

Policy 3-030: Travel Policy

Revision 19. Effective date: May 20, 2025

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I. Purpose and Scope**A. Purpose**

This policy and the associated rules set forth university requirements for authorizing official university business travel, determining travel expenses that can be covered by the university, and accomplishing the reconciliation and reimbursement process.

B. Scope

Except as otherwise noted, this policy and related regulations apply to all individuals engaged in University Travel whether employees, associates, or other individuals (including students) traveling on official university business. Travel expenses paid by the university must be incurred for official university business.

II. Definitions

The following definitions apply for the limited purposes of this policy and any associated regulations.

- A. "Account Executive" means an individual responsible for the administration of funds available to and expended by an entity or project.
- B. "Contracted Travel Agency" means the travel agency that University Travel Services contracts with to book University Travel.
- C. "Guest Traveler" means an individual who is traveling on behalf of the university but is not employed by the university.
- D. "In-Lieu-of-Airfare Rate" means a rate of reimbursement for modes of travel other than air transportation, which is based upon the lesser of a rate established by contract between the university and a specific airline or the lowest practical airline fare (including applicable discounts, special fares, charters, etc.) available for airline flights that reasonably accommodate the Traveler's schedule.
- E. "Service Class" means the category of airline service, such as economy, business class, or first class, that is recognized by airlines and used to determine the types of flights that are within policy for University Travelers.
- F. "Schedule of Allowable Rates" means the list of the maximum reimbursement amount for University Travel expenses, which, where applicable, is based on the General Services Administration (GSA) rates.

- G. "Travel and Expense System" means the online system, accessed through the portal, used for pre-approval for University Travel and for travel booking (airline tickets, commuter trains, and hotel and rental car reservations) and expense processing.
- H. "Travel Card" means a university issued credit card issued to an employee's name to be used for University Travel expenses.
- I. "Travel Department" means the university employees who support the travel and expense system and travel processes.
- J. "Traveler" means an individual on University Travel. Travelers are primarily university employees but may also include other individuals traveling on university business, such as students.
- K. "University Travel" or "University Travel Status" means travel on university business to a location that is at least 100 miles away from the individual's normal place of employment (or home for an individual who is not an employee) for at least 10 hours. University Travel usually requires an overnight stay. University Travel does not include commuting between an employee's home and regular place of employment or interim periods of time scheduled primarily for the convenience of the traveler, including side trips, layovers, and late returns that are not necessary for the conduct of university business.
 - 1. "Domestic Travel" means University Travel within and between any of the 48 contiguous United States, Alaska, Hawaii, or the District of Columbia.
 - 2. "International Travel" means University Travel to any country outside the United States (including Mexico and Canada) or territory outside the continental U.S., Alaska, and Hawaii, including to noncontiguous U.S. locations of American Samoa, Guam, Midway Islands, Northern Mariana Islands, Puerto Rico, the U.S. Virgin Islands, and Wake Island.

III. Policy

A. Travel Request

1. A Traveler must submit a travel request through the Travel and Expense System prior to all University Travel.
2. A Traveler may not approve travel, cash advances, prepaid expenses, or expense reimbursements for themselves. Such costs must be approved by an authorized higher level of authority.
3. The university president may approve the president's own travel and travel reimbursements. The university's internal auditor should review the president's travel and travel reimbursements and provide a periodic report to the Audit Committee of the Board of Trustees in a format approved by the Audit Committee.

B. Allowable Travel Rate

1. Reimbursement of travel-related expenses is subject to compliance with the provisions of and the rates specified in the Schedule of Allowable Travel Rates in effect when the travel occurred. The Schedule of Allowable Travel Rates may be revised by the president or president's designee.

C. Travel Reconciliation and Expense

1. A Traveler should use the Travel and Expense System to reconcile airfare charges and Travel Card charges and to request reimbursement for University Travel.
2. A Traveler's expenses may not be reconciled and reimbursed until after the University Travel is complete.
3. To receive reimbursement, the traveler must include the documentation described in Rule R3-030A.

D. Policy Enforcement and Compliance

1. The Travel Department conducts regular audits to ensure compliance with travel policies and rules.

2. Travelers are required to follow the travel program guidelines. Persistent noncompliance will be addressed as it creates inefficiencies and appropriate actions will be taken.

E. Exceptions

1. A cognizant vice president may authorize individual exceptions to this policy and related regulations upon written justification showing cause for noncompliance.

Sections IV- VII are for user information and are not subject to the approval of the Academic Senate or the Board of Trustees. The Institutional Policy Committee, the Policy Owner, or the Policy Officer may update these sections at any time.

IV. Policies/ Rules, Procedures, Guidelines, Forms, and other Related Resources

A. Policies/ Rules

1. Rule R3-030A: University Travel Payment and Allowable Expenses
2. Rule R3-030B: Group Travel
3. Rule R3-030D: International Travel Safety and Insurance

B. Procedures, Guidelines, and Forms

1. Procedure P3-010A: Wire Transfer Procedures

V. References

VI. Contacts

The designated contact officials for this regulation are:

- A. Policy Owner(s) (primary contact for questions and advice): Associate Director of Travel Services
- B. Policy Officer(s): Chief Financial Officer

See Rule 1-001 for information about the roles and authority of policy owners and policy officers.

VII. History

Revision History.

A. Current version. Revision 19.

1. Presented for the information of the Academic Senate on April 28, 2025, and approved by the Board of Trustees on May 20, 2025, with effective date of May 20, 2025.
2. Legislative History
3. Editorial Revisions

B. Previous versions.

1. Revision 18. Effective date February 12, 2019
2. Revision 17. Effective date. July 21, 2010
3. Revision 16. Effective date. April 27, 2010

C. Renumbering

1. Renumbered from Policy and Procedures Manual 3-10