

# ORED Detailed Travel Guidelines

## Resources

- APM: 70, Travel Management
- <https://www.uidaho.edu/finance/controller/accounts-payable/travel-services>

## Travel Authorization (TA)

- **ALL TRAVEL must be entered and approved in Chrome River, prior to the trip.**
- International travel
  - TA must be entered and approved in Chrome River **at least 30 DAYS prior to the trip** to ensure adequate review time and approval of Export Controls Questionnaire by the Office of Research Assurances.
  - Traveler completes the faculty/staff international travel registration form: <https://www.uidaho.edu/academics/ipo/ui-faculty-staff-opportunities>
  - Traveler to purchase minimum compulsory travel insurance.
  - If using federal grant funding to travel, the traveler must adhere to Fly America Act when purchasing airline tickets. See <https://www.uidaho.edu/research/faculty/resources/fly-america-act>. Contact OSP if you have any questions.
- Personal Travel included in Business Travel:
  - Requires supervisor approval.
  - Personal travel days to be listed on the TA. When submitting the expense claim after completing such travel, the employee should document the date and time of the beginning and the ending of the included period of leave
  - UI Purchasing card cannot be used for any personal travel expenses.
  - Comparison expenses should be obtained at the time of booking services to ensure that the most economic and efficient mode of travel was used for UI business.
- Travel Advances: Up to 90% may be requested at the time the Travel Authorization is requested.

## Per Diem

- See the Travel Management website for rates and per diem. <http://www.uidaho.edu/finance/controller/accounts-payable/travel-services/travel-forms-and-policies/per-diem>
- Meal receipts are not required when claiming per diem. *Please see Itemized Receipts (below) if hosting meals for others.*
- Justification for requesting per diem is required when meals are provided.
- Travel status starts at departure from work site if driving directly to event/airport. If traveler is getting a hotel for the night before departure, travel status begins two hours before airplane departure time.
- Per diem includes incidentals as follows: tips for meals, baggage handlers, hotel services, etc.
- Per diem does not include tips for taxis, shuttles, etc., which are reimbursable expenses.

## Travel Expenses

- Travelers are encouraged to use UI purchasing card for business travel expenses.
  - Allowable on purchasing card: Airfare, lodging, registration, parking, etc.
  - Not Allowable on purchasing card: alcohol, fuel for personal vehicles, fuel for rental vehicles used for personal travel or indirect routes, any expense that is part University business and part personal, and Idaho sales tax for items purchased/rented (hotel rooms, car rentals, etc.)
- Rental cars should be charged to UI purchasing card so that traveler is covered on UI insurance—but do not purchase additional insurance (see Itemized Receipts, Rental Car for more information).

## Itemized Receipts

- All receipts must be itemized and signed by traveler. When allowable, use purchasing card. A credit card receipt does not provide itemization.
- Meals:
  - Receipts are required only if traveler is hosting a meal. A completed Entertainment Form which provides advance approval to spend university funds is also required for hosted meals. Information required on the form includes event name/description and business purpose, a listing of possible attendees and affiliation, and meeting agenda (if applicable).
  - All alcohol charges must be paid for with personal funds and submitted for reimbursement.
- Airfare: Receipts need to include date of purchase, amount, method of payment, ticket number, traveler's name, destination and dates/times of travel. Upgrades and first-class tickets are generally not allowed unless you can provide justification. Please note that TRIP Insurance is NOT an allowable expense.
- Baggage fee: one bag each way is allowable. Justification is needed for additional baggage fees.
- Rental Car:
  - Traveler's department must have the following on file:
    - Traveler's completion certification for online defensive driving course
    - Vehicle use form
    - 3-year driver's record
  - Go to <http://www.uidaho.edu/finance/controller/accounts-payable/travel-services/transportation> to use UI contracts with Enterprise (reduced rates, insurance provided in contract) and Hertz. These sites will automatically fill in UI information. If a different rental car business is used, the traveler will need to provide explanation for not using UI contracts.
  - Provide justification if upgrading rental vehicle.
  - Additional insurance is not a reimbursable item as it is part of the Enterprise contract as well as the UI purchasing card program.
  - Traveler must carry a University Auto Accident Kit
- Lodging:
  - Ask for Government rate, if available.
  - Prior to checkout review receipt for accuracy and that balance is \$0.00.
  - In-State lodging charges should not include tax when paid with a UI purchasing card.
  - Hotel receipt should have single rate. If multiple travelers are staying in the room, identify individuals and function they are fulfilling.
  - Incidental expenses need to be paid using personal funds.
  - Laundry & dry-cleaning expenses are allowable if travel exceeds 5 calendar days
- Conference: Provide registration receipt and agenda.
- Public Transportation: Provide a receipt, reasonable tips are allowed.
- Parking: If using a coin-operated parking meter take a photo to use as the receipt.
- Mileage: Mileage reimbursement is currently .575 cents per mile. Chrome River will compute mileage based on departure from workstation and travel destination. If mileage is not easily determined, traveler can use odometer readings and a detailed mileage log found here: [https://www.uidaho.edu/-/media/Uidaho-Responsive/Files/research/Faculty/ORED-Fiscal-Ops/Mileage\\_log\\_URO.xls](https://www.uidaho.edu/-/media/Uidaho-Responsive/Files/research/Faculty/ORED-Fiscal-Ops/Mileage_log_URO.xls).

## Missing Receipts:

- On personal reimbursement:
  - Traveler completes and signs an Affidavit of Lost Receipt form. <https://www.uidaho.edu/-/media/Uidaho-Responsive/Files/finance/Controller/travel-services/Travel-Forms-and-Policies/ui-affidavit-of-lost-receipt.pdf>
- On Purchasing Card:
  - Traveler contacts vendor for receipts
  - If receipt is not available from vendor, the expense is moved to employee's personal A/R, employee completes an Affidavit of Lost Receipt form, and a reimbursement to the employee is processed.