

Memo to: All UH-Downtown/PS Holders

UH-Downtown/PS 01.A.08

Issue No. 5

From: William Flores, President

Effective date: 06/08/2016

Page 1 of 8

Subject: Travel Policy

1. PURPOSE

The University of Houston-Downtown 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 Contract Vendor – For this document, an airline, vehicle rental agency, charge card which the state or university has contracted or designated to provide services.
- 2.3 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.
- 2.4 Direct Billed Account – Accounts set up for rental vehicle reservations and billing.
- 2.5 Duty Point – The location other than the employee's place of employment to which the employee travels to conduct official university business.
- 2.6 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.
- 2.7 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.
- 2.8 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.

- 2.9 Travel Request – The form used to request and authorize official university travel in advance of the trip.
- 2.10 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.
- 2.11 Official Business – Business required to perform the duties of the university position held, in accordance with the legal responsibilities of the university
- 2.12 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 Approval

All travel requests that involve any University sources-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.
- 3.4 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 UHD Travel Office.

3.5.1 Reservations are made based on the approved Travel Request Form only.

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 form must be filled out and submitted online at the [Texas OSFR website](#).
- 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 Travel Reimbursement

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

- 4.1.1 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.
- 4.1.2 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.
- 4.1.3 All expenses must be documented with receipts with the exception of per diem meals.
- 4.1.4 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.
- 4.1.5 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.
- 4.1.6 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.

4.1.7 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.

4.1.8 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.

4.1.9 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.

4.2 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.

4.3 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.
- 4.4 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. EXHIBITS

There are no exhibits associated with this policy.

6. REVIEW PROCESS

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

Review: Every three years on or before May 1st.

Signed original on file in Employment Services and Operations.

7. POLICY HISTORY

Issue #1: 12/15/87
Issue #2: 07/12/00
Issue #3: 03/01/11
Issue #4: 10/10/13

8. 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](#)