Student Affairs Procedure Manual

TRAVEL

Number: SA-515
Subject: Travel Procedures
USU Policy: 515 - Travel Policy
Last Update: July 1, 2018
Effective: July 1, 2018

Listed below are specific procedures regarding travel for members of the Division of Student Affairs. As a general rule, travel expenses are incurred and reimbursed at the actual rate. All current policies and procedures through the University Travel Office are still in effect. These division-specific procedures were approved for Student Affairs by Dr. James Morales on July 1, 2018.

Exceptions to these procedures only on approval by Dr. James Morales.

The Student Affairs Division is responsible for ensuring funds allocated to it are used to further the mission of the institution and where appropriate, the wishes of the benefactors. There is no room for waste or misuse, period. Business Services is charged with assisting division departments in upholding this mandate.

As an institution of the State and the Utah System of Higher Education, the University is subject to the provisions of:


To be an accountable plan, your employer's reimbursement or allowance arrangement must include all three of the following rules:

1. You must have paid or incurred expenses that are deductible while performing services as an employee
2. You must adequately account to your employer for these expenses within a reasonable time period, and
3. You must return any excess reimbursement or allowance within a reasonable time period

If your employer's reimbursement arrangement does not meet all three requirements, the payments you receive should be included in the wages shown on your [Form W-2](https://www.irs.gov/pub/irs-pdf/fw2.pdf) (PDF). You must report the payments as income, and you must complete [Form 2106](https://www.irs.gov/pub/irs-pdf/f2106.pdf) (PDF), Employee Business Expenses, or [Form 2106-EZ](https://www.irs.gov/pub/irs-pdf/f2106ez.pdf) (PDF), Unreimbursed Employee Business Expenses, and itemize your deductions to deduct your expenses. See [Publication 463](https://www.irs.gov/taxtopics/tc463.html) for detailed information on your employer's reporting requirement for business expenses and how you are required to report these expenses on your tax return.

**SA-515.1 GENERAL POLICIES**

Travel in the name of the University requires a Travel Authorization (TA) and a Travel Reimbursement (TR).

- The TA is an estimation of all foreseeable travel costs and constitutes the required approval.
- The TR documents actual expenses incurred during travel and where final documents are attached.

TAs not submitted at least two weeks prior (10 business days) to the first day of travel are considered late and may be denied. Late requests will require written justification (addressing lateness for TA), from the traveler as well as their director’s signature. Written justification and director signature does not guarantee travel approval. The Associate/Assistant Vice President (AVP) for Student Affairs will review consistently late travel requests, which may result in revocation of traveling privileges and/or denial of travel reimbursement.
1.1 TRAVEL AUTHORIZATION (TA)
TAs need to be initiated with the Travel Specialist as soon as possible (no later than 10 business days) and include:
- All pre-purchased expenses (registration, hotel, airfare, etc.)
- Emergency contacts of those traveling
- Conference/meeting agenda (if applicable)
- List of meals provided (see below if a meal is allowed at the meeting)
Advisor approval is required of student/student groups prior to TA initiation.

1.2 TRAVEL REIMBURSEMENT (TR)
TRs with reimbursement not initiated by the traveler within one week (5 business days) of the traveler’s return may result in termination of traveling card, denial of travel reimbursement, and/or revocation of traveling privileges.
TRs need to be initiated with the Travel Specialist and include:
- Receipts including TA number
- Required Meal & Entertainment forms
Reimbursement for group travel will be processed upon submission of all party receipts.

TRs should be requested through ServiceNow within 5 business days of return date on TA, after which time a non-reimbursable TR may be initiated by Travel Specialists. Had a personal reimbursement been owed, written approval for reimbursement will be required by the traveler’s supervisor and AVP, prior to being processed. This request must be attached to the ServiceNow TR.

1.3 AFTER-THE-FACT TRAVEL
All after-the-fact travel must be approved by the AVP of Student Affairs. Traveler is in jeopardy of termination of traveling card, denial of travel reimbursement, and/or revocation of traveling privileges. Written approval request must be attached to the ServiceNow TR.

1.4 CASH ADVANCE
Cash advances not returned within 5 business days of travel may result in denial of travel privileges. Cash advances not returned within 5 business days are considered late and will be charged to a departmental index.

Indexes may be charged for shortage of returned cash advances.
Example: A student club is given $500 cash advance, returns $475 in receipts, $20 in unused cash, leaving a reminder of $5. The $5 will be taken from the student club index to cover the shortage.

1.5 TRANSPORTATION
(1) MOTOR POOL/RENTAL VEHICLES
Student Affairs prefers the utilization of USU Motor Pool for travel less than 100 miles or less than one day. For travel in excess of 100 miles Student Affairs should use Enterprise (https://www.enterprise.com/en/home.html) or another Logan based car rental business.

- Travel to the SLC International Airport should be done with one-way rental through Enterprise, Salt Lake Express, or equivalent shuttle service.
- Fuel costs are only reimbursable with receipts turned in within five (5) business days of return.
Exceptions need to be approved by the AVP.

(2) PRIVATE AUTOMOBILE

To verify private vehicles transportation is the most fiscally responsible, travelers must submit the following prior to traveling, or reimbursement may be denied:

- Enterprise or other rental car quote.
- Total Cost of Flying

The following situations may justify the use of private vehicles for travel and will require prior approval from the AVP:

When travel is required at such time or to such places that common carrier transportation may not be reasonably available.

When one or more persons travel to the same destination in the same vehicle and total mileage claimed does not exceed the total airline tourist fares for transporting the same number of people.

When the comparison of the "total cost of driving" and the "total cost of flying" expenses show that it is less expensive to drive than to fly.

- **Total Cost of Driving** includes en route meals, en route lodging, and the Student Affairs approved rate for mileage reimbursement when a private vehicle is used for University business.
- **Total Cost of Flying** includes the lowest unrestricted airfare (changes can be made to the ticket, seating or change flight), luggage fees, airport parking, and all required ground transportation.

A minimum of thirty (30) days prior to travel the employee should provide vendor quotes (via ServiceNow), documenting the cost of airfare and/or vehicle rental, quotes must be attached to travel records. Failure to do so will result in closure of ServiceNow request and may result in reduced reimbursement in the amount approved by the AVP. The employee will be reimbursed at the more economical travel cost unless approved by the AVP.

Student Affairs uses the U.S. Department of Energy Trip Calculator to determine mileage and fuel cost between USU and travel destination(s). Mileage should be referenced on the Travel Authorization from city to city. Traveler will be reimbursed up to the trip fuel cost listed on the trip calculator. Mileage “in and around” town will not be reimbursed. Travel destinations should be specified by street or location address.

Travelers using their private automobile may be reimbursed up to .40 cents per mile contingent upon prior approval of AVP. If a motor pool or rental vehicle is available and the employee chooses not to use it, reimbursement will be at the lower of the two rates.

(3) AIRCRAFT/FLIGHT

- **Travel insurance may be covered with written approval from the department director.** Travel insurance covers cancellations, medical expenses, evacuations, loss or delays, and 24/7 assistance. The average cost is typically between 4-10%
- **Upgrade costs for meal and seats are not allowed without the approval through**
SA-515.2 MEALS
Student Affairs covers meal costs at actual rates (reimbursements require itemized receipts) not to exceed Per Diem rates of:

The rates are as follows:
$36.75 Travel Day (first and last day of travel)
  25% Breakfast $9.18
  30% Lunch $11.02
  45% Dinner $16.53
$49.00 Full Day (the days in between the travel days)
  25% Breakfast $12.25
  30% Lunch $14.70
  45% Dinner $22.05

Travelers must adhere to the approved Per Diem rates and limits set by the University and the State of Utah. Meals provided during travel will be deducted from the allowed Per Diem rate. Travelers exceeding the allotted Per Diem amount will be required to reimburse the University. Reimbursed payments not received within 60 days of the conclusion of the trip will be reported as taxable income in accordance with the IRS guidelines (http://www.usu.edu/hr/files/uploads/Policies/515.pdf).

As a general rule, travel less than 12 hours in one day may not have meals covered. A meal may be purchased with University funding if the division member is traveling under at least one of the following circumstances:
- With students
- Conducting business with a colleague from another university/organization to advance the University’s goals and mission

Vendors seeking to obtain University business are not permitted to purchase a meal for a division member unless they are currently under contract with the University. Contracted vendors may pay for expenses (e.g., meals, airfare, hotel, etc.) outlined in the contract (http://le.utah.gov/xcode/Title67/Chapter16/67-16-S5.html).

2.1 TIPS
Tips up to 18% are permitted. Tips in excess of 18% are only allowed in order to comply with the establishment’s policy (e.g., automatic 20% for groups of eight or more).

SA-515.3 FAMILY TRAVEL
Companions (not employed by USU) accompanying traveler on University business:
(1) Need pre-approval of Vice President for Student Affairs to travel (https://travel.usu.edu/files/companion_travel_approval.pdf);
(2) Are not covered by University insurance; and
(3) Are advised to not ride in Motor Pool or rental vehicles.
(4) Passengers under the age of 18 are prohibited from riding in Motor Pool vehicles.
(5) Traveler purchasing meals with a University p-card should keep transactions separate.

SA-515.4 GIFTS
As a state employee, traveler is NOT permitted to accept or solicit gifts or any benefit from vendors who may be seeking to obtain University business. These vendors are also not allowed to pay for any portion of trip expenses. See Utah Code 76-8-105.
SA-515.5 LATE NIGHT TRAVEL
Risk Management recommends when long travel periods are necessary, drivers should rotate and/or take rest stops every 90 to 120 minutes. If this can be done safely, such stops should include getting out of the car and stretching. Long distance travel should not extend the driving day beyond ten hours and this duration should only be achieved by alternating drivers at least every two hours. Driving later than 10:00 p.m. after a full day should be avoided, if practical. All possible drivers must have passed the State of Utah’s defensive driving test.
The director has the discretion to allow a hotel room to be booked to avoid late night travel by students or student groups.

SA-515.6 OPEN TA REQUESTS
University Travel Office has recommended the following requirements for monthly, semester, or year open TA’s:
- Grant funds (Fund type 22) should not be used beyond the fund termination date.
- Must be for a specific event (i.e. set monthly meeting).
- Must list potential dates of travel when possible.
- Must include all foreseeable costs.
- Must have a TR processed after every trip, even if there will be no reimbursements.

Once an open TA has been submitted and approved:
Before travel
   Notify your Travel Specialist
   Date(s) of travel
   Times
   Others in party (if any)
   Agenda
After travel
   Notify your Travel Specialist
   Travel has been completed
   Travel log with any expenses incurred

SA-515.7 Point cards
Point-cards may be used for self-purchase of hotels or plane tickets. Group travel needs to be done on a university p-card.

Requests that do not meet the above requirements will require written justification (addressing the reason why), and will need to be approved by both their director, and the AVP.

SA-515.8 Citations
Citations and all associated fees will be covered by the traveler receiving the citation.

REFERENCES
Publication 463, Travel, Entertainment, Gift, and Car Expenses
Wage and Tax Information
   Form W-2
Employee Expenses
   Form 2106
   Form 2106-EZ
Travel, Entertainment, Gift, and Car Expenses
   Publication 463
Utah Division of Fleet Operations

Enterprise Car Rental

https://www.fueleconomy.gov/trip/

USU Policy 515: Travel Policy
http://www.usu.edu/hr/files/uploads/Policies/515.pdf

Utah State Legislature: Utah Public Officers’ and Employees’ Ethics Act
http://le.utah.gov/xcode/Title67/Chapter16/67-16-55.html

USU Companion Travel Form
https://travel.usu.edu/files/companion_travelApproval.pdf