**Travel Policy - FIS**

This travel policy is made up of five key sections:

1. Travel booking process
2. Expense categories
3. Non-reimbursable purchases
4. Expense reporting and reimbursement process
5. Travel support, safety and duty of care

**Section 1: Travel booking process**

In the second section of our free travel policy template, we’ve included everything employees need to know about where and how to book travel. Make travel arrangements for your employees or let them book for themselves—either way, this template will work for you.

* **How to book travel** – What is your approved process, method and/or platform for booking business travel? If your company use a platform to enable travelers to book within policy, include the name of your approved booking platform. Otherwise, write out the name and contact details of the company or person they’re supposed to contact in order to request a booking.
* **Approval process for senior management** - the approval process for c suite and senior members of staff will likely differ from that of other employees. Senior management might require approval from an executive, and executives might require sign-off from other c suite members. All of this must be included in your policy.
* **Use of loyalty programs** – Many companies don’t allow travelers to collect points for their personal loyalty programs. But if you trust your travelers to do the right thing, you can allow this and include a line in your policy like “Employees may not choose more expensive options only to get loyalty points.”
* **Leisure extensions –**Sometimes business travelers want to extend their trip into the weekend, or use up some of their vacation days. You should include rules around leisure extensions (or “bleisure”), such as what cost difference is allowable for return flights. It's important to outline what expenses you will cover and what you consider "personal expenses" for "personal travel". Make clear that these are additional costs that do not fall within the ambit of business expenses under your travel policy.
* **Traveling with non-employees** **-** travel expenses related to travel with spouses, family members, pets or anyone outside of the company are not normally eligible for reimbursement. These situations can be subject to approval if they are accompanying staff members for business reasons such as attending a conference or for a networking event.

**Section 2: Expense categories**

An important part of any expense policy and procedure is what employees are allowed to expense. This is a great way to make your travel policy more cost-effective and aligned with your business needs for this trip.

In the third section of our corporate travel policy template, we’ve broken up business travel expenses by common categories: flights, lodging, ground transportation, food and entertainment, and personal telephone usage.

Here’s the information to include in each expense category:

* Air travel
* Approved tool or method for booking
* Preferred vendors (if any)
* Rules on whether or not business class is allowed, such as for flights over a certain duration, or flights taken by employees of a certain seniority level. Highlight whether travelers should go in economy class or business.
* How many days in advance international flights must be booked
* How many days in advance domestic travel must be booked
* Accommodation
* Approved tool or method for booking
* Maximum nightly rates per city for hotel rooms
* Preferred vendors and negotiated rate details (if any)
* Rules on standard rooms and upgrades, for example standard rooms are required but room upgrades are allowed if offered at no additional charge
* Reimbursable hotel costs, such as parking
* Rules for booking Airbnb or apartment rentals
* Rail travel
* Approved tool or method for booking
* Type of train ticket allowed, such as economy
* Taxis and ride-sharing
* When taxis and ride-sharing is allowed, for example when public transportation isn’t viable
* Maximum amount per transaction
* Rental and personal car
* Type of rental car class allowed, such as compact or mid-size
* The number of employees expected to share a rental car when traveling together
* How much is reimbursed per mile or kilometer
* Conferences & events
* Expense reimbursement process for conference or event registration in cases where it was not pre-paid.
* Process for other conference or event related expenses such as business meals or anything not included in the registration cost.
* Food, travel and entertainment
* Reimbursable amount, per breakfast
* Reimbursable amount, per lunch
* Reimbursable amount, per dinner
* Alternatively, a daily maximum or per diem
* Personal meal expenses throughout their trip
* Rules for business meals, such as who approves the amount
* Rules for client entertainment expenses, such as what is allowed
* Personal telephone usage
* Cell phone bill amount or percentage that is reimbursable during the weeks that the employee travels. Clarify whether calls for personal reasons will be covered by your company.
* Whether or not personal phone damages or theft are reimbursable during business travel, and if so up to what amount?

**Section 3: Non-reimbursable purchases**

Include a bulleted list with the potential travel expenses that your company will not reimburse. Make it clear that your company will only cover travel-related expenses and whatever provisions you accounted for in the previous section.

Here are some examples of non-reimbursable items that you may want to include in your travel policy:

* In-flight purchases, not airfare
* Excess baggage fees
* Childcare, pet care, and pet boarding
* Costs for family members joining travelers on their trip
* Toiletries or clothing
* Airline club memberships
* Minibar purchases or bar bills
* Laundry or dry cleaning
* Parking fines or traffic violations
* Airline ticket change fees
* First-class rail transportation
* Premium, Luxury or Elite car rentals
* Movies, online entertainment or newspapers
* Spa and health club usage
* Flowers, sweets and confectionery
* Room service
* Additional beds or bedding
* Clothes
* Damage to personal vehicles
* Rental car company insurance

**Section 4: Expense reporting and reimbursement process**

In the section on your expense policy and procedure, be sure to include the following:

* What tool to use for expensing
* What items do not need to be added in the expense tool, for example if a trip is booked with your approved booking tool
* Who to submit expense reports to
* What to include in reimbursement requests, such as original receipts
* Deadline for submitting reimbursement requests
* Typical processing time for receiving reimbursement

**Section 6: Travel support, safety, and duty of care**

It’s important for your travel policy to be something that travelers want to read. It should include information that they need to access, that way they must visit it regularly and at the same time, they can familiarize themselves with the document. Travelers definitely care about staying safe on the road, and your company should too. You should include information on travel support, travel insurance, and your duty of care provider right inside of your travel policy.

* **Tracking travelers’ whereabouts** – Use this opportunity to let travelers’ know that when they book using your approved method or tool, their trip is tracked. In the event of an emergency, steps will be taken to evacuate them. If you don’t know where they are, you can’t help! Include the name of your approved tool, and what they should do to ensure their trip is accurately tracked if they must book outside of it for a valid reason.
* **Travel support**– In case of trip cancellations, changes, etc., who should your travelers call? Include contact details for your travel support provider, including phone numbers, email addresses and whatever applies. If there are multiple numbers based on region or language, include those as well.
* **Support for emergency needs** – In this sub-section, include your duty of care vendor (if you have one) and your travel insurance policy details. Also include the employee name or vendor name they should contact in the event of an emergency.

**End of Document**