

Student Affairs Procedure Manual

TRAVEL

Number: SA-515

Subject: Travel Procedures

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Approved by: James Morales, Vice President for Student Affairs

USU Policy: 515 - Travel Policy

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.

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.

Departments are expected to be fiscally prudent while considering appropriate accommodations for travelers.

Written exemption to the following procedures must be approved by the Vice President (VP) or Associate Vice President (AVP) for Student Affairs.

As an institution of the State and the Utah System of Higher Education, the University is subject to the provisions of IRS Accountable Travel plan. See [Publication 463, Travel, Entertainment, Gift, and Car Expenses](#).

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](#) (PDF). You must report the payments as income, and you must complete [Form 2106](#) (PDF), *Employee Business Expenses*, or [Form 2106-EZ](#) (PDF), *Unreimbursed Employee Business Expenses*, and itemize your deductions to deduct your expenses. See [Publication 463](#) 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).

- The TA is an estimation of all foreseeable travel costs and constitutes the required approval.
- The Travel Reimbursements (TR) documents actual expenses incurred during travel and where reimbursable documents are attached. Trips not needing reimbursements are archived.

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 do not guarantee travel approval. The VP/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 all-card/traveling card, denial of travel reimbursement, and/or revocation of traveling privileges.

TRs need to be submitted through ServiceNow, within 5 business days of return and include:

- Receipts including TA number
- Required Meal & Entertainment forms

Reimbursement for group travel will be processed upon submission of all-party receipts.

TAs will be archived after 5 business days of return. Had a personal reimbursement been owed, written approval for reimbursement will be required by the traveler's supervisor and VP/AVP, prior to processing.

1.3 AFTER-THE-FACT TRAVEL

All after-the-fact travel must to be approved by the VP/AVP of Student Affairs. Traveler is in jeopardy of termination of all-card/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 may 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 remainder of \$5. The \$5 will be taken from the student club index to cover the shortage.

1.5 MOTOR POOL/RENTAL VEHICLES/PRIVATE AUTOMOBILE

- Travelers using their private automobile may be reimbursed up to .50 cents per mile.
- Google map mileage explanation and/or mileage log must be submitted for mileage reimbursement.

SA-515.2 MEALS

Student Affairs covers meal costs at actual rates (reimbursements require itemized receipts) not to exceed the University Per Diem rates (https://travel.usu.edu/travel_procedures).

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>).

SA-513.3 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-515.4 FAMILY TRAVEL

Companions (not employed by USU) accompanying traveler on University business:

- (1) Need pre-approval of Vice President for Student Affairs to travel for Bona Fide trips (www.usu.edu/controller/acctpay/forms/companiontravelapproval.pdf);
- (2) Are not covered by University insurance; and
- (3) Passengers under the age of 18 are prohibited from riding in Motor Pool vehicles.
- (4) Traveler purchasing meals with a University p-card should keep transactions separate.

SA-515.5 GIFTS/MEALS/REFRESHMENTS

- As a state employee, traveler is NOT permitted to receive or solicit a bribe 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](#).
- As long as there is not an active RFP, employees may occasionally accept a gift from a private vendor, eat a meal paid by a private vendor, or have refreshments at a reception hosted by a private vendor. The value of the gift, the employee’s meal, or refreshments eaten by the employee may not exceed \$50 per occasion.

SA-515.6 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-515.7 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-515.8 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.

SA-515.9 CITATIONS

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

SA-515.10 EXCEPTION

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 VP/AVP.

REFERENCES

Wage and Tax Information

[Form W-2](#)

Employee Expenses

[Form 2106](#)

[Form 2106-EZ](#)

Utah Division of Fleet Operations

<https://fleet.utah.gov/state-travel-a/in-state-per-diem-rates-1/>

U.S. Department of Energy: Energy Efficiency & Renewable Energy

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

USU Policy 515: Travel Policy

<http://www.usu.edu/hr/files/uploads/Policies/515.pdf>

USU Travel Office procedures

https://travel.usu.edu/travel_procedures

Utah State Legislature: Utah Public Officers' and Employees' Ethics Act

<http://le.utah.gov/xcode/Title67/Chapter16/67-16-S5.html>