out.

**Ground Transportation / Rental Cars**

If you have a membership with one of the rental car companies, let [AGENCY] know your rewards number and [WE] will book your car at your preferred rental company. If you are not enrolled in rental reward/membership, [AGENCY] has a preferred agreement with Avis.

Vehicle rental will be based upon most cost-effective class that satisfies requirements for the trip. In other words, no luxury car upgrades – particularly on client-related travel. A midsize car is preferred unless there are several employees traveling together.

Please refill the car fuel before returning it to the airport to avoid the $9+ per gallon refueling fee. Do not prepay for a full tank at the time of rental unless you’re going to use most of it during travel.

Navigational equipment (NeverLost/Garmin) is an approved addition to the rental.

Some clients prefer you use a certain car company when traveling for them. You will be required to use their preferred car rental company.

**Personal Vehicles**

If you drive for a [AGENCY] activity from a remote distance, your business mileage, which excludes your daily commuting mileage, will be reimbursed at the current IRS mileage reimbursement rate. Likewise, if you drive your personal vehicle to a distant client, you will be reimbursed at the current IRS mileage reimbursement rate (You may also choose to rent a car to drive to a distant client. If so, you will be reimbursed the rental car rate). There is no mileage reimbursement for driving to/from your local airport.

**Transportation to/from the Airport**

When visiting the Chicago office, you are encouraged to take the L, except later at night. It is $2.25 from Midway to the Loop or $5 (or less) from O’Hare to the Loop. That’s why our office is located with easy access to the Blue and Orange lines. You can buy a pass at the kiosk or, if you have a credit card with the wireless wave symbol on it, you can just touch your card to the entry gate.

If you do not own a car that you can drive to and from your home airport and leave it parked there during travel, or cannot take public transportation to access the airport, let [AGENCY] know and we will discuss alternatives.

**Billing**

The firm bills clients for travel time. Do not reduce your travel hours arbitrarily. Turn in all the hours for travel. At the end of the month, the partners and account leads go through the billing for accuracy and hours for travel can/will be trimmed at that time, if needed.

**Meals**

While traveling, reasonable beverage and meal expenses are permitted. Room service is reimbursable up to the cost of a normal hotel meal. Tips are reimbursable. Be sensible about your service tips with a maximum tip being 20% of the total.

Please submit the original non-itemized receipt/credit card slip. If you are submitting your receipts to be billed to the client, you cannot have itemized alcoholic beverages on the receipts. Some clients do require itemized meal receipts. In those cases, split the alcohol off from the food receipt and submit it separately for firm reimbursement.

Many of our clients have per diem rules for meals. Please follow those guidelines on client receipts.

**TSA**

If you travel often, you are encouraged to sign up for TSA pre-check to speed you through the security process and ensure the travel team can navigate the airport in a timely manner. With this updated version of the travel policy, the firm will reimburse you the cost of the TSA or Global Entry application fee.

**Miscellaneous Expenses**

The following list of expenses, in addition to any noted above, will be reimbursed for business travel purposes:

* Hotel room internet connection
* Airline in-flight wifi connection
* Ordering an in-room movie at the hotel
* Occasional and reasonable raiding of the room mini bar
* Airline baggage check fees
* Airport parking (consider an alternative to valet if your trip is more than 24 hours)
* Small cash tips for hotel baggage handlers, valet parking attendants, etc.
* Excess baggage charges for materials or equipment

If any staff member elects to extend their stay for firm-related travel or on a client trip for personal reasons, that is fine. However, you are responsible for any additional costs incurred including higher plane fare related for extending stay, all meals, all additional rental car fees and all additional hotel nights and change fees.

**[AGENCY] Does Not Reimburse for the Following**

* Mileage to and from your home airport (this includes client trips)
* Hotel phone bills except in cases where you otherwise have no cell service (It is recommended to use your cell phone because [AGENCY] already reimburses you for your cell phone.)
* Speeding tickets, parking tickets, bail bondsmen (well, unless the arrest was the client’s fault)

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