

POLICY 220: Travel Reimbursement Policy

I. PURPOSE AND SCOPE

Keck Graduate Institute (KGI) will only reimburse authorized and approved travel for KGI-related business. This policy is meant to set guidelines for employees on business-related travel expenditures while maintaining flexibility for KGI employees. All employees involved in spending on behalf of KGI should take full responsibility for learning and complying with this policy. This reimbursement policy applies to faculty, staff, students, and unaffiliated visitors to KGI. This policy is intended to enable members of the KGI community to conduct out-of-town business efficiently while complying with Internal Revenue Service (IRS) rules related to expense reimbursements. Any exception to this policy requires prior authorization from the VP, Finance & Administration and a written explanation of the exception from the traveler.

II. Making Travel Arrangements

KGI has selected Egencia as its corporate and preferred online booking tool for all business travel (air, rail, hotel, rental car). All travel arrangements should be made through the Egencia online website ("Corporate Travel Site") at <https://www.egencia.com> unless otherwise approved through the finance office.

All KGI travelers must establish a profile on the Corporate Travel Site. Travelers need to input a KGI- issued Wells One Credit Card/personal credit card in their profile on the Corporate Travel Site. You will then be required to complete an expense report in Workday to reconcile your KGI- issued Wells One Credit Card expense or seek reimbursement for any out-of-pocket business expenses. By using the Corporate Travel Site, you will have the independence to book your business travel.

The Corporate Travel Site is integrated with the KGI travel policy settings. Any travel marked outside of the KGI travel and expense policy may need to be approved in advance.

Directions for completing/submitting/editing your Travel Profile can be found at <http://egencia.com/daily/service/default.asp>.

Please fill out your profile as soon as possible and before your next business trip

III. Obtaining Authorization Prior to Travel

Travelers must obtain authorization before a trip whenever the trip costs are to be charged to an account for which the traveler is not the budget officer. Unauthorized travel and entertainment expenses are incurred at the traveler's risk and may not be reimbursable.

IV. Reimbursement



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KGI will reimburse all reasonable and necessary business expenses after completing a trip, provided these expenses are properly approved, documented, and reported according to guidelines.

V. IRS Requirements

The IRS may determine that an employer reimbursement is a taxable income to the employee if the employee submits the expenses more than 60 days after the expenses are incurred. The payroll office will add the amounts of such reimbursements to the employee's annual IRS Form W-2 unless an acceptable written explanation for the delay in submitting the request for reimbursement is provided with the expense report.

IRS regulations require original itemized receipts to support all reimbursable transportation or lodging expenses and any other travel expenses greater than \$25.00. KGI requires the submission of original receipts for all travel and entertainment expenses, including those for less than \$25.00. If the traveler does not provide proper documentation, the IRS requires KGI to include the reimbursements in taxable personal income for faculty, staff, or students and as miscellaneous income (on IRS Form 1099) for unaffiliated visitors.

VI. Travel Advances

KGI does not issue travel advances.

VII. Transportation

Travelers should choose the most economical and suitable transportation for each trip, i.e., air/rail travel plus public ground transportation or rental cars beyond Southern California and personal vehicles or airport ground transportation within Southern California.

A. Air and Rail

All air and rail reservations must be made through the Corporate Travel Site in such a manner as to secure the best available fare. KGI promotes a lowest logical fare travel culture. Also, KGI's policy is to book travel at least seven days in advance, 14 days or earlier is preferred, and all air travel must be in the economy class of travel

For flights with less than six continuous hours of travel = Coach/Economy class

- Generally, this means US Domestic travel within or between UK/EMEA, within the Asia Pacific region

For flights with greater than six continuous hours of travel = Premium Economy class

- Generally, it means overseas international travel between major continent regions as greater than six straight hours of travel

For Rail travel = Coach/Economy class

When traveling by air or rail, please note the following:

- Employees are expected to book non-refundable tickets



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- Employees are expected to use the lowest logical fare available.
- Employees are expected to book travel well in advance to obtain the lowest fare
- Employees are expected to use non-direct flights when the savings are substantial (\$100 or more) and the overall time difference is insignificant (less than 2 hours)
- Employees may express their preference for a particular airline but must accept the lowest-cost airfare if their preferred airline is not within the Policy parameters (<20%)
- Frequent flyer mileage accrued by an employee on business trips will be to the employee's benefit
- The cost of one checked bag will be reimbursed if it is not included in the flight fare

Upgrades and Extras

- Upgrades for air travel are not reimbursable unless mandated by medical conditions. In such cases, the traveler's physician needs to document in writing, in advance of the trip, the need for the upgrade and if the condition is temporary or permanent, and if temporary, for how long. If an employee wishes to upgrade, it is done using their own airline miles/coupons or at their own expense. Flight insurance is not reimbursable. KGI will not reimburse for alcoholic beverages on airlines. KGI will not reimburse for in-flight headphones, entertainment, Wi-Fi, or telephone calls (unless they are business calls and necessary).

Changes En Route

- If changes are required to your itinerary while en route, such changes must be made through the Corporate Travel Site. Representatives of the Corporate Travel Site are available to assist and can be contacted at 1 855 867 5231. Such phone-assisted calls cost considerably more than a comparable online transaction, and thus using the online Corporate Travel Site is our preferred method, if practicable. Use your existing tickets to apply against your new reservations. Any additional charges or refunds due will be billed to KGI's WellsOne credit card or personal card used.

Voids, Cancellations, and Unused Airline Tickets

- There is a 24-hour period for USA point-of-sale tickets, same day for Canada point-of-sale tickets, and a 48-hour period for Europe and Asia point-of-sale tickets where you can call the Corporate Travel Site to exercise a "courtesy void" and avoid penalties and fees.
- If a trip is canceled after the ticket has been issued, the Corporate Travel Site keeps track of all unused tickets. You will receive a reminder for unused tickets, and their expiration dates the next time you book air travel. The Corporate Travel Site will also prompt you to apply for an unused ticket when booking air travel on that specific airline. KGI expects employees to utilize and redeem all unused tickets before expiration and, therefore, may require travel on a particular airline to avoid an unused ticket from expiring.

International/Overseas Travel



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- All International travelers requiring a Visa or Passport should contact the Corporate Travel Site representative as early as possible for assistance. The cost of such a Visa or Passport is reimbursable if required for business travel.
- VAT (Value Added Tax) – Several European countries impose a potentially refundable value-added tax (VAT) on purchases. You must provide cash register receipts for any business purchase made in countries with VAT so KGI may recover these expenses. Please provide the charge card receipt if no other documentation is available.

KGI employees are recommended NOT to travel to countries where the US State Department has issued a Level 3 (Reconsider Travel) or Level 4 (Do Not Travel) travel advisory or countries that have a Centers for Disease Control Travel Health Notice for Covid-19 or similar health threats.

Exceptions will require approval from both your Cabinet representative and VP, Finance & Administration. All international travel arrangements must be made through Egencia. Please log on to the Corporate Travel Site to obtain a list of current advisories. You can also find the latest travel advisories and ratings on the US Department of State's official website at <https://travel.state.gov/>.

B. Ground Transportation

KGI encourages travelers to use other ground transportation as an alternative to rental cars at their flight destinations wherever available, practical, and economical. Appropriate ground transportation includes travel by train, subway, bus, shuttle van, or taxi. For transport between home or KGI and Southern California airports, travelers should select the least costly service available.

- Receipts should be obtained for all transportation expenses incurred. Make sure to ask for a receipt if one is not offered.
- The use of public transportation, hotel/airport shuttles, and taxis upon arrival at the employee's destination is preferred.
- Taxi fares plus tips (not to exceed 15%) are reimbursable.
- Transportation to/from the airport or home is allowable for business-related travel. We expect employees to utilize the most economical means of transportation to/from the airport or home unless there is a substantial difference in time required between the options (greater than an hour). In some instances, public mass transit (i.e., trains, subway, etc.), taxi, car services, or driving your vehicle and parking in long-term parking may be the most economical.

C. Tolls and Parking

- Receipts for all parking expenses are required. Original receipts should show the date and rate and be noted with the business purpose.
- Actual toll charges and parking fees incurred during business trips are reimbursable.
- Employees should attempt to find free parking before incurring any parking expenses.
- Employees must use long-term/economy parking facilities. Airport parking fees are reimbursable up to the end "date" of the business trip.
- Reasonable metered parking expenses may be submitted for reimbursement.



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- Toll and parking expenses incurred during a regular commute are not reimbursable.
- Additional costs for short-term valet service or covered parking are not reimbursable.
- Parking tickets or citations in normal circumstances are the employee's responsibility.

D. Rental Cars & Other Vehicle Rentals

All employees and students must complete the authorization to obtain motor vehicle records before renting a vehicle. The authorization form can be found on the Egencia corporate travel website. The authorization form can be securely submitted at the link below.

[Driver Authorization Form - Submission Link](#)

All rental car reservations are to be booked through our Corporate Travel Site. Car rental is reimbursable at flight destinations if public ground transportation is unavailable or impractical. The Claremont Colleges vehicle insurance policy only applies to rental cars used for KGI business and operated by KGI-authorized drivers. The policy only covers liability, not collision damage. KGI-authorized drivers and non-KGI-authorized drivers renting cars need to purchase the collision damage waiver insurance or pay for the rental with a credit card that offers such insurance, such as a KGI Wells One credit card. Non-KGI-authorized drivers must also ensure that their personal vehicle insurance includes sufficient liability coverage. Recommended insurance coverages are \$300,000 total liability and \$100,000 per incident. Our Corporate Travel Site contains negotiated corporate discounts with specific agencies, but the lowest-cost agencies should be selected.

Employees must reserve a car in the compact rental car category. Upgrades and discount coupons can be used to get another class car and/or free rental days. Larger vehicles may be reserved when their use is required to transport corporate partners, donors, and other employees to and from business functions, generally three or more passengers.

Car reservations should consider the lowest cost of any rental car agency. Keep in mind that public transportation may be more cost and time efficient in some densely populated urban areas. Fines and penalties for violation of traffic laws while operating rental vehicles are the employee's responsibility. Any physical damages incurred while renting is to be reported immediately to (1) the police, (2) the rental car company, and (3) your manager.

Any employee involved in an automobile accident while on college business must contact the Risk Management Office at (909) 621-8050 or x18050 as soon as possible.

[Rental Car Insurance](#)

- Domestic and visiting travelers should decline all liability insurance when renting a car in the US.
- When renting a car internationally, travelers should purchase insurance. Liability insurance is typically part of the rental contract and is included in the rental cost.
- The prepaid gas refueling option should always be declined at the time of rental. Employees should arrange to fill the rental with fuel before returning the rental car.

[Upgrades are permitted for:](#)

- Three or more KGI employees traveling together
- Hosting corporate partners and donors



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- Transporting excess baggage, such as booth displays

When Returning Rental Cars

- Vehicles must be returned to the original rental city unless approved for a one-way rental.
- Vehicles must be intact with no bumps, scratches, or mechanical failures.
- Avoid hourly charges by returning rental cars on time.
- The vehicle must have a full gas tank before returning them to the vendor. This can save as much as 50% of the gasoline cost.

Car Rental-related Reimbursements

- All car rentals should be booked through Corporate Travel Site to be eligible for reimbursement.
- The cost of tolls incurred while using a rental car is reimbursable.
- The employee is responsible for any additional cost resulting from the unauthorized use of a rental automobile for other than official business travel-related purposes.

Whenever multiple employees are traveling together, every effort to rideshare or carpool must be made. When picking up a rental car, check with the rental car agency for promotional rates, last-minute specials, or free upgrades. At the time of rental, inspect the vehicle and ensure any damage found is noted on the contract before the vehicle is accepted. When plans change, employees are responsible for working with Corporate Travel Site personnel to cancel rental car reservations.

E. Personal Vehicles & Mileage

KGI reimburses mileage driven with personal vehicles while conducting business within Southern California to the extent that the mileage exceeds normal commuting miles to and from the traveler's home and KGI. The Claremont Colleges vehicle insurance policy does not cover using personal vehicles for KGI business. Travelers using their own vehicles need to maintain the recommended insurance levels of \$300,000.00 total liability and \$100,000.00 per incident.

- For official business travel, KGI employees are encouraged to use their private vehicle when the costs, including parking, are less than taxis, shuttles, or other available transportation.
- Travel expenses incurred to and from the employee's principal workplace are not reimbursable.
- If a traveler chooses to use a personal vehicle to drive between KGI and a location outside of Southern California, KGI will reimburse the lesser of the mileage driven or the coach/economy airfare to that destination. Employees utilizing their personal vehicles for business purposes must carry a valid driver's license and appropriate insurance coverage in accordance with state or country laws.
- Mileage will be reimbursed at the standard IRS mileage allowance, which the IRS updates periodically, usually each January 1, but sometimes at other dates. In addition to the standard mileage allowance, KGI reimburses toll charges and parking fees.
- A detailed mileage report, including dates, start and stop location address, name of clients/vendors, business purpose, and mileage, must be listed on the expense report to be reimbursed



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- The cost of tolls incurred while on business travel is reimbursable, and receipts should be submitted
- Traffic or parking tickets, gasoline, insurance, repairs, and other vehicle operation or maintenance expenses are not reimbursable for using personal vehicles for KGI business, as the IR S mileage allowance is designed to cover those costs.

VIII. Lodging

Travelers are expected to select reasonably priced lodging accommodations. Lodging is reimbursable when overnight stays are required on business trips. KGI may reimburse staying over the weekend before or after a business trip if the airfare savings exceed the additional lodging and meal costs for the weekend (if approved in advance by a manager). Personal care and entertainment expenses are generally not reimbursable. Child care or pet care costs at home while traveling are also not reimbursable.

All hotel/motel accommodations should be booked through our Corporate Travel Site. Egencia has negotiated corporate and special preferred rates with hotel chains and individual properties worldwide. The Corporate Travel Site encompasses these rates and has access to available inventory from both the Expedia.com site as well as from its dedicated site - hotels.com. Alternative accommodations through Airbnb, VRBO, or other private rentals are prohibited.

- Travelers may accept only complimentary upgrades. KGI funds may not be used for costs associated with upgrades. Any room upgrades using rewards/miles/credits are considered a personal expense and are not reimbursable.
- You will be required to utilize a personal or KGI-issued Wells One credit card to book hotel/motel accommodations in the Corporate Travel Site, which should also be used at checkout to pay your hotel/motel bill.
- No reimbursement will be made for additional amenities such as in-room entertainment, hotel valet parking, mini/personal bar, spa treatments, gym, etc. Room service may be expensed as a meal if it is within the meal expense policy.
- Business telephone calls, a safe arrival call, and meals are reimbursable. Employees should not be charging phone calls to their hotel rooms. Employees must use calling cards or cell phones to make such phone calls.
- Original receipts with the room rate, lodging dates, taxes, and form of payment are required.
- The itemized hotel bill must be attached to the expense report.

IX. Meals

A. Meals

KGI expects employees to avoid meal costs that may be considered extravagant. Meal expenses are dining alone on a business trip or paying for oneself and other KGI business travelers or guests at a group meal. Reasonable, actual meal expenses will be reimbursed for an employee who is away from home (or away from the employee's standard "base office" area) overnight for business reasons. For example, lunch is not a reimbursable business expense if one travels from San Francisco to Los Angeles and returns in the



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evening on the same day.

- Employees' personal meal expenses are reimbursed based on reasonable expenses with receipts. We recognize the definition of "reasonable" is subject to interpretation. Reasonable meal costs and tips are reimbursable, generally up to **\$25.00, \$30.00, and \$40.00** per person per day for breakfast, lunch, and dinner (or the international currency equivalent) per day.
- Employees must submit itemized receipts and need to include the name, title, and or organization of each person present at the meal and the business purpose of the meal.
- When two or more employees travel together, it is customary for the most senior KGI member present at a group business meal to pay the bill for all. When this occurs, the employee incurring the expense must indicate which employees had meals purchased.

IRS Requirements

The IRS disallows travel meal expenses for one-day travel. KGI will reimburse the actual cost of a meal during a one-day trip involving no overnight stay only when the meal has a defined business purpose and is justified in writing. Regardless of cost, all meals and entertainment expenses must be supported by an itemized receipt attached to the expense report and include the following:

- Name, title, and the company of all attendees
- Name and location of the establishment where the event took place
- Original receipt/invoice for the expense
- The specific business topic discussed

B. Alcohol

KGI does not reimburse for alcoholic beverages at business meals. Federal regulations prohibit the charging of alcoholic beverage costs to federal research grants.

X. Spouse Travel

The expenses of a spouse or other family member accompanying a business traveler are generally not reimbursable. IRS rules state that a spouse or other person attending a meeting or conference with no significant role or performing only incidental duties does not constitute a business purpose. When a spouse who attends a function has an essential part in the proceedings or is involved in fundraising activities, this constitutes a business purpose under IRS regulations. In such cases, KGI will reimburse the business traveler for the spouse's non-personal expenses for travel on KGI business. The original receipts for the spouse's expenses need to state the business purpose of the trip. When the spouse or significant other does not have a role in the proceedings or business purpose, the employee is expected to pay for all spouses' meals except a bona fide business meal with a customer or associate in which the spouse's attendance is appropriate.

XI. Business Communications

Business communications expenses for teleconferencing or internet connections while

traveling on KGI business are reimbursable.

XII. Non-Reimbursable Expenses

The following includes, but is not limited to, examples of non-reimbursable expenses:

In general, expenditures of a personal nature, unreasonable or excessive expenses, those not explicitly related to the conduct of KGI business, and those not specifically covered in the preceding section are **not** reimbursable. The following are indicative of the type of, but not limited to, expenses that may **not** be reimbursed:

- Personal entertainment (i.e., not incurred in connection with KGI business)
- Charges resulting from upgrades for travel
- Travel Insurance
- Excess/overweight baggage charges
- Lost baggage insurance
- Lost airline ticket/processing fees for lost tickets
- Lavish or extravagant costs not warranted by the business circumstances
- “No Show” charges for hotel or car service
- Insurance costs for personal car
- Parking tickets or other traffic fines
- Cost of entertaining guests at home, unless specifically approved by a department head
- Personal telephone calls
- Theft of personal property, including articles stolen from a private car or rental car
- Vehicle repairs due to accidents
- Delinquency fees/finance charges for personal credit cards
- Charitable contributions/PAC contributions.
- Any estimated or unexplained expenses
- Lost personal items

XIII. Travel on Sponsored Projects

A. Statement of Policy

All travel performed under, and charged to, federal and non-federal sponsored projects (grants, contracts, and cooperative agreements) must comply with policies established by Keck Graduate Institute, federal regulations, and sponsor terms and conditions. Travel charged to any sponsored project is treated consistently with federal travel guidelines. Where guidelines differ between this policy and federal or sponsor guidelines, the federal or sponsor guidelines will take precedence. Please refer to 2 CFR 200 Subpart E – Cost Principles, the federal Notice of Award, or other grant or contract award documents.

B. Scope and Guidelines

This policy applies to all individuals at KGI who travel to participate in activities related to a federal or non-federal-sponsored project. KGI personnel may charge travel expenses to sponsored projects only if the travel is specifically budgeted in their award documents and



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which expenses directly support activities proposed under the project and awarded by the sponsor. All travel must be allowable, allocable, reasonable, and consistent with this policy. In general, travel costs are transportation, lodging, subsistence, and related items incurred by employees who are in travel status on official business of KGI as the recipient of a grant or contract award. Such costs must be charged on an actual cost basis, applied to an entire trip, and result in charges consistent with those typically allowed in like circumstances with KGI's non-federally-funded activities.

1. Federal Requirement for Original Receipts

All original, itemized receipts must be presented with your request for reimbursement under a sponsored project. Restaurant receipts must be the original, itemized receipts and show the number of diners, a list of food and beverage items purchased, the tip given, and provide documentation that no alcoholic beverage purchases were being requested for reimbursement.

2. Travel Costs

Travelers must seek the most economical and suitable transportation for each trip.

- **Airfare**

The lowest economy fare must be used for air travel. Business class or upgraded economy travel is not permitted unless the available basic economy options would a) fail to reasonably accommodate the traveler's medical needs (in which case the traveler's physician needs to document in writing, in advance of the trip, the need for the upgrade; b) would require circuitous routing or c) would excessively prolong travel. The traveler may upgrade their seats or class of service with formal documentation showing the cost of the basic economy option on the same flight (the only portion of the cost that can be charged to the sponsored project).

All flights (domestic and international) supported with federal funds must be taken on USA flag air carriers, regardless of cost or convenience – unless an exception, as listed in the Federal Travel Regulation (FTR), is authorized (see <https://www.gsa.gov/policy-regulations/regulations/federal-travel-regulation-ftp>). If international travel is proposed, it must be outlined in both the grant proposal and the sponsor's Notice of Award and follow the "Fly America Act" rule (see <https://www.gsa.gov/policy-regulations/policy/travel-management-policy/fly-america-act>).

- **Ground Transportation**

KGI encourages travelers to use other ground transportation as an alternative to rental cars at their flight destinations wherever this is available, practical, and economical. Appropriate ground transportation includes travel by train, subway, bus, shuttle van, or taxi. For transport between home or KGI and Southern California airports, travelers should select the least costly service available. Mileage is reimbursed at the IRS rate in effect at the time of travel. Original receipts must be provided for transportation services; a printout of an online mileage calculator (such as MapQuest or Google Maps) must be included to substantiate personal vehicle mileage charges to federal awards.

- **Lodging**



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Travelers are expected to select reasonably priced lodging accommodations. The lowest standard room rates are generally available through online booking sites or conference sponsors. The traveler may upgrade their accommodations with formal documentation showing the cost of the basic room or conference rate (the only portion of the cost that can be charged to the sponsored project). Lodging is reimbursable when overnight stays are required on business trips. Receipts supporting room service charges must be the original, itemized receipts provided with the meal, and show the number of diners, a list of food and beverage items purchased, the tip given, and provide documentation that no alcoholic beverage purchases were being requested for reimbursement. The master hotel folio does not typically itemize room service meal charges to this degree of detail. Personal care and entertainment expenses (e.g., toothpaste, pay-per-view movies) are not reimbursable.

- **Travel Costs for Dependents (Federal Awards Only)**

For federal awards only, temporary dependent care costs (as a dependent is defined in 26 U.S.C. 152) above and beyond regular dependent care that directly results from travel to conferences is allowable provided that:

- (i) The costs are a direct result of the individual's travel for the federal award;
- (ii) the costs are consistent with KGI's documented travel policy for all entity travel; and
- (iii) are only temporary during the travel period. Travel costs for spouses and/or dependents are unallowable, except for travel of six months or more with prior approval of the Federal awarding agency.

3. Meals and Entertainment

- **Meals**

Business meals may be charged to sponsored projects only if they are linked to a meeting or conference at which technical information is being disseminated that directly relates to and supports the aims of the sponsored project. KGI does not reimburse meals under federal awards on a per diem basis. Original, itemized receipts supporting meals are required and must show the number of diners, a list of items purchased, the tip given, and provide documentation that no alcoholic beverage purchases were being requested for reimbursement. The IRS disallows travel meal expenses for one-day travel. Meal expenses for the general project or team meetings with KGI staff, program participants, or other local or out-of-town collaborators (whether the meeting is held at KGI or another local location) are unallowable.

- **Alcohol**

Federal regulations prohibit the charging of alcoholic beverage costs to federal awards. If a meal includes alcohol, this must be paid for by the traveler. If a meal's original, itemized receipt is missing, no part of the expense may be charged to a sponsored program, as there is no way to determine whether alcohol was served.

- **Entertainment**

Entertainment costs of any kind are unallowable.

XIV. Resources

Egencia Resources

Emergency / En Route Changes to Travel - During regular business hours (8:00 am PST to 5:00 pm PST), please contact 1 855 867 5231

Travel Policy Issues - Any questions, concerns, or suggestions regarding this travel policy may be directed to finance@kgi.edu

Policy Version History

| Version | Date | Description | Approved By |
|---------|---------------|---|--------------------------------|
| 1.0 | July 2013 | Initial Policy | Cabinet |
| 2.0 | January 2014 | | VP of Finance |
| 3.0 | March 2017 | | VP of Finance |
| 4.0 | March 2019 | | Cabinet |
| 5.0 | November 2021 | | Cabinet |
| 6.0 | October 2022 | | Cabinet |
| 7.0 | November 2023 | | Cabinet |
| 8.0 | February 2025 | | Cabinet |
| 9.0 | 06/04/2025 | Changed template and added version history. | VP of Finance & Administration |

Responsible Officer – Vice President of Finance & Administration

Administrator – Finance