

70.02 Travel (University of Idaho) – Draft

Last updated September 16, 2021

A. General.

1. It is UI policy to reimburse employees for expenses incurred while traveling on official UI business. Such reimbursement is subject to all applicable statutes, regulations, contracts, policies, procedures and budget availability.
2. Departmental administrators, along with the Division of Finance and Administration, are responsible for ensuring that travel expenditures comply with the State of Idaho travel policies. Employees are responsible for compliance with all UI policy and procedure relating to travel, including APM 05.08 Vehicle Coverage and Use. Employees are expected to be prudent in making travel arrangements and selecting the lowest cost options available. Any questions regarding this policy should be directed to the Accounts Payable Travel team at travel@uidaho.edu.

B. Definitions

1. **Official Travel Status.** Traveler is physically away from their official station by a distance of 50 miles or more, or their travel includes an overnight stay.
2. **Traveler.** Any person traveling on behalf of the University of Idaho for the purpose of official University business.
3. **In-State Travel.** Travel between locations in Idaho.
4. **Out-of-State Travel.** Travel from within Idaho to a destination outside of Idaho, but within the United States, and U.S Territories.
5. **Foreign Travel.** Travel to/in foreign countries.
6. **Commercial Lodging.** Lodging such as a hotel, motel, or apartment provided to the public for pay during travel requiring overnight absence from an employee's Official Station.
7. **Non-Commercial Lodging.** Lodging during travel requiring overnight absence from an employee's official station for which the traveler does not provide payment (e.g., camping equipment, recreational vehicle or private home).
8. **Official Station.** The city, town or other location to which an employee is assigned.
9. **Per Diem.** Reimbursement for lodging, meal and incidental expenses for a 24-hour period.

C. Eligibility for Travel Expense Reimbursement

1. **Employees.** UI employees are eligible for travel reimbursement for expenses incurred in connection with official travel.
2. **Employees on Leave.** Reimbursement for travel expenses incurred during sabbatical or other types of leave is warranted only in exceptional circumstances.
3. **Unpaid Members of Advisory Committees.** Unpaid members of advisory committees may be reimbursed for actual and reasonable expenses.
4. **Recruitment for Employment.** Reimbursement is limited to travel expenses for personal interview and must be approved in advance by authorized campus personnel. Prior approval is required if reimbursement includes travel expenses for other members of the candidate's family.
5. **New Employees – Household Moves.** New employees may be reimbursed for household moving travel and expenses, subject to the provisions of APM 75.38 Moving Expense Reimbursement for UI Personnel.
6. **Students.** Students who travel as employees or officially designated representatives of a campus may be reimbursed for travel expenses as defined above for employees or unpaid members of advisory committees.

7. Non-Employees and Volunteer Workers. Non-employees and volunteer workers may be reimbursed only for travel expenses incurred in conjunction with providing a service to the institution through a formal or informal contractual relationship.

D. Pre-Travel Authorization

1. Pre-travel Authorization Required. Travel expenses will be reimbursed provided the trip is approved in advance by authorized campus personnel. Authorized personnel may vary by unit but will usually include a supervisor or department financial positions. Requests should be submitted by travelers or staff who are knowledgeable of the State of Idaho policies and University procedures. Individuals submitting requests will be held accountable for compliance with these rules.

2. Blanket Travel Authorization. Blanket travel authorization may be approved for a series of trips that relate to the employee's official job requirements and duties when they require frequent or continuous travel.

3. Advances. Travel advances for per diem and incidentals or travel expenses related to students may be issued by either direct deposit or check payment no more than two weeks prior to the traveler's departure date.

4. International Travel. International travel pre-approval requires additional steps in the approval process. For information concerning international travel, please see APM 70.23.

E. Purchasing Card Travel Expenses

1. General. The University of Idaho provides a corporate purchasing card for small-dollar purchases and for the use of pre-approved business travel expenses. See APM 75.37. To the extent practical, all costs for travel should be incurred using the purchasing card or travel advances to minimize the need for the traveler to incur costs requiring reimbursement.

2. Eligibility. Any current employee who travels or purchases small-dollar items relating to their official duties is eligible for use of a purchasing card.

3. Acceptable Usage. A purchasing card may be used only for business travel and other business expenses, including lodging, meals, car rental and miscellaneous expenses incurred while traveling for business purposes. Expenses not allowed on the purchasing card are costs covered by per diem, mileage or fuel for personal vehicles, personal travel expenses, and travel expenses that involve personal travel.

4. Responsibilities

a. The employee or cardholder is responsible for charges placed on their purchasing card. Consequences of misuse may include disciplinary action up to and including dismissal, personal liability, repayment of all costs for personal expenses, prosecution, and any legal costs incurred by the state in the investigation and prosecution for any misuse of the purchasing card.

b. The cardholder or the cardholder's financial unit is responsible for reconciling the purchasing card in a timely manner and ensuring that the expenses are submitted within 30 days after the traveler has concluded travel. The unit is responsible for notifying the Purchasing Card Administrator when an employee terminates their employment.

F. Travel Expense Reporting

1. General. Travel expenses not paid for via purchasing card or travel advance may be reimbursed to the traveler.

2. Group Expenses. When employees travel together, it may be expedient for one employee to pay and report specific expenses of other employees. Reimbursement for multiple employees is allowed only when actual expenses are being reimbursed and are supported by receipts. For

business-related group meals, deductions are made from the per diem amounts for employees involved. Travel expenses must be submitted through approved University procedures, along with receipts and other required information.

3. Unusual Circumstances. Any changes to the duration of the approved travel resulting from unusual circumstances, such as severe weather, road conditions, airline delays, illness, or other situations beyond the traveler's control, must be fully documented and approved to support the increase or decrease of allowable costs and time resulting from the unusual circumstances.

4. Leave Period during Official Travel. An employee may be permitted to take a period of leave while on a trip authorized for official business. In this situation, the traveler must document the actual costs incurred with a detailed comparison to the amounts that would have been incurred had the trip included only the authorized and required duration and destinations. When submitting the expense report, the employee must document the date and time of the beginning and the ending of the included period of leave. Travel expenses (airfare, lodging, car rental, etc.) related to the personal leave may not be charged to the UI Purchasing Card.

G. Travel Agency Services. A unit may use the services of a travel agency.

H. Student and Team Travel

1. General. Student travel related to the student's employment or educational experiences is eligible for expense reimbursement. Travel authorizations and reimbursements follow the student travel procedures provided in H-2 through H-4.

2. Athletic Team and Student Group Payments. Group leaders who pay all or part of the group's expenses may be reimbursed by submitting a travel expense claim/report for the actual expenses incurred.

3. Student Travel with Employee. If a student travels with an employee, the employee may pay for the student's travel expenses, except meals, on a purchasing card. All student travel charges will need to be reconciled and included on the employee's travel expense report.

4. Student Travel without Employee. If a student is traveling without a non-student employee, the department may pay for student travel expenses, except meals, on a purchasing card.

I. Meals and Incidental Expenses

1. General. Generally, meals and incidental expenses are reimbursed at a per diem rate. The per diem allowance is a fixed amount for a full day of official travel and is not a reimbursement for actual costs incurred. No receipt is required.

2. Per Diem for Partial Days of Travel. Proration of per diem for partial days is required when travel does not involve an overnight stay, when meals are furnished by others or when meals are furnished as part of a business-related meeting or conference. The following percentages shall be applied when prorated per diem is required. The meal allowance is based on the federal per diem for out of state destinations and for the maximum amount allowed within the state of Idaho.

- On the day the trip begins, the traveler is eligible for 100% of the per diem if the trip begins before 12 p.m. (noon).
- On the day the trip begins, the traveler is eligible for 50% if the trip begins after 12 p.m. (noon).
- On the day the trip concludes, the traveler is eligible for 100% of the per diem if the trip concludes after 6 p.m.
- On the day the trip concludes, the traveler is eligible for 50% if the trip concludes before 6 p.m.

For the departure day, the per diem rate is based upon the location of overnight lodging. For the day the traveler returns from a trip, the per diem rate is based upon the last

location of overnight lodging. For more information view the Accounts Payable Website. <https://www.uidaho.edu/finance/controller/accounts-payable/travel-services>

3. Actual Meal Expense Reimbursement.

a. General. Reimbursement for meals at actual expense is allowed only when hosting official guests and groups, for athletic team and student group meal expenses, and for unpaid members of advisory committees. A reasonable gratuity not to exceed 20% of the cost for each meal may also be claimed.

b. Required Documentation. When actual meal expenses are claimed, an itemized receipt is required. The receipt must separate the meal cost and the gratuity paid. When the receipt shows only the total charge, the traveler should write in the meal and gratuity amounts. When one employee claims reimbursement for meals of multiple employees, all employees' names should be identified on the receipt. |

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c. Meals on One-Day Trips. When a traveler departs and returns the same day, meal expenses are reimbursed only in the following cases:

- a. When traveling as an unpaid member of an advisory committee
- b. When a meal at a convention, conference or meeting is part of the agenda and the cost of the meal has not previously been paid with the registration fee
- c. When directed or required to attend mealtime business meetings, including community or public relations meetings
- d. Trips by athletic teams and student groups
- e. Business-related activities that require the traveler to be away their work station for a one-day trip may qualify for expense reimbursement in the following circumstances:
 - i. When an employee leaves their official station two or more hours before their regular work shift, they will receive the breakfast allowance
 - ii. When an employee returns to their official station two or more hours after their regular work shift, they will receive the dinner allowance

4. Incidental Expenses. The term "incidental expenses" includes, but is not limited to, expenses for laundry, cleaning and pressing of clothing, and fees and gratuities for services, such as for waiters and baggage handlers. The term does not include taxicab fares, airport shuttle or bus fares.

- **Telephone.** The cost of a personal telephone call within the US while on official travel status is allowed. The call is limited to one phone call for each full or partial day of official travel through commercial telephone services, not to exceed ten (10) minutes per call.
- **Internet Access.** The cost to access the internet at the temporary work location or lodging vendor for official business is allowable. The cost to access the internet aboard airplanes, or other locations may be allowable, provided that a justification is attached to the travel expense report that such access at the time and location is essential in the performance of university business and is not predominantly for personal convenience or entertainment.
- **Tips and Gratuities.** Tips and gratuities are included in the per diem allowance and cannot be claimed separately, even if the gratuity is unrelated to a meal expense. This includes all amounts related to baggage handling, hotel services, or for which gratuities are usual and customary for the services provided.

- **Laundry and Dry-Cleaning Services.** The cost for laundry and dry-cleaning services is allowable if the duration of the official travel exceeds five (5) calendar days, and if incurred while in travel status.
- **Entertainment.** The costs for entertainment such as in-room movies, video games, pay-per-view television programs or similar items are not allowable.
- **Travelers with Disabilities.** Travelers with disabilities are allowed payments of additional travel expense to accommodate their disabilities, including but not limited to per diem and transportation of an attendant, cost of specialized transportation, increased cost of specialized services for public carriers, or special baggage handling fees.
- **Other.** Expenses not specifically described in these policies but which are necessary in the performance of official university business, when properly authorized and documented, are allowable.

J. Lodging

1. General. Lodging expenses are normally reimbursed when authorized campus personnel determine that the traveler would not reasonably be expected to return to his or her residence between work shifts. Generally, lodging is reimbursed at actual and reasonable cost with appropriate documentation.

2. Selection of Vendor. When selecting a lodging vendor, traveler should consider the proximity to the travel destination, room type, and daily rate. Other amenities or premiums offered by lodging vendors can be considered in the selection process, such as on-site restaurants, internet access availability, free breakfasts and beverages, or other services, but the proximity and daily rate should be the primary consideration. At the time a reservation is made or when registering on-site, travelers should request the "government rate" if available and if it is less than the group or conference rate. University of Idaho Policy requires pre-approvals for all lodging expenses.

3. Required Documentation. Lodging receipts are required and must show the following:

- Traveler's name (or names)
- Date(s) occupied
- Room number
- Number of persons occupying the room
- Single room rate
- Actual amount paid

If the single room rate is not shown, a note on the receipt stating the single room rate and signed by the traveler or authorized campus personnel is acceptable.

4. Non-Commercial Lodging Per Diem. Whether for short- or long-term travel, in or outside of Idaho, the daily per diem is \$25 or the actual expense, whichever is less. The non-commercial lodging rate per diem applies for any overnight stay away from home that does not take place in a commercial lodging establishment and which is provided by the employee. Lodging provided by relatives or other individuals is not an allowable expense unless they are in the business of providing such services which are publicly advertised, and a formal invoice is provided.

K. Foreign Travel Rates for Meals and Incidental Expenses and Lodging

1. General.

If any foreign travel is reimbursed at actual cost, a credit card statement with conversion to U.S. dollars may be presented. Otherwise, expenses may be converted from foreign currencies to US dollars using the conversion rate in the "Foreign Exchange column of the most recent conversion rate." Travelers are responsible for ensuring that proper exchange rates are used.

The Federal Foreign Per Diem rates are available on the U.S. State Department web site: https://aoprals.state.gov/content.asp?content_id=184&menu_id=78, and are updated monthly. From this web site you can view Foreign Per Diem Rates by Location, and download the Excel Version of Foreign Per Diem Rates for the month in which travel occurred, which will take you to the list of rates in effect at that time. The U.S. State Department site lists foreign localities and corresponding per diem rates in U.S. Dollars. The first number following the locality is the per diem lodging rate for commercial travel, the second is the per diem rate for meals and incidental expenses, and the third number is the total per diem rate.

L. Miscellaneous Expenses. Necessary business-related travel expenses are normally reimbursed. Personal expenses are not reimbursed. All expenses require an itemized receipt, unless an exception below applies. Commercial ground transportation requires receipts if over \$75 per item; all other miscellaneous expenses require receipts if over \$25 per item.

1. Expenses Normally Reimbursed

a. Commercial Ground Transportation. Receipts required if over \$75 per item.

- Taxicab
- Airport Shuttle

b. Other Business-Related Expenses. Receipts required if over \$25 per item.

- Fax
- Internet
- Postage
- Materials and supplies purchased to meet an immediate business need
- Visa and passport expenses – Foreign Travel justification for business related purpose
- Parking
- Tolls

2. Expenses Not Reimbursed. In general, expenses are not reimbursed unless specifically identified as reimbursable. The following are some expenses not normally reimbursed:

- Home-to-office travel
- Deviations from the most direct and usually traveled route
- Expenses incurred because the employee is accompanied by a spouse or family members

M. Travel: Mode of Transportation

1. General

a. Selection of Mode of Transportation. Travelers shall use the most cost-effective and efficient mode of travel. Exceptions to this requirement may be allowed due to unusual or unforeseen circumstances that are properly documented and authorized by the approving authority. Any costs associated with excess travel time resulting from the use of other modes of travel for personal reasons shall not be allowed. Travelers must use the most direct or efficient route of travel that considers actual costs and travel time. Additional factors can be considered when selecting the route of travel, such as weather conditions or other issues which could increase travel time or hazards to the traveler.

b. Duration of Travel. The duration of the travel should not exceed the maximum time necessary to conduct UI business for the approved purpose of the travel. Travel time begins when the traveler departs their home on work location and may include arrival at an airport or other point of public transit by the recommended pre-departure time. Actual time while in travel status must be documented on expense reports.

c. Reimbursable Expenses. Transportation expenses incurred while traveling on official business may be reimbursed. Personal expenses, such as private vehicle repair and maintenance, may not. The following expenses may be reimbursed or, excluding private vehicle mileage or private vehicle expenses, can be charged to the purchasing card:

- Private-vehicle mileage allowance
- Common carrier fare
- Necessary fees for a taxi, limousine, airport bus or rental vehicle
- Parking and garage fees

2. Private or Employee-Owned Vehicles

a. Authorization to Use Private Vehicle. Travel including business trips in the vicinity of the official station may be authorized in advance. A pre-approval trip authorization must be on file.

b. Use of Privately Owned Vehicles. Use of a private vehicle for business travel must comply with APM 05.08.

c. Highway- and Local-Mileage Reimbursement. Business-related travel using a private vehicle should use the most direct and usually traveled route.

- **Highway mileage.** Mileage may be based on actual odometer reading or by using online map features to calculate. Travelers are required to explain deviations from standard distances or usual routes. When a trip starts, or ends, at the employee's residence, travelers must use the shorter of the residence-to-destination or official-station-to-destination distances.
- **Local mileage.** Travel between workplaces and travel between lodging and restaurants for a traveler's sustenance, if necessary, for health and comfort, may be reimbursed. Travel for personal reasons or entertainment shall not be reimbursed.
- **d. Vicinity Mileage.** Mileage incurred for official University business within the traveler's official primary work station area or other locations is allowable and may be consolidated on a daily basis and reported as "vicinity travel" on the travel expense voucher and reimbursed at the allowed rate.
- **e. Allowance Rate.** The University shall apply the mileage allowance rate established by the State of Idaho for authorized use of a private vehicle on official business. Under no circumstances is the purchase of gasoline dispensed into a private vehicle an allowable expense in lieu of mileage reimbursement. For a listing of the current mileage allowance rate please review Accounts Payable Web page.
<https://www.uidaho.edu/finance/controller/accounts-payable/travel-services> (under Resource Files)
- **f. Traffic Violations.** Traffic and parking tickets are an infraction of state or local traffic laws and are not reimbursable regardless of whether the traveler is in a personal or university vehicle.

3. Common Carrier. Transportation by common carrier is recommended when it is more efficient and economical than travel by state or private vehicle. Actual business-related expenses for pre-approved travel may be paid using the purchasing card or reimbursed to employees if paid with personal funds, subject to the following restrictions.

a. Railroads. Maximum fares on trains are regular first-class fares. A roomette is allowed when Pullman accommodations are needed. A bedroom is allowed if no roomette is

available or if special accommodations are approved because of the trip's nature or the traveler's health.

b. Bus Lines. Scheduled or charter buses may be used.

c. Taxis, Limousines and Airport Buses. Taxi service, airport shuttles, or other public transit is authorized between terminals, lodgings and workstations. Limousine and airport bus service to and from terminals is authorized if reasonable and justified.

d. Airlines

i. Selection of Fare. The traveler must select the lowest cost fare after considering all cost factors such as “coach” or similar classification. Airfare for other classes and seat selection or other upgrade fees are not allowed unless properly documented that the seat selection, upgrade fees, or class of passage at a higher rate was necessary due to availability, physical limitation, or other factors, and that the ticket was purchased at the earliest opportunity.

ii. Method of Purchase. All business-related airline tickets should be purchased using the purchasing card. However, personal travel or indirect routes for personal reasons must be paid by the traveler and submitted for reimbursement rather than charged to the purchasing card.

iii. Additional Fees. Baggage fees are allowable not to exceed one checked bag and one carry-on bag per departure, unless additional baggage is approved prior to the trip. Any additional costs, such as in-flight services, internet access or entertainment, are not allowable and are the responsibility of the traveler, unless a valid business purpose is identified and approved in advance.

e. Airfare Contract Agreements. The State of Idaho maintains airfare contracts that the UI may utilize when available. These airfare contracts should be used unless it can be documented that a ticket can be purchased for a lesser amount from another airlines.

f. Travel Awards and Frequent Flyer Mileage. All employees are required to travel using routes, schedules and airlines that provide the lowest rates and most efficient travel. Because the cost of record-keeping outweighs any monetary benefit, UI will not recapture airline points awarded employees for frequent flyer miles. Frequent flyer points may be used by employees as they choose unless the terms of a grant or contract require otherwise.

g. Payment in Lieu of Air Travel. When air travel is appropriate for travel, an employee may request in advance to travel by private vehicle in order to provide a more efficient business-related travel plan or combine vacation with official travel. In such a case, an employee may be reimbursed for the following costs associated with alternate travel mode between their official station and destination:

- Mileage to destination is limited to the cost of round-trip commercial air fare that would have been incurred based on a quote from a travel agency or online booking service based on 14-day advance purchase.
- Private vehicle mileage to and from the air terminal that would normally be used for departure. Limited to the trip mileage where the employee is present in the vehicle.
- Lodging, per diem and incidental expenses that the employee would normally incur with air travel.

h. Split Billings. When the University is paying only a portion of an airline ticket, the travel agency splits the bill. This can occur when the employee is combining business and

personal travel, because of budgetary constraints, or when a third party is paying a portion of the cost. The University is charged its appropriate portion and the traveler, or third party is billed the balance. In this case, the business-related portion cannot be charged to the purchasing card and must be paid by the traveler and submitted for reimbursement.

5. Vehicle and Transportation Rentals

1. Authorized Use. Rental vehicles are to be used exclusively for official university business, and are covered through State Risk Management program of risk and insurance (within the US and its territories). The use of a rental vehicle for personal or other non-official business is strictly prohibited. If a traveler wishes to mix personal and business travel, they must conduct university business in a UI-rented vehicle, return the UI-rented vehicle, and check out a rental vehicle for personal use. Personal use rental is not reimbursable, and not covered by university auto coverage.

2. Selection of Vehicle or Other Rental. Travelers must use Account Payable's travel services website to rent a vehicle. State of Idaho contracts provide a contracted rental rate and include liability insurance for the vehicle. If the traveler cannot rent through a state contract, they should consult with UI Risk. Cars, boats, aircraft or other vehicles may be rented when it is determined to be the most effective and cost-efficient means of transportation for performing official business. The size and style of the rental vehicle shall be consistent with travel needs. The selection of a rental vehicle vendor shall consider the overall cost, location, convenience, vehicle type, and the availability of vendors enrolled in statewide contracts. Links to state contracts are available at [Transportation - Travel Services | University of Idaho \(uidaho.edu\)](#).

3. Insurance. The University provides coverage through the State of Idaho for rental vehicles if they are to be used exclusively for official business. If the traveler is unable to use State of Idaho insurance, they should contact UI Risk for advice in obtaining additional insurance. Neither the state nor the purchasing card provides coverage for personal use and a certificate of insurance will not be issued; the employee's or agent's coverage applies. For additional information, see APM 05.08. The UI purchasing card provides vehicle liability insurance for the rental regardless of which leasing company is employed. Employees are encouraged to use their purchasing cards when renting vehicles because of the primary Collision Damage Waiver (CDW) coverage provided.

3. Reimbursement. A vehicle rental will be reimbursed only if it meets the requirements of APM 05.08. Receipts are required for reimbursement. Rental cars may be used in conjunction with travel by common carrier when use is reasonable and authorized in advance. UI personnel are restricted to compact or economy vehicles unless there is a business-related reason approved in the pre-authorization of the trip.

For information concerning travel and expense reporting procedures see <https://www.uidaho.edu/finance/controller/accounts-payable/travel-services/chrome-river>