Department of Chemical & Materials Engineering
College of Engineering
University of Kentucky

TRAVEL

Responsibilities

⦿ Travel only when it is in the best interest of the University.
⦿ Obtain PRIOR APPROVAL from your research advisor.
⦿ Read and understand the University's travel policies.
⦿ Travel by the most economical means feasible.
⦿ Have a Motor Vehicle Record (MVR) Release on file before driving a motor vehicle (personal, rental or motor pool).
⦿ Retain ORIGINAL receipts.

Travel Authorization

College of Engineering Travel Request & Approval Form

Date of Request:

Traveler Full Name:

Name of Traveler's Supervisor:

Faculty_____ Staff_____ RA/TA_____ Student_____

Travel Destination:

Purpose of Travel (specify business purpose of the trip, i.e., give conference name, workshop name, meeting name, agenda, etc.):

Dates of Travel: Departing:_____ Returning:_____

Account number for charges:

Estimated cost of travel:

Will a university procard be used for this travel? Yes____ No____

Is any personal travel included with this trip? Yes____ No____
(i.e., traveling early and/or staying later than would be necessary for business purposes)

If yes, provide dates of personal travel:

If personal travel is included: The ProCard may not be used for airfare and a valid cost comparison from Concur must be obtained for what the airfare would cost if traveler were flying only on official UK business. The cost comparison must be completed and printed on the same day the airline ticket is purchased.

If you will be missing any classes, please indicate if there is a contact person (faculty or graduate student) who will be covering your class duties during your absence, or if other arrangements have been made.

If using any departmental resources (as opposed to grant or contract funds) for this travel, please document the justification and any prior correspondence with the Chair. Also include estimates of expenses (travel costs, lodging, subsistence, registration costs, etc.). *Unless you specifically request departmental resources and get approval in advance, you must have grant or other funds that will cover your expenses.*

Traveler Signature:_____ Date:_____

Approval Signature:_____ Date:_____

UK Travel Reimbursement policy can be found at: http://www.uky.edu/EVPFA/Controller/files/BPM/E-5-1.pdf

- Find the Travel Request form on the CME internal forms page.
  http://www.engr.uky.edu/cme/internal-forms/
- Complete the authorization portion.
- Submit the *signed* form BEFORE making any travel-related purchases and before departing on your trip.

University Travel Policies

The University's travel policies and procedures are described in detail on the website:
http://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/bpm/E-5-1.pdf

It is important that you familiarize yourself with this information **PRIOR TO TRAVEL**; however, if you have any questions, please feel free to see **Chelsea** for clarification.

Travel Services Regulations, Forms and Resources :
http://www.uky.edu/ufs/travel-services-travel-reimbursement

Transportation

- Commercial Airline
- University-owned vehicle
- Personal vehicle
- Public Transportation
- Rental Car
- Privately-owned or charter aircraft

Vehicles

- Travelers must have a Motor Vehicle Record (MVR) Release and Information Form on file with Risk Management in order to operate a
  - University-owned vehicle,
  - Rental vehicle, or
  - Personal vehicle.
- The current mileage reimbursement rate (as of January 2017) is $0.535 per mile.
- If you are traveling more than 400 miles each way, an "Air vs. Auto" Comparison worksheet must be completed.
- Refer to the University's travel policies for detailed guidelines on reimbursement when using personal vehicles.

Flights

- The preferred method of arranging official University business air travel is through UK Travel.
  - Concur
  - AAA
  - Avant Travel

http://www.uky.edu/ufs/travel-services-travel-arrangements

Alternate Travel Vendors

Although the University prefers that all business travel arrangements be made through UK Travel, travelers have the option of using an alternate vendor **ONLY** if the guidelines listed below are followed.

- A nonrefundable coach airfare is obtained and ***valid cost comparison is included***.
- The ticket is purchased using personal funds.
- The original ticket receipt is submitted for reimbursement on a travel voucher after the trip is completed.
- Travel agent fees are limited to the service fees established by UK Travel.
- **Failure to submit a valid cost comparison may result in a substantially reduced reimbursement.**

Fly America Act

a federal regulation that requires the use of U.S. carriers for travel that will be reimbursed by federal grants and contracts

U. S. carriers must be used even if foreign air carriers are cheaper or more convenient.

Details regarding this regulation are included in the University's travel policies and procedures.

Lodging

- The University prefers that hotel reservations be made through UK Travel except when conference hotel rates are required to be booked through alternate means.
- Ask for a government or educational institution rate.
- Reimbursement may not exceed the cost of a single-room rate (no suites).
- *Employees sharing lodging will be reimbursed a pro rata share of the room charge. Notify the hotel at check-in that each employee will require a receipt with the individual's name on it.*
- Must be 40+ miles from home / workstation.

Subsistence (meals)

- **Receipts are not required**.
- Meals are only paid when the trip is 40+ miles from home / workstation and requires an overnight stay.
- Time frames:

Meal	Begin time	End time
Breakfast	6:30 a.m.	9 a.m.
Lunch	11 a.m.	2 p.m.
Dinner	5 p.m.	9 p.m.

- Per diem rates for the continental U.S. can be found at www.gsa.gov/perdiem

Registration Fees

- Generally these should be paid in advance of the trip by Procard.
- Meals included in registration fees cannot be included in claims for subsistence reimbursement.
- For conferences, workshops and other events for which a fee is charged, you'll be required to ***attach a page from the brochure or website or an agenda showing dates of the event and a detailed listing of items included with the registration fee*** such as meals, banquets and other activities.

Miscellaneous Expenses

- Parking & Tolls
- Baggage
- Tips & gratuities:

Service	Amount
Baggage handling	$1-$2 per bag
Housekeeping	$1-$3 per night
Shuttle drivers	$1-$2 per person
Taxi drivers	15%

- Internet (MUST attached written justification for internet expense)
- Other reasonable business expenses with proper documentation.

Non-reimbursable

- Items without receipt
- First-class or business class airfare
- Baggage costs for personal items such as golf clubs/skis
- Flight, trip or rental car insurance
- Travel costs between home and workstation
- Mileage for sightseeing or other personal travel
- Traffic citations, parking tickets and other fines
- Personal entertainment (pay-per-view movies, golf, etc.)
- Charges for late checkout
- Lodging within 40 miles
- Meals included in registration fee
- Laundry when the trip is less than seven days
- Any other expense considered by the University to be excessive or personal in nature

Combining Personal with Business Travel

- In all cases that personal and business travel are combined on an airline ticket, ***a valid airfare cost comparison must be secured*** for what the airfare would cost if the traveler were only flying on official UK business.
- When combining personal with business travel, ***all travel expenses must be paid using personal funds***, not with a University Procard or any other method using University funds; exceptions are:
  - Conference registration fees;
  - Lodging expenses for the nights related to the business portion of the trip.

Third party reimbursements

- Employees must not request reimbursement from the University for expenses reimbursed by any other entity such as a government, corporation, or organization.

- **Any reimbursement from a third-party must be reported on the travel voucher.** This includes any money you receive from the conference organizers, etc. If you receive a travel award from anyone or if a group waives or pays for any portion of your trip, <u>you must disclose this on your TRIP reimbursement</u>.

Upon your return

- Process your TRIP reimbursement. You'll want to do this right away because it must be through all the approvals within 60 days or you will be taxed on the reimbursement.
- Open myUK and click on the "Employee Self Service" tab.
- Click "Travel Requests and Travel Expenses.
- Click "Create Travel Document"
- Choose the appropriate template (overnight trip, day trip or travel amendment) and click "start."

Training Manual :
http://www.uky.edu/ufs/travel-services-travel-reimbursement

TRIP tips

◉ Select the destination city:
  - Use the drop down key to see the listing of destination countries and select one.
  - Click on the "Region" search key and then click "show search criteria." If you traveled inside the US, type the state abbreviation followed by an asterisk (*) in the region field.
  - Enter the city name surrounded by asterisks. Example: *Lexington*.
  - Click "start search."

  (see pages 19-23 over the overnight trip manual for more details and screen shots)

TRIP tips

◉ Changing the funding from the default to your actual account number:
  - Click "Change Cost Assignment"
  - Delete any numbers displayed in the "cost center" and "fund" fields.
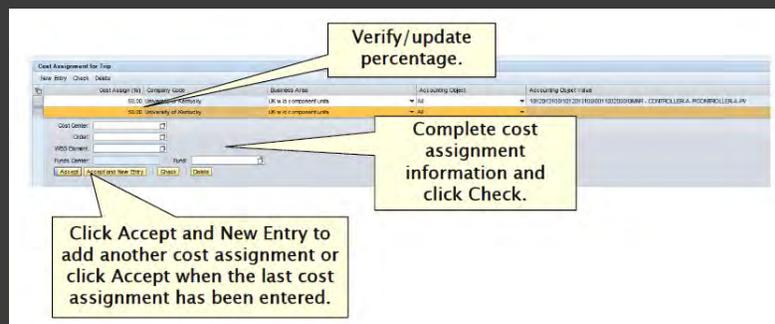
TRIP tips

- If your trip is funded by a grant (a 10-digit number beginning with a "3") enter your grant number in the field called "WBS."
- If your trip is funded by a start up, operating account, professorship, gift account, etc. (a 10-digit number beginning with a "1") enter your cost center number in the field called "cost center."
- If you have an SIO number (usually begins with 809…) put that in the "order" field.

TRIP tips

- Reporting "3rd Party Payments" accurately:
  - On the section called "Trip Attributes" you must check the box labeled "Trip Includes Amounts Paid by 3rd Party" (page 41 of the tutorial)

New Overnight Trip – Trip Attributes

TRIP tips

- When entering your receipts you would choose "expense paid by" and select "paid by 3rd party" and allocate the amount of your award toward one or more of your personally paid expenses.
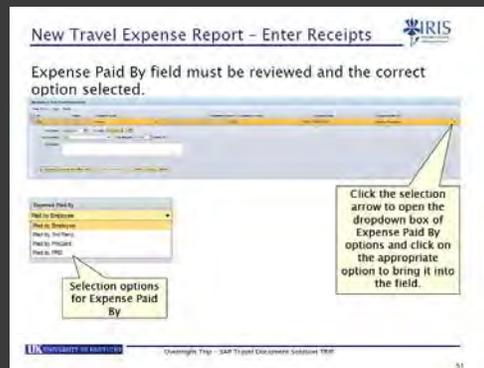
Example: Your registration fee was waived by the conference organizer, but it would have been $250 if you'd had to pay. Choose "registration" from the expense type drop down, enter $250 as the expense amount and select "paid by 3rd party" in the expense paid by drop down.

TRIP tips

- Don't forget to **attach your receipts as ONE PDF**. The file should be renamed to the Trip # - Description of the documentation included.
  - Example: TRIP1107-Receipts.pdf
  - **Don't use any spaces or special characters or your attachment might not be usable by the approvers or accounting**.

TRIP tips

⦿ When you're ready to submit, **change the radio button** from "Save and Close" **to "Save and Send for Approval"**

Summary

⦿ Get prior approval.
⦿ Know the rules **_before_** you travel.
⦿ Be fiscally responsible on your trip.
⦿ Save itemized receipts and submit them promptly upon return.

Check the status of your reimbursement

- Open myUK and click on the Enterprise Services tab.
- Select "Workflow" and then "Travel Document Workflow Tracking."
- Enter the Trip Number you want to check and push the "execute" icon.
- When the results populate, use the bottom scroll bar to move to the right to see the "result" and "workflow status."