

SOG Services, Inc

Travel Expense and Reimbursement Policy

When traveling for business purposes, SOG Services employees should follow the steps below to make a travel request, pay for travel expenses, and request reimbursement for any out-of-pocket expenses.

Prior Approval

Prior to your travel, request approval for the trip and associated expenses from your supervisor. You should include an estimate of the total anticipated expenses for the trip. Document the approval in writing and keep this documentation to include with any reimbursement requests. You are not required to plan your travel through Concur; an email to your supervisor will suffice.

If you are including personal travel with your business trip, please follow university guidance in breaking out your personal travel cost as part of the prior approval process.

Booking Travel

Once approval is granted, use your SOG Services Ramp credit card for any advance payments as needed, including:

- Lodging
- Airfare
- Baggage fees
- Rental cars
- Registration Fees

Upload receipts for these purchases with a description of the business purpose of the trip in Ramp and include a cost code if applicable (for example, if traveling for a specific course).

Lodging

You may use any booking site to find and make reservations, but you should seek the most cost-effective travel and accommodations that meet your needs. In line with University policy, lodging rates that exceed 150% of the federal per diem rate will require justification. Find the relevant lodging reference rate here: <https://www.gsa.gov/travel-resources>

Meals

In line with University policy, SOG Services uses [federal per diem rates](#) to reimburse personal meal expenses while traveling. Per diem rates vary by date and location of travel. To look up the rate based on the destination and dates of travel, see here: <https://www.gsa.gov/travel/plan-book/per-diem-rates>

Personal meals while traveling should not be charged to your Ramp Card. Any personal meals charged to the Ramp Card will be deducted from your reimbursement.

Consistent with University policy, in most circumstances you are only eligible for meal per diem when you make an overnight trip. Partial day per diem is possible when the partial day is the day of departure or return for a trip, but it must be in conjunction with an overnight trip taken.

Reimbursement of meals outside of overnight travel is not typically permitted; however, with approval from the SOG Services Director or Treasurer, partial day per diem (for lunch and/or dinner) may be granted for one day trips where the return time is after normal business hours and/or demonstrates cost savings to the school.

Tax and tips for meals are included in the per diem rate. The cost of meals included in other related activities (registration fees, conference costs, hotel registration, etc.) may not be duplicated in reimbursement requests.

You may use your Ramp card to pay for Business Meals while traveling. Business meals are meals that are served to a group of people meeting for business purposes. See [SOG Business Meal policy](#) for more information.

**In special circumstances, at the discretion of SOG Services Director or Treasurer, per diem for lunch and/or dinner may be granted for one day trips where the return time is after normal business hours.*

Ground Transportation

Ground transportation should be conducted via the least cost method.

For rental cars, travelers are encouraged to use the University contract with EHI Direct (Enterprise) for their rental vehicle needs. Select the size of the vehicle that is appropriate for the number of passengers or the amount of baggage. Do not accept “upgrades” or insurance unless the price will remain the same. Insurance is included in the University’s rental agreement for domestic travel.

Taxis, rideshares (e.g. Uber, Lyft), car services and shuttles may be used as transportation for business purposes. Ramp cardholders should charge these costs to their cards and maintain all receipts.

When traveling in a personal vehicle, mileage eligible for reimbursement is measured from the closer of either the Duty Station (usually Knapp-Sanders) or point of departure to the final travel destination (and return). Mileage reimbursement is described below.

Mileage

When a personal vehicle must be used, the allowable standard IRS mileage rate will be used to calculate your reimbursement.

See the University policy on ground transportation for the current rate and further guidance.

<https://policies.unc.edu/TDClient/2833/Portal/KB/ArticleDet?ID=131471>

Combining Business Travel with Personal Travel

Obtain a quote for your trip as if you were simply traveling for your business dates/destinations of travel. If the desired itinerary is the same price or is less expensive, you're all set! If the desired itinerary is more expensive, however, then you will be responsible for the difference from the quote obtained above. Any difference in price which is owed to SOG Services will be repaid during the Reimbursement Request process described below.

Reimbursement Requests

Within 10 days of completing your trip, submit the following documents to the business office via the Ticketing System. Include the following additional documentation with your reimbursement request:

- [SOG Services Travel Expense Form](#)
 - Enter your per diem & mileage amounts and itemize any other out of pocket expenses on this form. This will be your reimbursement amount.
 - Use the [federal per diem tool](#) to calculate the total per diem reimbursement and attach a screenshot to your request.
 - Itemize all expenses paid via the SOG services Ramp Card to calculate a total trip cost. This is for record keeping only; you will not be reimbursed for any expenses paid via the Ramp card.
 - Make sure you sign the form in the signature field at the bottom.
- Documentation of supervisor approval for the trip (such as an email from your supervisor)
- Receipts for any business-related out-of-pocket expenses not charged to your SOG Services Ramp card. Receipts are not required when [per diem rates](#) apply (e.g., meals).
- Conference agenda, if applicable
- If this expense is covered by a special funding source, please provide documentation including agreements with the outside funder

Once received, the Business Office will review the materials and let you know if additional information is needed. Once finalized, the Business Office will issue a reimbursement check that can be mailed to you or deposited to your bank account via ACH (you will be asked to select your preferred method on your reimbursement form).

Non-Employee Travel

SOG Services may reimburse travel expenses for non-employees, including UNC SOG employees supporting SOG Services business activities and independent contractors/speakers. Non-employees should request reimbursement using the travel expense form described above and should include receipts for any out-of-pocket expenses.