



# COLLEGE OF RURAL AND COMMUNITY DEVELOPMENT

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University of Alaska Fairbanks

## 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) and receipts for travel expense reports (TER) within the established timeline. Please contact the travel coordinator at your campus if you have any questions concerning these procedures.

### **Travel Arrangement Form**

A travel request form should be filled out and submitted to your travel coordinator two weeks prior to travel including all trip details. This form should be signed by the appropriate approving official (employee's supervisor, principal investigator and budget approved by the grant program manager and fiscal officer).

### **Travel Authorizations (TA)**

**Purpose:** Travel Authorizations (TA) are used to estimate travel costs, receive approval for travel for authorized persons, and determine the funding source for expenses. TAs are an estimate only. Actual expenses will be described on the Travel Expense Report (TER).

**NOTE: Unauthorized travel may result in the traveler being personally liable for travel expenses.**

**When to Complete:** The TA must be completed if travel includes any of the following: airfare, lodging, transportation rental costs, or meals and incidental per diem (R05.02.060 2.h.).

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

- The business purpose or reason for travel must be clearly explained (R05.02.060 2.h.). CRCD travelers must include the type (conference, meeting, etc.) 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 business travel, the traveler will be personally responsible for making a change to the business itinerary purchased, and incurring the cost of change fees and fare difference, if any. A copy of any change to an itinerary must be submitted to the business office.
- 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 TA 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 and approved in advance (R05.02.060 3.c.2.).
- Per diem or projected cost of meals (see Per Diem section)
- Funding source 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/program manager if you are unsure of the funding source.

**Deadlines:** The following deadlines apply to submission of the TA. 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 may lead to an increase in airfare and/or other travel expenses.

- 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 two weeks prior to scheduled departure.

Authorizing signatures: The following approvals are required prior to submitting or encumbering a TA (R05.02.060 3.a.2.):

- Traveler's supervisor
- Approval by person responsible for expending the funds such as the Principal Investigator or grant PI.
- Budget approval by fiscal officer and grant program manager if applicable

### **Purchasing Travel**

Traveler expenditures may not be made until the TA has been approved and encumbered. Please keep all receipts as these will be required to complete the Travel Expense Report (TER) in order to receive reimbursement. As a general rule, travelers should use their individual corporate travel card to pay for meals, transportation and incidentals. (R05.02.060 10.d.)

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.). A copy of the changed itinerary is required to complete the expense report.

Hotel Expenses: Your travel coordinator will reserve and pay for all lodging within the state of Alaska using a department procurement card to eliminate bed taxes. If a traveler chooses to make their own arrangements for lodging, bed taxes cannot be reimbursed for in state travel without justification. This bed tax exemption is only for in-state (Alaska) travel. 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.

### **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 per IRS regulation. (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 or by others at meetings, 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. (R05.02.060 6.b.2.)

Car Rental: The rental of up to a “midsize/intermediate” class vehicle is allowable when it is the most economical mode of transportation or with a business justification. If a larger vehicle is rented (excluding free upgrades), a business reason must be stated. UAF has an arrangement with Enterprise and National to receive insurance coverage without additional fees. Additional discounts are available through other vendors and that information can be found at the following link: <http://www.uaf.edu/files/procurement/Car-Rental-Pricing-Agreements.pdf>

We suggest you take advantage of this whenever possible.

Enterprise/National 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 Accident Insurance: is generally provided for University of Alaska employees while in authorized university business travel status outside a 100-mile radius from home or regular place of business. (R05.02.060 5.f.)

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.)

### **Travel Expense Reports (TER)**

Purpose: The Travel Expense Report (TER) is the official document used by the traveler and the department to approve actual travel costs and travel dates associated with an authorized trip (R05.02.060 2.i.). Travel expenses shall be reimbursed ONLY upon completion of a TER after the travel is complete. Partial reimbursements will only be processed for blanket TA’s.

Deadlines: TER should be filed with the campus business or travel office within 15 days of completion of a trip. (R05.02.060 14.a.3.) Reminder: No payment will be made for reimbursements requested more than 90 days after the due date of the expense report, unless approved by the Travel Administrator (UAF). (R05.02.060 14.d.2.)

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 calculated miles using Google maps or other map program (see Mileage Worksheet).
- 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 on UAOnline (<https://uaonline.alaska.edu/>) in the Direct Deposit Services section under the Finance tab.

**NOTE:** Supplies and Misc. expenses are no longer processed through travel and should not be included on the TA. Field camp supplies/food and program supplies should be purchased with a ProCard. In the event items are purchased as an emergency need, reimbursement is processed through procurement as a direct pay.

### **Other Travel Issues**

Group Travel: All group travel will be reported at actual cost; however, cash meal and incidental expense allowances may be paid to members of the group for some or all meals or periods (R05.02.060 6.g.). Travel Advances: University-issued cash advances are strongly discouraged and are a means of last resort (4/24/13 Travel Regulation Changes memo from Myron Dosch, Controller).