

## Clarification regarding Policy 515 (Travel) and Policy 516 (Meals and Entertainment)

Dear CAAS & Extension Personnel,

We feel there is a need for clarification in regards to the Travel Policy ([#515](#)) and Meals and Entertainment Policy ([#516](#)). Specifically, we feel it is important to clarify when and how the University pays for travel or meal expenditures of a spouse, companion or family member(s). University policies [#515](#) and [#516](#) are clear on this subject and we encourage everyone to read them carefully as there can be tax implications to you personally.

### Travel

Policy 515 states, “The University is accountable for how public monies are spent, and expects that travel expenses will be scrutinized. Those who travel on behalf of the University hold a position of trust and authority, requiring the demonstration of integrity by judicious use of such funds.” It goes on to state: “For those occasions when it is determined that family/companion travel is **essential** or **beneficial** to the University for the accomplishment of a **bona fide business purpose**, University funds may be used to reimburse the family/companion travel expenses with approval by the appropriate Dean or Vice President. The following form is used to document the approval by the Dean or Vice President and to determine if the family/companion travel is essential or beneficial to the University.”

To ensure that this policy is strictly adhered to we are implementing the follow business practices effective immediately.

- All family/companion travel must be preapproved by the CAAS Dean/VP of Extension. This includes but is not limited to when a family member will be traveling as a chaperone or volunteer at a University sponsored event (e.g., overnight 4-H activity). This preapproval happens by filling out the University’s [Companion Travel Approval Form](#). Any after-the-fact family/companion reimbursements will not be paid and the family/companion would be responsible for his/her associated expenses.
- A TA/TR must be submitted for all approved family/companion travel. This TA/TR needs to be separate from the employee’s TA/TR. The family/companion will be reimbursed for using their own TR. There will be no reimbursements for any travel expenses that were not approved prior to the trip.
- If you use an “all card” to make meal and travel purchases for groups (e.g., 4-H youth events) the use of that card is limited to purchases for the kids only. Meal and travel expenses for employees, approved family/companion(s) should not be made on the “all card”. Rather, employees and your approved family/companion(s) should claim per diem or turn in itemized credit card receipts with your respective TA/TR. In some cases this means separate transactions for different people attending the same trip/event. This is not only appropriate but expected.
- Unapproved family/companion travel expenses should never be paid with University funds. A promise/agreement to “reimburse” the University does not justify an exception.

## Meals

Policy 516 states, “The entertainment expenses of the spouse of a guest, employee or the official host may be reimbursed as an **exceptional** expense provided such meals and entertainment serves a bona fide University business purpose. Participation in official functions that **require** the attendance of a spouse may be considered a bona fide business purpose. Fundraising events, alumni gatherings, community and recruiting events are examples of activities that may require the attendance of a spouse. Expenditures for spouse travel (meals, airfare, etc.) are generally not permitted.”

Only under rare occasions is it appropriate to purchase meals for an employee’s family/guest/companion. These occasions should be preapproved by the CAAS Dean/VP for Extension and the appropriate documentation attached to the meals and entertainment form in Workflow. Any pcard or EZ Buy transaction failing to list every employee or family member will not be approved and will be returned to the employee for further documentation. If it’s been determined that meals were purchased for family members and they weren’t preapproved, that transaction will be rejected and the employee will be required to pay those funds back to the University. This could also result in the employee losing pcard privileges. Rather than making a comprehensive list of approved functions, we are asking you to seek permission before you hold the event.

Our goal is to protect you and the University’s assets and resources. Following these simple procedures will keep us compliant with established USU policies.