

**NEWSLETTER**

**TO:** WM Colleagues  
**FROM:** LaDonna Brown, Travel Program Manager  
**SUBJECT:** **IMPORTANT** - *Travel Program Updates*  
**DATE:** September 14, 2023

Dear Colleagues,

I hope this message finds you well and that you are gearing up for the new semester with enthusiasm and anticipation. As the majority of you are back on campus, I wanted to take this opportunity to connect and share some important updates from the Travel Team.

**NEW Chrome River Training, User Manuals and Quick Guides**

We're thrilled to announce some exciting documentation developments in our department that will enhance your travel experiences. Our dedicated team has been hard at work to make your business trips and academic journeys smoother and more efficient. We are pleased to announce that Chrome River Training resources are now accessible via the Travel Website's dedicated Chrome River Tab: <https://www.wm.edu/offices/financialoperations/travel/chrome-river/>.

**What is new?**

User Manuals:	Approval Manual:	Quick Guides:	Flow Charts:
The User Manual is a comprehensive document designed to aid users in understanding and navigating through Chrome River. It offers detailed instructions and guidelines on system operations and performing various procedures within the system.	The Approval Manual is specifically tailored for users responsible for approving Pre-Approvals and Expense Reports within the system. If you serve as a supervisor of an employee, CR Budget Approver, International Approver, or OSP Approver, it is essential to review this manual.	Quick Guides are concise 1–2-page documents that provide step-by-step instructions on how to create various types of documents or expenses within Chrome River.	Flow Charts are visual diagrams that illustrate the approval pathways for Pre-Approvals, Expense Reports, and Cash Advances within the system. Understanding these flow charts will help you navigate the approval processes efficiently.

We encourage all users to take advantage of these resources to maximize your proficiency in using Chrome River for your travel-related tasks. Should you have any questions or require further assistance, please do not hesitate to reach out to the Travel Office.

**NEW Requirements for Travel to Europe Coming Soon**

Beginning in 2024, citizens from over 60 visa-exempt countries, including the U.S., will be required to obtain a travel authorization to enter most European countries. ETIAS requirement will be coming in late 2023, and the requirement for entry starting in January 2024.

- The authorization will cost 7 Euro and will be linked to your US Passport, done in advance of travel.
- ETIAS trips to European countries < 90 days
- Trips over 90 days are still required to obtain Schengen Visa in lieu of the ETIAS.

For more information, click [HERE](#).

**Electric Vehicles (EV) Reimbursements**

An Electric Vehicle (EV) is defined as a vehicle powered by an electric motor drawing electricity from a battery and is capable of being charged from an external source. At W&M, we recognize the importance of sustainability and the adoption of EVs as an eco-friendlier mode of transportation.

The university's reimbursement policy for vehicle rentals is as follows: (1) The university will reimburse economy class rentals by default. (2) Exceptions may be considered when there is a justifiable reason for renting a larger vehicle. An example of such justification is when three colleagues are traveling together for a conference.

<b>What happens when you rent an electric vehicle?</b>
If an EV rental is chosen, please be aware that it will be considered a luxury rental. Consequently, reimbursement for the EV rental will be limited to the allowable economy car amount as per our policy.
<b>What if the university purchases an EV vehicle?</b>
If a department purchases an Electric Vehicle (EV) as a State Vehicle for departmental use, we kindly request that you notify the Travel Office. This notification is crucial for us to maintain an accurate record of State Vehicles that are EVs.
<b>Charging Station Expenses:</b>
For university owned EVs, expenses related to charging at charging stations can and will be reimbursed using the "Fuel" expense category within Chrome River. This ensures that the costs associated with maintaining and operating EVs are appropriately accounted for.

We appreciate your cooperation in adhering to these guidelines and supporting our commitment to sustainability. If you have any questions or require further clarification on this policy, please do not hesitate to contact the Travel Office.

### **Third-Party Lodging (Airbnb, VRBO, HomeAway, Placemakr, Front Desk, etc)**

There are many new third-party companies/vendors that are emerging daily and have bookings for “hotel like” rooms. This is a reminder that Third-Party lodging bookings such as Airbnb, HomeAway, Placemakr, Front Desk, and many more are not allowable. Please review the Third- Party Lodging Policy for a refresher:

<https://www.wm.edu/offices/financialoperations/announcements/thirdpartylodging.php>

How can you tell? If the lodging booking has a “cleaning” fee, it is a third-party booking and is not allowable, unless it falls within the policy above. If you are unsure of a booking, please reach out to the Travel Office prior to booking to ensure the lodging is allowable. There are no exceptions to this policy and reimbursements will be disallowed.

### **Other Important Policy Reminders**

<b>WIRE reimbursements for Travel Reimbursements in Chrome River</b>	<b>Driving vs. Flying Policy</b>	<b>Airline Seating Classes</b>
Chrome River does not have the functionality to process travel reimbursements as a Wire. It is not recommended to offer a Wire payment to a guest for travel-related expenses. If a Wire is the <u>only</u> option for payment, please reach out to the Travel Office directly and we will send you the instructions and procedures for getting a guest paid via Wire. Wire transactions through this process are only allowable for international guests. All other guests are reimbursed in Chrome River by check for travel reimbursements.	If a traveler opts to drive their personally owned vehicle (POV) rather than flying, a cost comparison must be obtained to show that it was cheaper for the traveler to drive versus fly. If the comparison shows that flying was cheaper than driving, the traveler can only request the Fleet Rate for the mileage driven on the university trip or the cost of the airfare comparison- whichever is greater. The comparison must be attached to the expense at the time of the reimbursement request.	The Travel industry is vastly changing, especially with airlines and their new seating class codes and classifications. The Travel Office is researching and continuously trying to keep up with the newest and most updated seating classifications. Please use the airline’s website to ensure you are booking a seating class within our policies. If you are unsure or if a booking is unclear, please reach out to the Travel Office prior to booking for us to assist in ensuring that the airfare class is within our university travel guidelines for Coach/Economy or Business Class seating.



## Business Meal Allowable Reimbursements and Categories

As part of our ongoing commitment to maintaining the highest standards of corporate governance, we are conducting a review of our business meal practices here at W&M. This review is intended to serve as a reminder of our policy regarding allowable and disallowable activities related to business meals.

In today's dynamic business landscape, fostering professional relationships and conducting productive discussions often occurs over shared meals. However, it is of utmost importance that we ensure our meal practices align with university values and policies, promoting transparency, fairness, and responsible use of university resources.

Functions or events which are considered appropriate for foods and beverages are listed in the 5 allowable business meal types below. **The Business Meal Policy applies to all university payment mechanisms on campus including Chrome River, America-To-Go, SPCC, and buyW&M.**

### Here are the 5 allowable business meal types:

(1) Internal Training and Retreats		(2) Business Meal Involving External Parties	(3) Events with Students	(4) Retirement and Appreciation Events		(5) Meals for One University Employee
Internal Training	Retreats			Retirement Events	Appreciation Events	
Internal training refers to the process of providing education, skill development, and learning opportunities to employees within an organization. This type of training is conducted by the organization itself and is designed to enhance the knowledge, capabilities, and performance of its workforce. Internal training programs can cover a wide range of topics, including job-specific skills, compliance with company policies and procedures, leadership development, or communication and teamwork.	Employee retreats refer to organized on-site/off-site gatherings or events arranged by a department for their employees. These retreats are designed to provide a break from the usual work environment and routine, offering participants a chance to engage in team-building activities, professional development, and bonding. These retreats may involve workshops, seminars, recreational activities, and discussions aimed at improving teamwork, communication, morale, and overall job satisfaction among employees. To optimize cost-effectiveness, it is encouraged that retreats take place at properties either owned or leased by William & Mary.	Business meals involving external parties refer to dining occasions in which individuals or groups from the university and external participants come together for the purpose of discussing and conducting business-related matters.	Events with students primarily serve as opportunities to enhance their educational and social experiences. These gatherings, often organized by the departments or student associations, aim to foster a sense of community and engagement among students. The primary purpose of such events is to provide a platform where students can interact with their peers, faculty, and staff outside of the traditional classroom setting. These events can take various forms, including academic conferences, workshops, cultural festivals, and extracurricular activities.	Retirement events are gatherings or celebrations held to mark the end of an individual's working career and their transition into retirement. These events are typically organized to honor and recognize the retiree's contributions, accomplishments, and years of service in their profession or occupation.	Events for Appreciation events for employees are special occasions organized by a department or university to express gratitude and recognition for the contributions, hard work, and dedication of their staff members. These events are designed to acknowledge employees' efforts and accomplishments, boosting morale, motivation, and a positive work environment. These events are typical for a group appreciation NOT individual employee recognition or appreciation.	If an employee is meeting with a non-employee who is covering his or her own business meal expenses, the W&M employee may be able to receive reimbursement for their meal. Very specific situations only. <b>(Prohibited on SPCC)</b>



	However, retreats held at off-campus locations require advance written approval in the form of a Travel Authorization from authorized approver.					
<b>Examples:</b> Training session for faculty/staff. Workshop training sessions, Professional Development Training	<b>Examples:</b> Annual Planning Retreat, Leadership Retreats, Professional Development Retreats	<b>Examples:</b> Job Candidates, Potential Donors, Guest Speakers,	<b>Examples:</b> Club Sponsored Events, Commencement Activities	<b>Example:</b> Employee Retirement only	<b>Examples:</b> Faculty/Staff Welcome Back Receptions, Year End Event, Staff appreciation events, annual faculty/staff picnics, Employee award/recognition receptions	<b>Examples:</b> An employee meeting with a potential donor who pays for their own meal during a university business meal.

Please see the [Business Meal Chart](#) for additional clarification and requirements for Business Meals on funding, how often can you host the activity and others.

Now that we have clarified when it is appropriate to host a business meal event, it is essential to be aware of the activities that are strictly **NOT ALLOWABLE** and do NOT meet our policy standards.

### Unallowable Business Meal Expenses

Most of the activities that are unallowable are mostly Employee-Only Meals. These include (actual examples):

- Lunches between supervisors and employees
- Regularly scheduled meetings for university employees.
- Faculty and/or staff department meetings
- Group Planning Meetings
- Round Table Discussions
- General discussion meetings between faculty and staff
- Mentor/Mentee meal between university employees
- A one-on-one appreciation meal
- A new employee meal (breakfast, lunch, or dinner)
- A farewell gathering for an employee that is NOT retiring (an employee departing from the university)
- Employee monthly birthdays, weddings, and anniversaries
- Holiday Parties/ Gatherings

### Final thoughts



The success of our travel policies and initiatives greatly relies on the adherence to well-defined policies and procedures that ensure safety, transparency, and efficiency. We are thrilled to acknowledge that W&M has consistently stood by our side, aligning with these principles, and demonstrating unwavering support.

Thank you for all you do to ensure the success of our team! As always you can contact your Travel Team: LaDonna Brown, Travel Program Manager and Alexis Brown, Travel Account Specialist.