Travel, Lodging and Meals

05.180

Authority: Vice Chancellor for Business Affairs

History: Effective December 15, 1991; updated July 1, 1995; updated February 1, 2007; updated November 20, 2008; April 30, 2010 supersedes former Administration Policy No. TRA1.14, “Travel, Lodging and Meals”

Source of Authority: Office of State Budget and Management

Related Links: Appendix A ‘Rate Table – Transportation, Lodging and Meals; UBusiness

Responsible Office: Accounting Department

I. Purpose

Defines the payment, by the university, of expenses for lodging and meals for official university travel.

II. Scope

Applies to all university departments and activities.

III. Policy

A. General Statement

1. Official travel for the university may result in expenses in addition to transportation. Anticipated lodging and meal expenses must be authorized on the Travel Authorization form, found at UBusiness which can be reached via the ‘Related Links’ section above, prior to the beginning date of travel.

2. Reimbursement is limited to personal costs incurred by the employee making the claim. Original receipts and/or written statements are required to attached to the Travel Reimbursement form, found at UBusiness which can be reached via the ‘Related Links’ section above. Receipts smaller than letter size must be taped on all sides to a letter sized sheet of paper.

3. All documents substantiating travel shall be on file with the University Accounting Department.
4. Notes regarding travel by non-state employees
   
a. Travel by non-state employees does require a Travel Authorization form.

b. However, non-state employees must abide by the same statutory reimbursement regulations, documentation requirements, and other conditions as state employees, unless otherwise indicated

B. Employee Responsibility

An employee traveling on official business is expected to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business and expending personal funds. Excess costs, circuitous routes, delays, or luxury accommodations and services unnecessary or unjustified in the performance of official business are not acceptable under this standard. Employees will be responsible for unauthorized costs and any additional expenses incurred for personal preference or convenience.

C. Penalties and Charges Resulting from Cancellations and or Changes

1. If the employee's travel has been approved in advance and the cancellation or change is made at the direction of (and for the convenience of) the department, any penalties and charges resulting from the cancellation of reservations shall be the department's obligation.

2. If the cancellation or change is made for the personal benefit of the employee, it shall be the employee's obligation to pay the penalties and charges.

3. However, in the event of accidents, serious illness or death within the employee's immediate family, or other critical circumstances beyond the control of the employee, the department can pay the penalties and charges.

IV. Procedures

Record expenses for lodging and meals on the Travel Authorization form and on the Travel Reimbursement form (for each see UBusiness in ‘Related Links’ above). Indicate specific departure and arrival dates and times; and attach appropriate documentation to substantiate lodging expenditures as noted below.

A. Lodging.

1. Lodging Reimbursement Criteria.
   
a. Lodging will not normally be paid when the traveler is in travel status less than 24 hours.
b. Indicate specific dates of lodging on the Travel Authorization form and on the Travel Reimbursement form to document eligibility for lodging reimbursement.

2. Reimbursement Amounts for Lodging.

a. Reimbursement for lodging shall be made for only the actual lodging expense incurred. Therefore, attach the original itemized receipt from a commercial lodging establishment to the Travel Reimbursement form.

b. Reimbursement shall not exceed the per diem lodging rates listed in Appendix A without prior approval as noted below.

c. Reimbursement to employees sharing a room with a member of his or her family shall not exceed the single occupancy rate.

d. Payment of sales tax, lodging tax, local tax, or service fee applied to the cost of lodging is allowed in addition to the lodging rate and is to be paid as a lodging expense.

e. When express checkout is used the receipt must show credit card as method of payment.

3. Excess Lodging.

a. The department head or chairperson may authorize lodging in excess of the per diem lodging rates in Appendix A if more economical accommodations are not available or practical.

b. Justification must be provided stating why the higher cost and supporting documentation must be attached to travel reimbursements.

c. No excess lodging may be granted for internal department meetings, conferences, seminars, etc.; and such meetings must be held in university facilities when available.

d. Request approval for excess lodging for state employees on the Travel Authorization.

e. Request approval for excess lodging for non-state employees on the Travel Reimbursement form.


When an employee stays in a state-owned facility and the lodging charge is less than the per diem rate in Appendix A (see ‘Related Links’ above), the
maximum amount reimbursed will be the actual amount charged.

B. Meals.

1. Meal Reimbursement Criteria.

a. Reimbursement for meals is normally allowed only when overnight travel is involved and when the travel destination is located at least 35 miles from the employee's regularly assigned duty station or home, whichever is less.

b. Indicate specific departure and arrival dates and times on the Travel Authorization form and on the Travel Reimbursement forms to document eligibility for meal reimbursement.

c. All tips for meals are included in the per diem rate allowed.

d. The travel system calculates the meals based on departure and return times of travel and city/state/country of lodging.

2. Meal Reimbursement for Partial Days when Overnight Travel is Involved.

Employees may receive allowances (see Appendix A) for meals for partial days of travel when the partial day is the day of departure or the day of return. To be eligible, the following criteria must be met.

<table>
<thead>
<tr>
<th>Breakfast</th>
<th>Depart prior to 6:00 a.m.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lunch</td>
<td>Depart prior to 10:00 a.m. on day of departure, or Return after 2:00 p.m. on day of return</td>
</tr>
<tr>
<td>Dinner</td>
<td>Return after 8:00 p.m.</td>
</tr>
</tbody>
</table>

3. Meal Reimbursement When Overnight Travel is Not Involved.

Lunches are not normally reimbursed if travel does not include an overnight stay. To be eligible for breakfast and evening meal allowances when overnight travel is not involved, the following criteria must be met.

<table>
<thead>
<tr>
<th>Breakfast</th>
<th>Depart prior to 6:00 a.m., and Extend the normal workday by two hours.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dinner</td>
<td>Return after 8:00 p.m., and</td>
</tr>
<tr>
<td>Extend the normal workday by three hours</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Both breakfast and evening meals</td>
<td></td>
</tr>
<tr>
<td>When overnight travel is not involved,</td>
<td></td>
</tr>
<tr>
<td>the employee must have worked five</td>
<td></td>
</tr>
<tr>
<td>hours longer than the normal workday.</td>
<td></td>
</tr>
<tr>
<td>Applies to all of the above</td>
<td></td>
</tr>
<tr>
<td>The travel must involve a travel</td>
<td></td>
</tr>
<tr>
<td>destination located at least 35 miles</td>
<td></td>
</tr>
<tr>
<td>from the employee's regularly assigned</td>
<td></td>
</tr>
<tr>
<td>duty station.</td>
<td></td>
</tr>
</tbody>
</table>

4. Reimbursement for Meals at Conferences, etc.

When the cost of meals is furnished with registration fees, conference costs, or other related activities, they will be excluded from the travel reimbursement meal per diem, even if the traveler did not attend.

5. Reimbursement for Meals on Commercial Airline.

Employees are permitted to claim meal reimbursement allowances on the Travel Reimbursement form for meals on a commercial airline, even though the meals are shown and offered as a part of the flight schedule.

6. Reimbursement for Meals at Meetings.

a. A state employee may be reimbursed for meals, including lunches, when the employee's job requires his/her attendance at meetings in his/her official capacity and the meal is a pre-planned part for the entire meeting.

b. Contact the Travel Coordinator in the Accounting Office for additional clarification on lunch reimbursement when overnight travel is not involved.

7. Reimbursement Amounts for Meals.

a. Reimbursement for meals shall not exceed the in-state limits when traveling in-state or the out-of-state limits when traveling out-of-state. (See Appendix A.)

b. Reimbursement rates listed in Appendix A include tips.

c. An employee may request reimbursement for actual expense if it is less than the rate in Appendix A.
d. Contact the Travel Coordinator in the Accounting Office to obtain reimbursement rates for foreign travel meals.