CRCD Travel Procedures

To: CRCD Faculty & Staff

Purpose: To describe the implementation of UA Travel Regulations

General Guidelines

CRCD follows the UAF established travel regulations for requesting and reimbursing travel. It is the responsibility of the traveler to submit travel authorizations (TA/AT) and travel expense reports (TER/ER) within the established timeline. Please contact the travel coordinator at your campus if you have any questions concerning these procedures.

Travel Request Form

Please complete this form in its entirety to provide your travel coordinator the necessary information to complete your travel arrangements (attached).

What to Include:

The following items should be included on or submitted with the travel request:

- The business purpose or reason for travel must be clearly explained (R05.02.060 2.h.). CRCD travelers must include the type of travel and dates of travel.
- Dates of business activity.
- Dates of personal days. These days should be reported as leave on your time sheet, if appropriate (R05.02.060 5.a.1.).
- If personal days will be taken in conjunction with travel, a cost comparison between business only travel and business with personal travel must be included showing the most direct routes and/or efficient modes for business purpose – please see your campus travel coordinator to complete this comparison.
• If attending a conference, a copy of the agenda or the link to the webpage containing the agenda must be submitted
• Conference registration fees. Indicate on the request who will be purchasing the registration (i.e. personal card, dept. ProCard, or Business Office)
• Indicate if you want the Business Office to purchase your airfare. This is the preferred method of purchase as the Business Office Travel Coordinator can use multiple methods to lower the cost.
• If lodging is more than 1.5 times the per diem limit for that location, a business reason for the higher cost must be included (R05.02.060 3.c.2.).
• Per diem or projected cost of meals
• Funding to pay for travel. Please leave account code section blank. You should only have to complete the Fund (6 digits) and Org (5 digits). Please contact your fiscal officer if you are unsure of the funding source.

**Deadlines:** The following deadlines apply to submission of the travel request form/TA/AT. If the deadline is not met, a short explanation of the reason for missing the deadline must be submitted to the Business Office Travel Coordinator (an email is fine). Please be aware that missing the deadline will probably mean that airfare and/or other travel expenses will be higher than originally planned.

• Out-of-State Travel: Deadline for submission of TA to the Business Office with all approvals is two weeks prior to scheduled departure.

• In-State Travel: Deadline for submission of TA to the Business Office with all approvals is seven days prior to scheduled departure.

**Airfare:** If notified on the TA, the Business Office will purchase airfare for business travel. The traveler is responsible for making changes to the itinerary for any personal days as University personnel should not be making personal, i.e. non-business, travel arrangements on behalf of a traveler. (R05.02.060 5.a.3.). Additional charges for these changes are the responsibility of the traveler. If the change in itinerary resulted in lower airfare, the traveler must notify the Business Office Travel Coordinator so the credit can be claimed (R05.02.060 5.c.1.).

**Hotel Expenses:** The traveler must reserve their own hotel rooms and pay for all costs. If an employee, hotel expenses will be reimbursed in the TER/ER process (non-employees can choose this method or a PO can be used). Hotel costs include room rental and applicable state and local
hotel taxes. All other expenses charged to the room are the responsibility of the traveler unless there is a documented business reason for the charges.

**Car Rental:**

The rental of up to a “midsize/intermediate” class vehicle is allowable. If a larger vehicle is rented (excluding free upgrades), a business reason must be stated. Optional insurance and extras are not reimbursable. UAF has an arrangement with Enterprise to receive insurance coverage without additional fees. We suggest you take advantage of this whenever possible.

Enterprise discount code XZ45UAF pin UAF

**While Traveling**

Change in Itinerary: Changes to itinerary while in travel status should only be done if there is a business reason or airlines have cancelled your flight. The traveler is responsible for all additional charges at the time of the change. Changes to the originally purchased itinerary must be documented with boarding passes and submitted with the TER along with receipts of additional charges and justification for the change.

**Travel Status:**

A traveler shall be considered in travel status from the time the traveler leaves or returns to his or her immediate work station if travel begins or ends during assigned work hours, or from the time the traveler leaves or returns home if travel begins or ends outside assigned working hours. (R05.02.060 7.a.)

What to Include: The following items should be included on or submitted with the TER:

- The business purpose or reason for travel must be clearly explained (R05.02.060 2. h.). CRCD travelers must include the type of travel.
- Begin date and time and end date and time that traveler was in travel status.
- If you purchased your own airfare or changed the airfare purchased by the Business Office for additional personal days, you must submit itineraries, boarding passes, and any flight change documentation. A scanned copy is fine. Original receipts are not required.
- If the Business Office purchased your airfare, you must submit any flight change documentation. Boarding passes and itineraries of originally purchased flight is not required. A scanned copy is fine. Original receipts are not required.
- Receipts for hotel, car rental, gas, ground transportation, parking, etc. are required. A scanned copy is fine. Original receipts are not required.
- Individual expenses less than $25 may be reimbursed without a receipt. Total expenses without a receipt will not exceed $25 per expense report (R05.02.060 14.b.2.).
- Mileage worksheet with actual documented miles and/or calculated miles using Google maps or other map program.
- Per diem or actual cost of meals (see Per Diem section).

**Reimbursement Method:** Travelers should utilize direct deposit as the means to receive reimbursement. You may sign up or change your direct deposit information in UAOnline (https://uaonline.alaska.edu/) in the Direct Deposit Services section under the Finance tab.

**Per Diem, Meal and Incidental Expenses (M&IE)**

Per diem is a daily allowance (set amount) given to a traveler per day to cover meal and incidental expenses in connection with work done away from home. The maximum daily amount allowed is dictated by university and federal regulations dependent upon location. The projected per diem for the entire trip should be included in the TA. Actual per diem claimed must be specified on the TER. It is permissible and encouraged to claim less than allowable costs for per diem.

**Restrictions:**

- Per diem (M&IE allowance) will not be paid for travel that is less than 12 hours (R05.02.060 6.b.5.).
- If meals are available at no cost to the traveler (other than airline meals and snacks), such as meals provided at conferences, meetings, hotels or if meal costs are reimbursed from other sources or reimbursed as representational expenses, the per diem allowance shall be adjusted by reducing the daily M&IE allowance by one-fourth (1/4) for each meal provided or reimbursed by other means. Exceptions to these reductions must be justified in writing and submitted with the TER (R05.02.060 7.d.).

**Calculation:** The traveler shall be allowed one-half of the basic meal and incidental expense (M&IE) allowance for each half-day period during which the traveler was on travel status. Travelers are encouraged to only claim M&IE of a half at which the traveler was on travel status for a minimum of 2 hours. The half-day periods are as follow:

Midnight-Noon Noon-Midnight (R05.02.060 6.b.4.).
Allowable Limits:
M&IE limits are dependent upon the location of where the traveler is spending the night (where you lay your head). Travelers are always permitted to claim less than the allowable per diem limit. Always use locations maximum per diem rate when submitting grant proposals.

Locations in Alaska:
The Alaska meals and incidentals rate shall be $60.00 for Anchorage, Fairbanks, Juneau and their surrounding communities. (Surrounding urban areas are based on an industry standard of a 50 mile radius, give or take a few miles). For areas outside Anchorage, Fairbanks and Juneau, reimbursement of actual costs for meals and incidentals are encouraged. Actual costs totaling up to the maximum allowable per diem rate for that location may be claimed. If actuals cost are claimed receipts, must be provided with TER. (R05.02.0606.a.4.)

Locations outside Alaska:
Per diem reimbursement rates for travel outside of Alaska shall be the rate authorized for payment by the federal government in the locality (included international travel) in which the travelers spends the night. If the location is not listed on the federal list, the traveler must use the rate for “other” as the amount for per diem claims (R05.02.0606.b.2.).

Travel and Expense Management (TEM) System
Starting May 2013, the university implemented an electronic TA and TER system called TEM. CRCD travelers were asked to be a part of the pilot program. All travelers will be required to use TEM July 1, 2014 to comply with UA travel regulations.

Traveler Profile Set-up: The following instructions must be followed when setting up a traveler’s profile in TEM:

- The approver for all travelers should be the campus travel coordinator.
- Delegates assigned should include your campus travel coordinator and Amanda Lash, Lead Travel Coordinator - CRCD.
- If you are an approver because you are a supervisor or you are the person responsible for the expending of funds, you must enter your Workflow ID.
**Authorization Report:** The Authorization Report in TEM is the electronic version of the paper Travel Authorization (TA).

Your campus travel coordinator will initiate an authorization report in TEM for you using the information you provided on your travel request form. You will then receive an email asking you to review and approve the authorization – this is done by logging into TEM and reviewing the dates and estimated expenses. If you agree with the report, you would choose submit which will serve as your electronic signature/acceptance of the travel authorization.

**Expense Report:** The Expense Report in TEM is the electronic version of the paper Travel Expense Report (TER).

After travel has commenced, turn in all receipts within 15 days of completion of a trip to your campus travel coordinator. They will create your expense report and you will be prompted by email to log in and submit the report which will serve as your electronic signature/acceptance of the expense report.

**Resources:**

[http://www.uaf.edu/finserv/travel/](http://www.uaf.edu/finserv/travel/)

Please contact your campus travel coordinator or CRCD for any further clarification of policies and procedures.
Travel Arrangement Form

Please turn in this form at least 2 weeks before travel occurs

Traveler’s FULL Name: __________________________________________________

UA ID: ___________________ Date of Birth: ___________________

AK Airline Mileage # ______________ Seating Preference: _______________

Purpose of Trip: _______________________________________________________

Date/Time of meetings: __________________TO________________

Dates of travel: __________________TO __________________

Personal Dates: __________________TO __________________

Destination: FROM __________________TO __________________

Preferred departure/arrival flights/#’s: ________________________________
(Attach itinerary)
Where would you prefer to stay: _______________________________________

Will you need a car: _________________________________________________

Any other expenses: _________________________________________________

Any other pertinent information: _______________________________________

Date Requested: _______________ Funding: __________________________

Updated 3/25/14 A. Lash
DURING TRAVEL

• Check with your travel coordinator regarding the maximum lodging allowance for your destination
• UAF travel regulations allow the rental of up to a mid-size (intermediate) car unless business justification is provided/authorized for a larger class
• Save all receipts for lodging, car rental or other ground transportation/taxi, airport parking, gas receipts
• Per diem covers your meals, so there is no need to save meal/food receipts unless you want to claim actual expenses up to the per diem allotment
• Save any other receipts related to business (i.e. teaching supplies, registration fees, tolls, airline change fee if needed for UAF business, etc.)
• Any changes for any reason of airline ticket, please email alash2@alaska.edu noting changes needed and the business justification for change.

POST TRAVEL

**All receipts must be turned in within 10 business days following travel completion**

Please return to CRCD office all original receipts of the following:

1. Airfare receipts
2. Transportation receipts – showing paid
3. Hotel receipt showing a zero balance paid by your credit card – an express checkout receipt is not acceptable
4. Any other receipts applicable to travel
5. Itinerary and/or agenda for meetings attended
6. Please notate any meals provided or provide business justification for not participating in provided meal(s)

Please mail, email or intercampus to:

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CRCD – UAF  
PO Box 756500  
Fairbanks, AK 99775-6500

Email: alash2@alaska.edu  
Ph: 907-474-6417 or 474-7143