

Indiana University Office of Procurement Services

STANDARD OPERATING PROCEDURE

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| SOP NO: | SOP-TVL-06 |
| SUBJECT: | Personal Time |
| SOURCE: | University Travel Management Services |
| ORIGINAL DATE OF ISSUE: | 09/21/2022 |
| DATE OF LAST REVISION: | N/A |
| DISCLAIMER: | The information provided in this Standard Operating Procedure (SOP) is designed to provide helpful information on this procedure. Travel Management Services reserves the right to determine on a case-by-case basis if a SOP should be adjusted for a particular situation. This SOP is not intended to cover every situation nor can it anticipate specific circumstances. |
| RATIONALE: | A business trip includes round trip travel days and all days/allowable travel-related expenses incurred while conducting IU business in between. In the context of business travel, personal days are any days that the traveler is gone and is not conducting business activity within the scope of the trip authorization. Personal days must be accounted for in the Chrome River travel reimbursement expense report. IU will not reimburse or pay for lodging, per diem, or any other expenses on personal days. |
| PROCEDURES: | <p><u>Business and personal days in Chrome River:</u></p> <p>It's important to distinguish between business days and personal days when entering trip dates on your report. Travel policy allows for traveling one day before the event you're attending, and one day after. These travel days are considered allowable business days.</p> <ul style="list-style-type: none"> • For example: IU employee Frodo Baggins is attending a conference in Seattle. Policy allows Frodo's business travel to begin one day before the conference and end one day after. <ul style="list-style-type: none"> ○ Conference dates: June 2 through June 5 ○ Possible Travel Days: June 1 and June 6 <ul style="list-style-type: none"> ▪ Chrome River Trip Begin Date: June 1 ▪ Chrome River Trip End Date: June 6 <p><u>Personal Time Scenario</u></p> <p>Frodo wants to spend some time visiting family in Seattle while he's in town. Frodo can add personal days before his conference, meaning he'd need to fly out to Seattle days prior to his conference, or, after his conference, meaning he'd fly back to Indiana however many days after the conference ends.</p> <ul style="list-style-type: none"> • For example: Frodo decides to add personal days <i>after</i> the conference. <ul style="list-style-type: none"> ○ The day of Frodo's flight back to Indiana will be considered a Business Travel Day, despite having added personal time between the conference |

ending and his departure from Seattle. Frodo must travel home from the conference regardless of the personal days, so IU Travel policy allows this.

Frodo's calendar might look like this:

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|----------------------------|---|-----------------------|-----------------------|---|---------------------|--------------|
| June 1 | June 2 | June 3 | June 4 | June 5 | June 6 | June 7 |
| Business Travel day | Conference starts 8 am *Business day* | *Business day* | *Business day* | Conference ends 6 pm *Business day* | Personal days begin | Personal day |
| June 8 | June 9 | June 10 | June 11 | June 12 | June 13 | June 14 |
| Personal day | Personal day | Personal day | Personal days end | Business Travel day | | |

Expense Reporting:

Trip dates encompass the entire trip, meaning personal days within the defined *Trip Start Date* and *Trip End Date* are included on the Chrome River report. If the personal dates were split throughout the trip, check the box next to *Additional Personal Time* and enter the additional dates. Make sure you've entered all dates correctly before adding expenses. Remember: a date is either personal, or business, it cannot be both.

A personal date entry will prompt an alert anytime expenses are claimed on that date. If the dates are entered incorrectly, you may need to go back and adjust the dates and expense lines as needed or log comments to ensure accuracy.

When reporting these expenses in Chrome River, the summary page of Frodo's expense report would look like this:

The screenshot displays the Chrome River interface for reporting expenses. On the left, a summary card shows the report title 'BAGGINSF Seattle 6/1 - 6/12 w/ personal days' and a total amount of 0.00 USD. On the right, the 'Expenses For Frodo Baggins' form is visible. Key fields include:

- Report Name: BAGGINSF Seattle 6/1 - 6/12 w/ personal days
- Travel Type: Domestic
- Trip Start Date: 06/01/2022
- Trip End Date: 06/12/2022
- Business Purpose: botanical research conference
- City / State / Zip: Seattle, WA - 98102
- Does trip include personal time?:
- Personal Time Start Date: 06/06/2022
- Personal Time End Date: 06/11/2022
- Additional Personal Time:

 Annotations with arrows point to the Trip Start and End Date fields, stating they are business days. Another annotation points to the Personal Time Start and End Date fields, indicating where to enter personal days. A note at the bottom left states that Chrome River will not allow reimbursements on specific dates if they are not properly categorized.

Flying to additional destinations on personal time

IU Travel policy covers the cost of round-trip airfare to and from a business destination. Occasionally, travelers will fly to additional destinations from their business destination while on personal time.

IU funds may not be used to purchase or reimburse personal airfare *unless* the cost of the flight to and from your personal destination is *less than* the cost of flying home from the original business destination. To substantiate this, you must perform a flight cost comparison between:

- a round trip flight from local airport and departure from the business destination and
- travel plans purchased that include personal segments.

This comparison must show flight costs no less than 30 days in advance of the flight. The cost of the more economical flight path will be the amount reimbursed. This search must be documented and attached to your Chrome River trip authorization and expense reports and approved by the funding fiscal officer or their delegate.

Example: Frodo, who departs from Indianapolis IN, attends a business conference in Seattle and wants to fly to San Francisco, CA for a personal trip afterwards. In order for IU to reimburse *any* amount of his flight, Frodo must provide documentation comparing the cost of a roundtrip flight from Indianapolis to Seattle, **and** the personal travel plans purchased, from Indianapolis, to Seattle, to San Francisco, back to Indianapolis. Whichever flight path is more economical will be the one reimbursed.

To substantiate his reimbursement, Frodo uploads a PDF containing a screenshot of economy flight options for roundtrip tickets for Indianapolis–Seattle. Frodo must also have proof of payment for the flight purchased for Indianapolis–Seattle–San Francisco–Indianapolis. Both must be present, and the more economical flight will be reimbursed.

Example:

- Flight purchased with personal travel plans involved from IND to Seattle, to San Francisco, to IND
 - \$650
- Roundtrip economy flight from IND to Seattle to IND on business days
 - \$500

The more economical flight, in this case the \$500 business-only flight, will be reimbursed.

Car rental insurance and ground transportation

Some expenses will need to be adjusted or prorated to account for personal time when creating your expense report, such as car rentals and parking fees.

IU only pays for daily rates, insurance, and damage waivers on IU business vehicle rentals. If you're renting a car for your trip and intend to keep it through your personal days, you are responsible for removing the IU paid damage waiver/insurance on personal days and adding your personal payment method to cover the additional dates and insurance for personal days. A personal payment method must be used to cover the cost of the vehicle on personal days and will not be reimbursed.

Lodging expenses & guests

IU will not pay for or reimburse lodging expenses for personal days. Furthermore, some rental companies will charge an additional rate if you have travel partners or other guests lodging with you. In this situation, for business days, only a single guest room rate for the individual IU traveler should be claimed for reimbursement. In the USA, one additional person doesn't usually incur extra costs at a traditional hotel, but you'll want to be conscious of extra charges in non-traditional lodging options and outside the USA.

Per Diem

Chrome River will not allow you to claim per diem on a defined personal day, but **remember: the last day of your trip is considered a business travel day**, thus a traveler can claim per diem on this date. The rate will be reimbursed at a pro-rated “travel day” amount.

Attempting to claim per diem on a personal day will cause an error that will not allow the expense to be submitted. When adding your Per Diem Wizard, enter the dates of the entire trip, and **Delete** the personal days.

The screenshot shows the Chrome River interface for an expense report titled "BAGGINSF Seattle 6/1 - 6/12 w/ personal days". The interface is divided into two main sections: a list of expenses and a detailed view of the selected "Meals - Per Diem" entry.

Expense List:

| DATE | EXPENSE | SPENT | PAY ME |
|----------------|-------------------|------------|------------|
| Sat 06/04/2022 | Meals - Per Diem | 79.00 USD | 79.00 USD |
| Sun 06/05/2022 | Meals - Per Diem | 79.00 USD | 79.00 USD |
| Mon 06/06/2022 | Meals - Per Diem | 79.00 USD | 79.00 USD |
| Tue 06/07/2022 | Meals - Per Diem | 79.00 USD | 79.00 USD |
| Wed 06/08/2022 | Meals - Per Diem | 79.00 USD | 79.00 USD |
| Thu 06/09/2022 | Meals - Per Diem | 79.00 USD | 79.00 USD |
| Fri 06/10/2022 | Meals - Per Diem | 79.00 USD | 79.00 USD |
| Sat 06/11/2022 | Meals - Per Diem | 79.00 USD | 79.00 USD |
| Sun 06/12/2022 | Lodging Room R... | 800.00 USD | 800.00 USD |
| Sun 06/12/2022 | Meals - Per Diem | 79.00 USD | 79.00 USD |

Personal days: DELETE

Business travel expenses

Total Pay Me Amount: 2,088.50 USD

Meals - Per Diem Details:

- Date: 06/06/2022
- Spent: 79.00 USD
- Description: (empty)
- Location: Seattle-King County, Washington (WA), United States
- Project Code: (empty)
- Organization Reference Id: (empty)

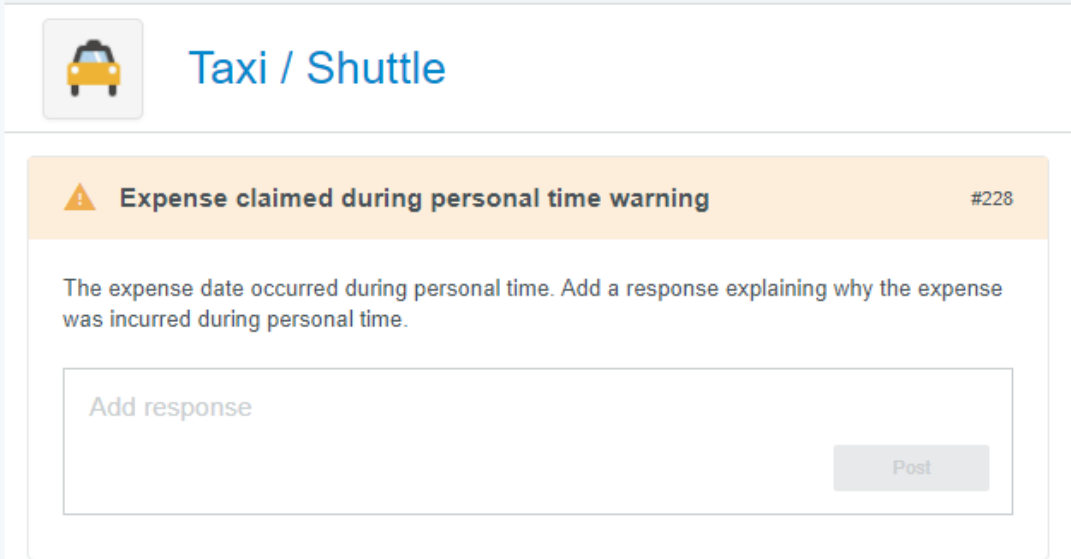
Personal time expenses violation #229

Cannot claim lodging or per diem within personal time dates.

Last travel day expenses & business expenses on personal days

Remember: the first and last day of your trip are considered a business travel day, thus expenses on these days are reimbursable even if you had personal time before or after the travel day. For example, ground transportation trips from the hotel to the airport at the end of your trip are reimbursable because they fall on a business travel day as specified in the dates of your trip.

Occasionally, business expenses will occur on personal days. In this instance, Chrome River will prompt you for a brief explanation on expenses incurred on personal days. Explain what the expense is and why it occurred during a defined personal day.

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| <p>DEFINITIONS:</p> | <p>Business trip - includes round trip travel days and all days/expenses involving IU business in between.</p> <p>Personal day - Any days that the traveler is gone and is not conducting business activity within the scope of the trip authorization.</p> <p>Business travel day – first and last day business day of the trip</p> <p>Business day – a day within the trip start and end dates that is for business purposes</p> |
| <p>CROSS REFERENCE:</p> | <p>https://policies.iu.edu/policies/fin-trv-01-travel-policy/index.html</p> |