

Memo to: All UH-Downtown/PS Holders UH-Downtown/PS 01.A.08  
From: Juan Sánchez Muñoz, President Issue No. 6  
Subject: Travel Policy Effective date: 09/06/2019  
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## 1. PURPOSE

The University of Houston-Downtown (UHD) recognizes business travel is essential to its operations. This document provides guidelines for business travel on behalf of the University, paid from all sources of funds, and is intended to be equitable to both the traveler and the institution. Information in this document provides basic policies and procedures to be followed by each traveler on university business and ensures that all university business travel is conducted in accordance with Board of [Regents Policy 55.03, Travel Reimbursement, SAM 03.A.03, Business Travel](#), and [Texas Government Code, Chapter 660](#).

## 2. DEFINITIONS

- 2.1 Central Bill Account – Credit card account contracted by the State of Texas for Hotel and Airfare charges reserved and booked through UHD Travel Office.
- 2.2 City Pair – Cities between which university travel is undertaken.
- 2.3 Contract Travel Agency - Travel Agency under contract to the State of Texas or designated by the University of Houston-Downtown to provide travel services to state and/or university employees, students and others traveling on university business.
- 2.4 Contract Vendor – For this document, an airline, vehicle rental agency, charge card which the state or university has contracted or designated to provide services.
- 2.5 Days Spent on Business Activities - Includes days in which (1) the principal activity for that day was conducting university business, (2) the traveler was required to be present at a specific date and time for a business meeting, even if most of the day was not spent on business activities, (3) travel days to and from the business destination (not including travel to or from personal destinations or non-business side trips), and/or (4) non-working days, weekends, and holidays that fall between days in which business was conducted.

Travel days to and from the business destination are considered business days generally for foreign travel. For domestic travel, travelers may claim travel days without business activities as business days only if they provide a sufficient explanation in the Expense Report. For example, travelers may claim a travel day to the business destination if the meeting on the following day starts early in the morning, or they may claim a travel day from the business destination if the conference on the previous day ended late in the evening.

- 2.6 Department Travel Card – Charge card contracted by the State of Texas that may be used to purchase airfare, lodging, registration fees, and other centrally billed travel expenses for authorized university travel. Department Travel Cards are issued in the name of the department and are maintained by UHD Travel Office.
- 2.7 Designated Headquarters - The geographic location in which the employee’s place of business is located. In most cases, Houston is designated headquarters for University of Houston-Downtown employees.
- 2.8 Direct Billed Account – Accounts set up for rental vehicle reservations and billing.
- 2.9 Duty Point – The location other than the employee’s place of employment to which the employee travels to conduct official university business.
- 2.10 Export Controls and Travel Embargo – Federal Regulations, Export Administration Regulations (EAR) and International Traffic in Arms Regulations (ITAR), prohibit the transport of certain items when traveling outside the U.S., regardless of the type of funds used to pay for the travel. Additionally, the Office of Foreign Assets Control (OFAC) may prohibit travel to embargoed countries even when exclusions to EAR and ITAR apply.
- 2.11 Foreign Travel – Includes travel by university employees and prospective employees to and from all countries outside Canada, Mexico, the United States and U.S. territories and possessions.
- 2.12 Hotel Card – Charge card contracted by the State of Texas and issued in the name of the university. Issued by UHD Travel Office to university employees using hotels that request physical credit card at time of check-out.
- 2.13 Local Funds – Funds collected at the University for goods and services, and provided by non-state grant and contracts, or provided by donors, as opposed to funds appropriated by the Texas Legislature in the General Appropriations Act.
- 2.14 Lodging - A commercial lodging establishment such as a motel, hotel, inn, apartment, house or similar establishment that provides lodging to the public for pay. This includes lodging provided by a governmental entity on property controlled by that entity, a religious organization on property controlled by that organization, or a private educational institution on property controlled by that institution ([Texas Government Code, Section 660.002](#)).
- 2.15 Travel Request – The form used to request and authorize official university travel in advance of the trip.
- 2.16 Travel Voucher – The form used to reconcile all expenses, centrally billed, directed billed, out of pocket and third party, related to a trip. All receipts and supporting documentation are to be attached to this form.

- 2.17 Official Business – Business required to perform the duties of the university position held, in accordance with the legal responsibilities of the university
- 2.18 Official Travel Status: The time period between leaving and returning to designated headquarters for approved official travel.
- 2.19 State of Texas Comptroller of Public Accounts (CPA): The State of Texas agency with authority and responsibility for regulating procurement and travel for state agencies.
- 2.20 University Guest – An individual who voluntarily and without compensation provides recognition or support to the university in contribution to the university’s mission. This person may be a donor, potential donor, volunteer, or community, government, university or corporate official. It does not include current faculty, staff, or students of the university or persons paid an honorarium or a fee for contracted services.

### 3. POLICY

#### 3.1 Advanced Approval of Travel

All travel requests that involve any University source-of funding must be approved in advance by all appropriate levels of approval prior to the commencement of the trip. The required approval is documented by the completion and submission of a UHD [Travel Request Form](#). The purpose of the trip must be for official university business.

- 3.1.1 Travel by faculty will be approved by their department chairs and appropriate dean.
- 3.1.2 Travel by department chairs will be approved by their deans.
- 3.1.3 Travel by deans will be approved by the Senior Vice President for Academic and Student Affairs and Provost.
- 3.1.4 Travel by staff will be approved by their immediate supervisors.
- 3.1.5 Travel by the Senior Vice President for Academic and Student Affairs and Provost, Vice President for Administration and Finance, Vice President for Advancement and External Relations, and Vice President for Employment Services and Operations will be approved by the President or President’s designee.
- 3.1.6 Travel by the President will be approved by the Chancellor of the University of Houston System or designee in accordance with [SAM 03.A.03, Business Travel](#).
- 3.1.7 Travel funded by Ledger 5 cost centers must be approved by the Assistant

Vice President for Research and Sponsored Programs or his/her designee.

### 3.2 I.R.S. Limitations on Combined Business and Personal Travel

3.2.1 Travel Primarily for Personal Reasons in the US – When the number of ‘days spent on business activities’ is less than or equal to the number of days spent on personal travel, the cost of traveling to/from the destination (airfare, mileage to/from airport, airport parking, etc.) may not be directly charged to the university or reimbursed. Only the expenses that are directly related to conducting business may be charged to or reimbursed by the university, such as lodging and meals on ‘days spent on business activities,’ and local transportation costs to/from business meetings.

### 3.3 Foreign Travel

3.3.1 All foreign travel, other than to Canada or Mexico, must have the prior written approval of the President or President’s designee. Additionally, all foreign travel by a university employee on state business, paid for with state funds, must be approved by the Governor’s Office a minimum of thirty (30) days prior to the date of the employee’s travel. Approval forms may be obtained from the Travel Office.

3.3.2 Travel to any territory of the United States is not considered foreign travel.

3.3.3 If an employee requests approval to travel to a nation under a U.S. Department of State travel advisory warning against or restricting travel by a U.S. citizen to that nation, then the employee must sign a statement indicating that he/she is aware of the travel advisory and potential risks associated with travel to the nation under the advisory.

3.3.4 Issuance of Department Travel Cards for use in case of emergency, i.e. political or social unrest, natural disasters and medical emergencies is mandatory for all student group travel and available to UHD employees traveling to foreign countries.

3.3.5 Approved travel requests must be reapproved if the departure or return date changes by more than 168 hours (7 days), or if expenses increase by more than 10 percent.

3.3.6 All employees who travel to destinations outside the United States must complete the [Export Controls and Travel Embargo Form](#) and receive approval from the Office of Research and Sponsored Programs (ORSP), if required, before leaving on the trip. This requirement applies to all employee business travel outside the United States, regardless of the source of funds used to pay for the trip or whether the University pays for any of the trip expenses.

3.3.7 The completed Export Controls and Travel Embargo Form must be attached to the Travel Request, and uploaded as supporting documentation to any University-paid or reimbursed travel expense (e.g. voucher or travel card) for employee business travel outside the United States.

3.3.8 Employees are advised to complete the Export Controls and Travel Embargo Form as early as possible to allow adequate time for the ORSP to request a license from the responsible federal agency, if required. Most travel outside the U.S. will not require a license, but if a license is required, it could take up to six months to process by the federal agency.

#### 3.4 Travel Vendors

3.4.1 The [State Travel Management Program \(STMP\)](#) contracts with travel vendors, which should be used when available. These vendors include airlines, hotels and motels, automobile rental agencies, and travel agencies. Names and rates of current State contract travel vendors are available in the Travel Office.

3.4.2 If the employee is not using the State approved vendor for airfare, unless the president or president's designee approves a higher fare (i.e., business supporting documentation must be attached to the travel request. The supporting documentation should include a current written quote from the UHD Travel Office. Since rates vary considerably, only a current written quote issued on the date that the travel request is submitted may be used. Faxed current quotes will be acceptable. This documentation must be presented for department approval and must be attached to the travel request forwarded to the Travel Office.

3.4.3 Airfare purchased for domestic and foreign travel must be purchased at the lowest price available (i.e., coach class), regardless of source of funds used. Business class or first class tickets may be purchased only for one of the reasons below:

a. First class airfare may be paid or reimbursed only if it is medically necessary or other airfare is not available.

b. Business class airfare may be paid or reimbursed only if it is medically necessary or a lower airfare is not available.

The necessity for business or first class airfare must be stated on the travel request or attachment to the travel request and approved by the president or president's designee. Travelers may use their frequent flyer miles to upgrade their seating assignment as long as there is no additional cost to the university.

- 3.5 All travel arrangements should be made through the contracted Travel Agency.
- 3.5.1 Reservations will be booked by the department using the Travel Request number assigned by the UHD Travel Office, and sent to the department via email.
- 3.5.2 Reservations permit room sharing provided that the number of guests accommodated equals the number of beds.
- 3.6 Unused Prepaid Airline Tickets. In the event a particular trip is not taken and an airline fare for that trip was purchased using the university's Central Billed Account for Airfare, the cancellation should be reported to the Travel Office immediately.
- 3.7 Travel Funded by Grants and Contracts. When travel is funded by a grant or contract with guidelines different from those of the State, University of Houston System or UHD, the more restrictive guidelines will apply.
- 3.8 Travel Funded by Third Parties (no or partial university funds involved). When travel is funded by a third party, full disclosure of the purpose and nature of the travel is still required for UHD documentation. An approved [Travel Request Form](#) should document total amount or percentage of travel expenses paid by third party.
- 3.9 Travel to Washington, D.C. When travel to Washington, D.C. will be paid in part or in whole from state- appropriated funds, and the purpose of the travel is for activities that involve obtaining or spending federal funds or that impact federal policies, the [Texas Office of State- Federal Relations \(OSFR\)](#) must be informed about the trip. The OSFR must be notified no later than seven calendar days prior to the beginning of travel. The [Texas Office of State-Federal Relations \(OSFR\) form](#) must be filled out and emailed to [OSFR@gov.texas.gov](mailto:OSFR@gov.texas.gov).
- 3.10 Insurance. To maintain insurance coverage, prior approval on a [Travel Request Form](#) is required for all University travel regardless of funding sources or means of travel.
- 3.11 Failure to Comply. Failure to comply with the Travel Policy may result in an employee being unable to recover travel expenses.

## 4. PROCEDURES

- 4.1 Making Travel Reservations
- 4.1.1 Contact Travel Agency for a quote for the trip being planned with the following information on hand:
- a. Traveler's profile information
  - b. Dates of travel – start and end dates
  - c. Preferred travel times
  - d. Airport location preference (e.g. Hobby or Intercontinental)

- e. Hotel choices
- f. Rental car

- 4.1.2 The agent will email the quote to the departmental Travel Arranger and the Traveler referenced with the Traveler's last name and the first date of travel.
- 4.1.3 The travel arrangements per the email must be confirmed by the Travel Arranger and the Traveler which includes selected flights, hotel and rental car.
- 4.1.4 All inquiries or requests for quote changes must be referenced by the Traveler's last name and first date of travel.
- 4.1.5 After changes have been updated and confirmed as the desired arrangements, a Travel Request form must be completed. The Travel Request form must be approved by all of the appropriate signatories, and forwarded to the Travel Office along with the confirmed quote and any other supporting documentation to be processed. No reserved arrangements can be made without an approved Travel Request received and on file in the UHD Travel Office. This process is highly time sensitive, and delays will affect the cost and availability of airfare and hotels.
- 4.1.6 Conference hotels must be held by the traveler's personal credit card to secure a room and/or *early bird* rates. Forward the approved Travel Request with proof of use of the personal credit card for the hotel to the UHD Travel Office, and the hotel room will be transferred from the traveler's personal credit card to the UHD CBA credit card. The Contracted Travel Agency cannot reserve conference hotels.
- 4.1.7 Upon the UHD Travel Office's receipt of the approved Travel Request form, the desired travel arrangements will be booked by the Travel Agency, and confirmed by email. The confirmed booking email will be sent from the Travel Agency to the Traveler, Travel Arranger, and the UHD Travel Office.
- 4.1.8 The Traveler and Travel Arranger are responsible for again verifying that the desired arrangements have been booked. Errors must be reported to the Travel Agency immediately to resolve.
- 4.1.9 A copy of the fully approved Travel Request will be emailed to the Traveler and the Travel Arranger to be included in the documentation for the Travel Reimbursement Voucher that must be completed after every trip, even if no reimbursements are being sought.

## 4.2 Department Travel Cards

- 4.2.1 Department Travel Cards can be requested via an approved Travel Request

with the appropriate box(es) selected in the “DART/HOTEL MasterCard Information” section of the Travel Voucher.

- 4.2.2 The Department Travel Card will be used for student group travel (domestic and foreign), and will be issued to the Trip Coordinator and designees (UHD employees) who will accompany students and enhance the learning experience. Student Group travel includes, but is not limited to Study Abroad and programs offered by Sports and Fitness, Student Activities, Talent Search and Upward Bound.
- 4.2.3 The Trip Coordinator will designate 1-2 employees, dependent on the size of the group traveling, to receive a credit card for the approved trip. The Travel Request must indicate the dollar amount of approved incidentals to be loaded to the card(s).
- 4.2.4 The Trip Coordinator and designee(s) must go to the UHD Travel Office prior to the commencement of the trip to discuss incidental dollars. The guidelines for card usage will be discussed, and cardholders will sign the Acknowledgement of Credit Card Terms and Conditions Form. Cards must be returned to the UHD Travel Office immediately upon return from the trip.
- 4.2.5 The Travel Supervisor will research and determine the dollar amount needed for one-way airfare for the group in the event an emergency exit is needed from a foreign country. The predetermined amount will be split and loaded amongst the Department Travel Cards.
- 4.2.6 All original receipts for purchases made with the Department Travel Card must be turned in to UHD Travel Office along with the Department Travel Card upon return from the trip.  
  
Original receipts will be used as backup documentation for payment to the MasterCard Credit Company for trip charges.
- 4.2.7 The travel receipt copies will be used by the department as backup for the Travel Voucher(s) to be completed for all UHD employees that accompanied the students on the trip whether reimbursement is being sought or not. Incidental money spent using the Department Travel Card will be included on the Travel Voucher as incidentals, and then deducted with the other direct billed items to arrive at the net reimbursement dollars to the employee or to \$0.00.
- 4.2.8 Administrative Staff will also use the copies of the receipt as backup documentation for monthly verifications.

### 4.3 Travel Reimbursement



Travel expenditures must be documented on a State of Texas [Travel Voucher](#).

- 4.3.1 The [Travel Voucher](#) must contain separate statements as to the purpose of the travel and the benefit derived by the university. These statements must address any intermediate stops and/or layovers en route.
- 4.3.2 Expenditures must be itemized on the [Travel Voucher](#) and supported by appropriate receipts, as required. A travel voucher must be submitted even if no reimbursement is sought.
- 4.3.3 All expenses must be documented with receipts with the exception of per diem meals.
- 4.3.4 Employee cash travel advances are prohibited. Student travel group advances and individual foreign travel requiring extended stay living arrangements are allowed with appropriate Vice President approval.
- 4.3.5 UHD will purchase airline tickets in advance of actual travel for employees, prospective employees, and students. This may be accomplished by submitting a properly completed [Travel Request Form](#) to the Travel Office.
- 4.3.6 All mileage must be calculated using [Google Maps](#). Mileage must be itemized on mileage log with point-to-point detail. The number of reimbursable miles may not exceed the number of miles of the most cost-effective reasonably safe route between two duty points. In determining the most cost-effective reasonably safe route, a state agency may consider the route that provides the shortest distance, the quickest drive time or the safest road conditions. Mileage is only calculated from employee's residence when travel occurs outside of normal business hours.
- 4.3.7 All hotel reservations will be booked at the lowest rate possible, normally the State Rate (in Texas) or the conference rate. Requests to book hotels different from the conference hotel or at a rate higher than the state rate or conference rate must be accompanied by an approved request with appropriate justification.
- 4.3.8 Travel reimbursements must be submitted no more than sixty (60) days after the expense has been incurred. Per IRS Regulations, reimbursements issued after 60 days are considered taxable income and will be reported to the IRS as such.
- 4.3.9 Signature approvals will be on the [Travel Voucher](#) and must include traveler and supervisor signatures, as well as budgetary authority and all other appropriate signatures.

#### 4.4 Registration Fees

Registration fees can be paid directly to sponsoring organizations in advance by Voucher, P-Card, or reimbursed to the traveler. The traveler may be reimbursed for registration fees along with other travel expenses after the trip is completed. Proof of payment (i.e., receipt, cancelled check, credit card statement) must be provided for reimbursement of registration fees.

#### 4.5 Incidental Expenses

Incidental expenses must be itemized and supported by receipts as backup documentation and attached to the [Travel Voucher](#).

Reimbursable incidental expenses on local funds include:

1. Hotel occupancy or similar taxes
2. Telephone calls (only related to university business)
3. Gasoline charges when rented or university-owned or university-leased motor vehicles are used
4. Toll charges
5. Repair charges when a university-owned motor vehicle is used
6. Copying charges
7. Passport or visa charges, departure taxes, and inoculations for foreign travel
8. Postage
9. Notary fees
10. Charges to exchange U.S. currency for foreign currency and vice versa. The exchange rate used for conversion of monies must be stated
11. Travelers check charges
12. Mandatory charges by a commercial lodging establishment other than the room rate
13. Books or documents purchased for and while attending a seminar or conference.
14. Tips for baggage handling or other services where it is customary to tip. Discretion must be used to ensure tips are given only in appropriate circumstances and for appropriate amounts, not to exceed 20% of the amount charged

15. Facsimile charges
16. Parking
17. Laundry and dry cleaning expenses incurred during travel for a trip lasting longer than six days.

4.6 Non-reimbursable travel expenses include, but are not limited to:

1. Movies (in a hotel or theater), sporting events, concerts, and plays
2. Expenses involving only the consumption of alcoholic beverages (i.e., without food)
3. Any expense not relating to official university business
4. The portion of any expense considered lavish, extravagant, or unnecessary to accomplish university business in view of the circumstances

## 5. REVIEW PROCESS

Responsible Party (Reviewer): Vice President for Administration and Finance

Review: Every three years on or before May 1<sup>st</sup>.

Signed original on file in Employment Services and Operations

## 6. POLICY HISTORY

Issue #1: 12/15/87

Issue #2: 07/12/00

Issue #3: 03/01/11

Issue #4: 10/10/13

Issue #5: 06/18/16

## 7. REFERENCES

[Texas Office of State-Federal Relations \(OSFR\)](#)

[SAM 03.A.03](#)

[Texas Government Code Chapter 660](#)

[IRS Publication 463](#)

[Travel Request Form](#)

[Travel Voucher](#)

[Google Maps](#)

[Export Controls and Travel Embargo Form](#)