

Utah Tech University Policy

223: Travel



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I. Purpose

- 1.1 Utah Tech University (“the University”) has a fiduciary responsibility to ensure resources are used responsibly and to be accountable for how public monies are spent. The purpose of this policy is to define acceptable expenses and procedures when traveling on University-approved business. Those who travel on behalf of the University hold a position of trust and authority, requiring the demonstration of integrity by judicious use of such funds.

II. Scope

- 2.1 This policy is applicable to all faculty, staff, students, and volunteers who are engaged in University-approved business while traveling.

III. Definitions

- 3.1 **Economical:** Taking care not to waste University money or resources by weighing the value of a good or service in relation to the amount of money, time, and effort spent.
- 3.2 **Extra Flight Services:** Upgrades beyond the standard airfare rate.
- 3.3 **Group Travel:** Travel involving groups of two or more people where one employee accepts responsibility to manage the finances for the trip, and where only one person will be requesting reimbursement for trip expenses (for example, travel for student groups with an employee chaperone or student athletes with a coach).
- 3.4 **Group Travel Manager:** The employee who accepts responsibility to manage the finances for the trip and submits the Travel Pre-Approval and Travel Expense Report for the group.

- 3.5 **International Travel:** Travel outside of the continental United States and Alaska and Hawaii.
- 3.6 **Large-Capacity Passenger Vehicle:** A vehicle designed to carry 12 passengers and approved by the Utah Division of Risk Management to do so. Not all makes and models are approved for use.
- 3.7 **Local Travel:** Travel within a 100-mile radius of a designated campus location on University business for less than 16 hours.
- 3.8 **Non-Employee:** Those who are providing services to the University and are being paid by the University, but do not qualify as University employees. May include, but are not limited to, consultants, guest speakers, guest lecturers, visiting professors, visiting students, and prospective employees.
- 3.9 **Personal Vehicle:** A vehicle owned by the driver.
- 3.10 **Rental Car:** Vehicles rented from state contract vendors and reserved by the State of Utah Travel Office, or online using a state contract code.
- 3.11 **Travel:** Travel outside a 100-mile radius of a designated campus location on University business or travel within a 100-mile radius of a designated campus location on University business for more than 16 hours.
- 3.12 **University Fleet Vehicle:** A vehicle owned by the University or leased through State of Utah Fleet Operations.
- 3.13 **Volunteer:** Any uncompensated individual who is authorized by the University to perform humanitarian, charitable, or public services on behalf of the University, or to gain personal or professional experience in specific endeavors.

IV. Policy

4.1 Pre-trip Requirements

- 4.1.1 Travel should be planned in advance and booked at the most economical rates to ensure value to the University and efficient use of the traveler's time.
- 4.1.2 An individual must submit a Travel Pre-Approval, outlining the business purpose. The travel must be approved by supervisor, budget administrator, and travel office before travel occurs.

4.1.3 Group Travel

4.1.3.1 For group travel, one employee needs to be designated as the Group Travel Manager over students and/or volunteers traveling. The Group Travel Manager needs to submit a Travel Pre-Approval on behalf of the group. If any member of the group expects to incur travel expenses that will need to be reimbursed to them personally, they will need to submit a Travel Pre-Approval for all of their travel expenses and not be included in group travel in any way.

4.1.4 Supervisors and budget administrators should only authorize travel with a bona fide business purpose.

4.1.5 Supervisors and budget administrators should not unnecessarily delay the travel process.

4.1.6 Sufficient funds must be available to cover all travel costs prior to the trip. The funds must reside in the index codes designated for travel.

4.1.7 The University has the right to deny a travel request due to substantial travel risks, an inadequate relationship between travel and the oversight responsibilities of the traveler, and/or an inadequate business purpose for the trip.

4.1.8 International Travel

4.1.8.1 International travel must be pre-approved by their respective vice president and the University President.

4.1.8.2 The Travel Pre-Approval form must be submitted to the travel office with all required approvals at least thirty (30) days before trip occurs.

4.1.8.3 Travel outside of the United States, its possessions, and territories is not covered under the University's Risk Management insurance and requires the purchase of Risk Management-approved international travel insurance through the travel office.

4.1.8.4 All persons travelling on University-appointed business must be at least 18 years or older for international travel.

4.2 Travel Expenses

4.2.1 Travelers on University business are required to comply with all laws, regulations, and University policies while traveling. Travelers will not be reimbursed for tickets or fines as a result of breaking the law.

4.2.2 All travel expenses must comply with Policy 221.

4.2.3 Air Transportation

4.2.3.1 It is preferred that all flights are booked through State Travel. The traveler may also choose to book directly with airlines.

4.2.3.2 Cancelled Tickets

4.2.3.2.1 Tickets or any portion thereof that go unused, have future value, and were paid for by the University remain property of the University. The traveler should make every effort to apply any credit, coupon, or voucher to another University business trip. Emergency cancellations will be reimbursed as long as the cancellation was requested and/or approved by the traveler's supervisor and the respective budget administrator. Itinerary change fees may be reimbursed only with approval by the traveler's supervisor and the respective budget administrator.

4.2.3.3 Luggage

4.2.3.3.1 The University will pay for carry-on luggage, if applicable, and one checked bag. The traveler is responsible for any additional baggage costs, unless they provide written documentation explaining the business need for additional bags.

4.2.3.4 Extra Flight Services

4.2.3.4.1 All costs associated with extra flight services are the responsibility of the traveler and will not be reimbursed by the University unless there is a documented and approved need for the request. This approval must be in writing from the traveler's supervisor and budget administrator.

4.2.3.5 Charter Flights

4.2.3.5.1 All charter flights must be approved and booked through the Purchasing Services office.

4.2.3.6 Private/Personal Aircraft

4.2.3.6.1 The University does not provide payment for travel in private aircraft unless authorized by the President.

4.2.4 Federally Funded Grants

4.2.4.1 All travelers must comply with the Fly America Act unless exceptions in the Open Skies Agreement pertain.

4.2.5 Ground Transportation

4.2.5.1 The following modes of ground transportation are as approved for business travel:

4.2.5.1.1 University Fleet Vehicle reserved through Facilities Management

4.2.5.1.2 University Fleet Bus reserved through Road Scholar

4.2.5.1.3 Rental car

4.2.5.1.4 Personal vehicle

4.2.5.1.5 Taxi, shuttle, train, ride share, and bus

4.2.5.2 Rental vehicle

4.2.5.2.1 All domestic reservations should be reserved using the State of Utah Travel Contract. Under State contract, the following drivers must (1) be on official University business and (2) be at least 18 years old, 21 years old when driving a Large-Capacity Passenger Vehicle.

4.2.5.2.2 When a State contract rate is available and the renter does not take advantage of the contract, the renter assumes all responsibility and liability for the rental. Additionally, the University will only reimburse the traveler up to the amount of the State contract rate.

4.2.5.2.3 When a State contract rental vehicle is not available at the travel destination, the University does not have insurance coverage in this case. If rental vehicle is not

on State contract, liability insurance must be purchased with limits of 100,000/300,000/25,0000 and full collision damage waiver insurance.

4.2.5.3 Large Capacity Passenger Vehicle

- 4.2.5.3.1 The State of Utah offers contracts for Large-Capacity Passenger Vehicles. Many restrictions apply, and not all makes and models are approved for use. Current information is posted on the Utah Division of Risk Management's website.
- 4.2.5.3.2 Minor children are allowed as passengers in most State contract rentals.
- 4.2.5.3.3 Minor children are not allowed to be transported in Large-Capacity Passenger Vehicles.

4.2.5.4 Personal Vehicle

- 4.2.5.4.1 A Personal Vehicle is not covered by University insurance. The driver assumes all responsibility and liability.
- 4.2.5.4.2 Mileage reimbursement for a Personal Vehicle will be based on mileage from the traveler's primary work address to the travel destination at the IRS mileage rate.
- 4.2.5.4.3 When traveling more than 500 miles one-way, a Personal Vehicle should not be used.

4.2.6 Lodging

4.2.6.1 Hotels and Short-term Rental

- 4.2.6.1.1 University travelers should book standard room accommodations at non-luxury/moderately priced hotels. When lodging costs are deemed excessive, written justification will be required.
- 4.2.6.1.2 All lodging claims must be supported by a detailed folio showing daily room rate, guest name(s), dates of stay, type of accommodation, and all other room charges.

4.2.6.2 Private Homes

- 4.2.6.2.1 When staying with family or friends, University travelers may receive a lodging allowance of \$20 per day.

4.2.6.3 Time Shares

- 4.2.6.3.1 When staying in Personal Timeshares, University travelers may receive up to \$90 per night. Appropriate documentation from the Timeshare is required.

4.2.7 Meals and Meals Per Diem

- 4.2.7.1 A University traveler is allowed a maximum meal per diem each day at the U.S. General Services Administration (GSA) meal rate for that location. When a meal is provided for the traveler, the traveler should opt out of per diem for that meal.
- 4.2.7.2 When a meal is provided for the University traveler, the traveler should opt out of per diem for that meal.
- 4.2.7.3 Group meals, including for a non-employee or for a student, are considered business meals.
 - 4.2.7.3.1 It is preferred that group meals are purchased using a University Purchasing Card.
 - 4.2.7.3.2 Group meals should not include any other traveler that has filed their own Travel Pre-Approval for the trip.
- 4.2.7.4 Cash Meal Allowance
 - 4.2.7.4.1 An employee who is acting as group manager may choose to give group participants a cash meal allowance rather than submit receipts for individual meals. The allowance must be less than or equal to the meal per diem allowance. In such cases, group participants must sign a form verifying the amount each received.
 - 4.2.7.4.2 The cost of all group meals for the day cannot exceed the daily meal allowance multiplied by the number of participants.

4.2.7.5 Business Meals While Traveling

- 4.2.7.5.1 Business Meals are meals taken with University guests, colleagues, or donors during which focused business discussions take place.
- 4.2.7.5.2 When the University traveler pays for the whole meal, including other guests, the University traveler must document attendees and business purpose for the meal.
- 4.2.7.5.3 Business Meals are allowed while traveling, but the University traveler must opt out of per diem for the meal.

4.3 Payment of Travel Expense

- 4.3.1 The University traveler is responsible for submitting a Travel Expense Report that summarizes all travel-related costs, provides supporting documentation, and ensures the Business Services Travel office receives the report with all required approvals within fourteen (14) calendar days after return from trip.
- 4.3.2 Receipts are required for all trip expenses, except personal mileage, meal per diem, private residence stays, and small gratuities.
- 4.3.3 It is the University traveler's and the University traveler's supervisor's responsibility to ensure that expenses for travel are paid by the University only once.
- 4.3.4 Use of University Purchasing Card is the preferred method of payment for expenses, where circumstances allow. Refer to University Policy 222 for reconciliation procedures.
- 4.3.5 Purchase Requisitions may be required in certain situations, such as group or international travel.
- 4.3.6 Use of personal funds may be reimbursed through the Travel Expense Report upon return from trip.
- 4.3.7 A Travel Expense Report that is not filed within fourteen (14) days following the return date of the trip may be denied.
- 4.3.8 Cash Advance

- 4.3.8.1 A cash advance, not to exceed the amount of travel budget, may be provided for student travel only (i.e., a student group or athletic team, etc.).
- 4.3.8.2 A Cash Advance is a short-term loan. Any unused portion of the loan is due within fourteen (14) days from the time the trip was completed.
- 4.3.8.3 Delinquent travel advances may be garnished from the employee's wages if not settled within the required timeline.

4.3.9 Loyalty Programs

- 4.3.9.1 If a University traveler is using a loyalty program for University travel, it is encouraged to apply the benefits toward other University travel.
- 4.3.9.2 The University will not reimburse for points or credits applied.

4.3.10 Local Travel

- 4.3.10.1 All requests for local travel reimbursement must be submitted on an Expense Reimbursement Report with sufficient documentation (i.e., mileage log, origin and destination of each trip, number of miles, and the purpose of the trip).
- 4.3.10.2 Meal per diem is not provided for local travel; however, the University traveler may receive reimbursement for actual meal cost with receipts up to the local GSA rate.
- 4.3.10.3 If a personal vehicle is used, mileage may be reimbursed up to a maximum of the allowed IRS standard mileage rate.

4.3.11 Companion Travel

- 4.3.11.1 It is allowable for a University traveler's spouse, significant other, and family member(s) to accompany a University employee while conducting University business.
 - 4.3.11.1.1 The University traveler is responsible for all additional expenses incurred by a spouse, significant other, or family member(s).
- 4.3.11.2 In the following situations, the University may pay for companion travel expenses:

- 4.3.11.2.1 In accordance with Utah Board of Higher Education Policy R205, the President's spouse may accompany the President on trips, and actual expenses for travel may be paid by the University when deemed beneficial for University purposes.
 - 4.3.11.2.2 Other exceptions must be approved in writing by the President of the University. Such approvals must be for a bona fide business purpose (as determined by reference to the Internal Revenue Service guidelines for Companion Travel).
- 4.3.12 Student and Study Abroad Travel (Refer to Policy 604 for guidelines and University requirements.)
- 4.3.13 Non-Employee Travel
 - 4.3.13.1 Reimbursements may be provided to a Non-Employee who incurs necessary and reasonable travel and business expenses in the conduct of official University activities. To be non-taxable, travel and business expenses for a Non-Employee must be submitted with receipts for all expenses.
- 4.3.14 Volunteer Travel
 - 4.3.14.1 Before a volunteer may travel on behalf of the University, the volunteer must complete the formal process to become a University Volunteer through Human Resources.
 - 4.3.14.2 It is preferred for a University Volunteer to travel with an University employee and that all of the University Volunteer's travel costs be paid directly with a University Purchasing Card by the employee. The employee will note, "Volunteer," on Travel Pre-Approval and reconcile Volunteer's travel expenses on their Travel Expense Report.
 - 4.3.14.3 The Volunteer may submit a Check Request form to be reimbursed for per diem.

V. References

- 5.1 Board of Higher Education Policy R205-3.7.3, Presidential Appointment, Term of Office, and Compensation and Benefits

- 5.2 Fly America Act, 49 U.S.C. 40118 and Open Skies Air Transportation Agreements (U.S. Government Procured Transportation Agreements)
- 5.3 “Large-Capacity Passenger Vehicle Safety Protocols,” Utah Division of Risk Management (See Utah Division of Risk Management website)
- 5.4 U.S. General Services Administration (GSA) Meals and Incidentals (M&IE) Rates
- 5.5 University Policy 221: University Procurement
- 5.6 University Policy 222: Purchasing Cards
- 5.7 University Policy 604: Academic Travel/Study Programs

VI. Procedures

- 6.1 Available from Travel Office: <https://employees.utahtech.edu/business-services/travel-information/>

VII. Addenda – N/A

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