

**NINE
QUESTIONS
TO ASK
YOURSELF
BEFORE
WRITING A
T&E POLICY**



Insperity[™]

Inspiring Business Performance[™]



Because no two trips are alike, you can't place a fixed price on employee travel. You can, however, create guidelines for employees to make reasonable travel choices. A well-crafted travel and entertainment (T&E) policy can set the rules for corporate travel, while also saving you money and letting you see where your money is being spent.

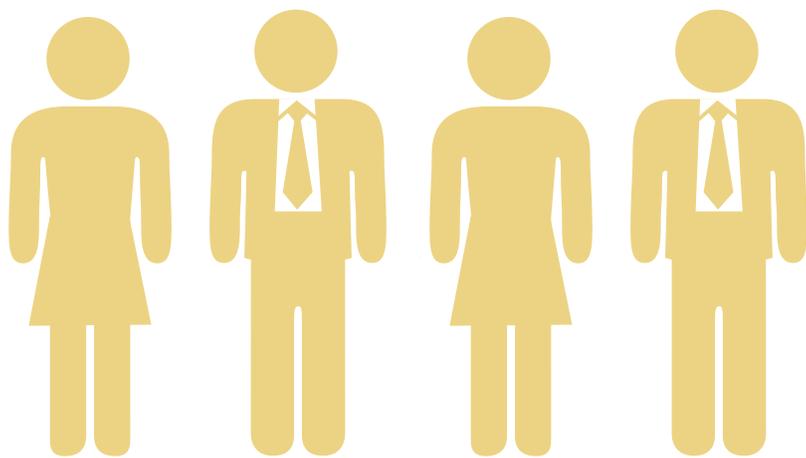
There isn't a one-size-fits-all T&E policy. Instead, you need a T&E policy that reflects your company's culture. So before you sit down to write, ask yourself these questions:





1. Who will write the policy?

Include a cross-functional team of employees who all have a stake in the process.



2. What is your policy on alcohol?

If *all* alcohol charges won't be allowed, specify this in your policy. By the same token, specify if a round of drinks when entertaining clients is acceptable.





3. Will you allow employees to fly first class?

Spell out the booking guidelines that you expect employees to follow, including overnight stays versus day trips based on flight accessibility and meeting schedules.



4. Will you allow employees to keep frequent flyer miles or hotel reward points?

Clarify whether miles and points accrued during business travel belong to the employee or to your company.





5. Have you spelled out what you consider necessary travel?

You need to be clear about what situations will be considered necessary for travel, how many people should be traveling together and whether you expect meetings to be held by phone or video whenever possible.

6. Are you using a corporate card program?

If you are using a corporate card program, explain when you expect employees to use the corporate card to pay for expenses across the board.



7. Do you have a designated travel vendor or partner?

Centralizing travel vendors will provide you with a good overview of what your employees are spending and whether they're complying with your policy. You can also negotiate deals if you use the same vendors.

52%

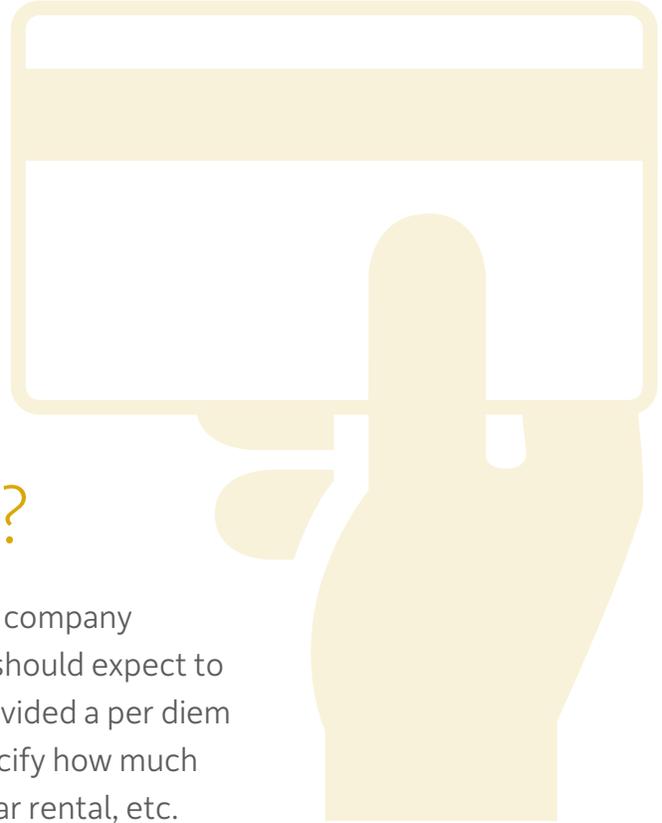
of best-in-class companies **create and enforce corporate travel policies** to **negotiate better deals** with airline and hotel vendors, as well as reasonable costs for meals while traveling. ^[1]

[1] Expense Management for a New Decade, Aberdeen Group, March 2011



8. What items or charges can employees be reimbursed for?

Be clear on what types of charges the company will reimburse. Tell employees if they should expect to pay out of pocket or if they will be provided a per diem amount. If it's a per diem amount, specify how much will be allocated for meals, taxi fare, car rental, etc.



9. Do your employees understand the consequences for non compliance?

Communicate your T&E policy to your employees regularly and spell out what will happen to employees who do not comply or are caught trying to commit fraud through travel expense reporting.

About Insperity

Insperity™, a trusted advisor to America's best businesses for more than 25 years, provides an array of human resource and business solutions designed to help improve business performance. Insperity Business Performance Advisors offer the most comprehensive Workforce Optimization™ solution in the marketplace that delivers administrative relief, better benefits, reduced liabilities and a systematic way to improve productivity. Additional offerings include MidMarket Solutions™, Performance Management, Expense Management, Time and Attendance, Organizational Planning, Recruiting Services, Employment Screening, Retirement Services and Insurance Services.

To find out more or learn how
Insperity can help your company,
call us at 800-465-3800.

Visit us at insperity.com.

The information contained in this document is for general, informational purposes only and is not intended to be legal advice. This information is not a substitute for the guidance of a professional and should not be relied upon in reference to any specific situation without first seeking the advice of a qualified HR professional and/or legal counsel regarding applicable federal, state or local laws. Insperity and its employees make no warranties, express or implied, and make no judgments regarding the accuracy of this content and/or its applicability to a specific situation. A reference or link to another website is not an endorsement of that site or service.