

Salk Institute for Biological Studies

Supplier Travel Policy

Purpose and Compliance

Purpose

This travel policy provides guidelines and established procedures for Suppliers incurring business travel and allowable expenses on the Salk Institute's behalf. All Suppliers are required to follow this policy when allowed to bill the Salk Institute for expenses permitted by contractual terms.

Scope

The Supplier Travel Policy applies to all suppliers of the Salk Institute. Any reference to "Supplier" applies to all vendors, consultants and contractors.

Compliance

Suppliers are responsible for complying with the Travel policy. Approvers (Salk Institute managers/supervisors and the Finance Department) are responsible for authorizing travel and accurately reviewing expense invoices for compliance. The Salk Institute will reimburse Suppliers for all reasonable and necessary expenses allowed by contract while on authorized company business. The Salk Institute assumes no obligation to reimburse Suppliers for expenses that are not in compliance with the Supplier Travel Policy. All travel expenditures will be subject to audit.

Suppliers who do not comply with this policy may be subject to:

- Delay or withholding of reimbursement
- Termination of contracts due to breach

Travel Policy Questions/Contacts

Any questions, concerns or suggestions regarding the Supplier Travel Policy may be directed to the Accounts Payable Department:

Email: accountspayable@salk.edu

Travel Authorization

Travel authorization is given by the manager/supervisor of the specific business unit for the related contract. They will approve all vendor expenditures by manual expense invoice. Salk Institute managers/supervisors do not have authority to override the Institute's Travel Policy.

Spouse/Companion Travel:

The Salk Institute will not reimburse travel expenses incurred by a spouse or other individual accompanying Supplier on business.

All Supplier travel should be booked by the Supplier using the Supplier's credit card or other payment methods and shall not be direct billed to Salk. Suppliers may submit all expenses that have been agreed to in the contract and pre-approved in writing by the appropriate Salk manager/supervisor, to the Institute for reimbursement.

Domestic Travel

Airline Class of Service:

All domestic air travel must be in coach/economy class of service. Suppliers are expected to use the lowest practical non-stop direct airfare available. When a Supplier does not book the lowest available non-stop direct airfare, hotel or car rental offered, pre-approval is required with an explanation. This must be included with the travel invoice submitted for reimbursement. Suppliers are never allowed to fly on an airline with a higher fare in order to receive preferred frequent flyer miles or in order to upgrade to first class. This will be considered out of compliance.

Upgrades for Domestic Air Travel:

Upgrades at the Salk Institute expense are NOT permitted. Upgrades are allowed at the Supplier's personal expense.

Lowest Logical Airfare Definition:

Suppliers are expected to book the lowest practical airfare based on the following:

- Minimum 7-14 day advance purchase
- Flexibility in departure and arrival times
- Discount fares which are non-refundable or have cancellation/change penalties
- Use of alternative airports where applicable (i.e. Midway versus O'Hare in Chicago)
- Flights which are non-stop or connect en route

Suppliers are not expected to book connections unless it is a significant savings and time effective.

Airline Frequent Flier Programs:

Suppliers may retain frequent flier program benefits. However, participation in these programs must not influence flight selection, which would result in an increase in airfare beyond the lowest practical airfare as defined in the Supplier Travel Policy.

Lost Baggage:

The responsibility for retrieving and compensating travelers for lost baggage lies with the airlines. The Salk Institute will not reimburse Suppliers for personal items lost or stolen while traveling on business. Be sure to report any claims to the airline as soon as possible.

Denied Boarding Compensation:

Airlines occasionally offer free tickets or cash allowance to compensate travelers for delays and inconveniences due to overbooking, flight cancellations, changes of equipment, etc.

Suppliers traveling may volunteer for denied boarding compensation only if:

- Flying outside normal working hours
- A delay will not result in an interruption in, or loss of business

Suppliers who are involuntarily denied boarding should:

- Get rebooked on another flight
- Obtain a free voucher from the airline
- Keep the free travel for personal use

Overnight delays:

Should an airline delay necessitate an overnight stay, Suppliers must first attempt to secure complimentary lodging accommodations from the airline.

Travel Insurance:

Suppliers will not be reimbursed for travel insurance coverage.

Hotel Spending Guidelines:

Suppliers will be reimbursed for actual and reasonable hotel room costs. If the hotel rate includes free breakfast, any other breakfast expense is disallowed. Tips for hotel staff are reimbursable when confined to reasonable limits, as determined by the services required and received.

Hotel Cancellation Procedure:

Suppliers will be held responsible and will not be reimbursed for “no-show” charges. Suppliers should note that cancellation deadlines are based on the local time at the hotel. Cancellation deadlines are indicated on reservation confirmations.

Hotel Payment Procedures:

Hotel costs must be paid using the Supplier’s credit card.

The hotel bill will need to be broken out by categories such as, but not limited to room/tax, meals, internet, phone and parking.

Rental Cars

Rental Car Guidelines:

Suppliers should drive a car to their destination when driving is more cost and time effective than airline travel. Suppliers may rent a car when:

- It is less expensive than other transportation modes such as taxis, hotel shuttles, airport shuttles or airport limousines.
- Shuttle service is not available to/from hotel and airport.

Rental Car Categories:

Suppliers should book the following rental car categories:

- Compact
- Midsize/Intermediate

When picking up a rental car, Suppliers should:

- Check with the rental car agent for any promotional rates, last minute specials or free upgrades.
- Inspect the vehicle and report any damage found before the vehicle is accepted.

Rental Car Insurance – Domestic:

Suppliers must have made provisions for insuring rental cars against damage. Insurance coverage for rental cars is not reimbursable.

Rental Car Cancellation Procedures:

Suppliers are responsible for canceling rental car reservations. Suppliers should request and record the cancellation number in case a billing dispute arises. The Salk Institute will not reimburse cancellation charges caused by the Supplier.

Returning Rental Cars:

Every reasonable effort must be made to return the rental car:

- To the original rental location unless approved for a one-way rental
- Intact (i.e. no bumps, scratches or mechanical failures)
- On time, to avoid additional hourly charges
- With a full tank of gas or same amount as at receipt of car at pick up

Under no circumstances should the fuel option be purchased. The fuel option is the ability to return the car with an empty tank of gas and have the rental car company refill the tank with gas. Supplier must decline this coverage and refill the tank before returning the rental car, ensuring the gas receipts are submitted with expense invoice.

Rental Car Payment Procedures:

Unless otherwise instructed, rental cars must be paid using the Supplier's credit card.

Rental Car Accidents:

Should an accident occur, Suppliers are responsible for all reports and resolving any issues.

Other Transportation

Car Transportation:

Car transportation (taxi, Uber, Lyft) expense is reimbursable when needed to travel between business locations.

Car/Limousine Service:

Car/Limousine service is a non-reimbursable expense.

Personal Car Usage Guidelines:

Mileage for personal car usage by Suppliers is reimbursed at the current established rate by the U.S. Internal Revenue Service.

Meals

Personal Meal Expense:

Personal meals (breakfast, lunch and dinner) are expenses incurred by Suppliers traveling when dining alone on out-of-town business trips. Suppliers will be reimbursed for personal meal expenses. Lunch and dinner expenses should not be lavish or excessive. Snacks and beverages outside of meals will not be reimbursed. Gourmet dining will be considered excessive and not reimbursed. When dining, alcohol is not reimbursable and is considered a personal expense.

Tipping for meals:

Tips should be no more than 20% of bill. Any tips considered excessive will not be reimbursed. As a general rule, Suppliers should not tip more than they would on a personal trip and tip only on a level of service received.

Payment for meals:

Expense invoices must include itemized business meal receipt as well as total amount plus tip receipt.

Expense Reporting

Submitting an Expense Invoice:

All expenses should be submitted as soon as the business trip has concluded. All expense receipts should be attached to the expense invoice and sent to the appropriate manager/supervisor sponsoring the trip. **Expenses not filed for reimbursement within 90 days from the trip end date will not be reimbursed.** The Salk Institute will approve all expenses in accordance with the Institute's policy.

Documentation Requirements:

Suppliers must submit the following documents with the expense invoice:

- Air – itinerary or invoice including dollar amount paid and ticket number.
- Hotel - copy of hotel bill and proof of payment. Hotel bill should itemize each category of charge, i.e. parking, internet, room services.
- Car rental – rental car agreement plus credit card receipt or other proof of payment.
- Meals – all itemized receipts (cash or credit card transactions) and documentation of purpose.

All food and beverage must fall under meal guidelines and must have a receipt.

Expense invoices will be processed for payment within 7 business days upon receipt of approved invoice in Accounts Payable.