



SOUTHERN UTAH UNIVERSITY
Policies and Procedures

Policy # 10.13
Date Approved: 02/28/91
Date Amended: 03/25/20
Reviewed w/ No Changes:
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SUBJECT: UNIVERSITY TRAVEL

I. PURPOSE:

To ensure the safety of individuals participating in University-authorized travel, Southern Utah University (University) establishes travel authorization, conduct and safety, insurance, and expense verification/reimbursement requirements. The requirements established within apply to all individuals who participate, in any capacity, in University-authorized travel.

The University operates an Internal Revenue Service (IRS) Accountable Plan for reimbursing University business related travel expenses. When IRS criteria are met, amounts reimbursed are considered non-taxable to the employee.

This policy determines when an actual expense reimbursement is allowed or whether a per diem or mileage allowance may be used. The University reserves the right to set per diem or mileage allowances at or below the applicable current Federal rates. Travel expenses are to be reimbursed uniformly throughout the University.

The University is accountable for how public monies are spent and expects that travel expenses will be scrutinized, no matter how the travel is funded. Those who travel on behalf of the University hold a position of trust and authority, requiring the demonstration of integrity by judicious use of such funds.

It is the responsibility of department administrators to determine when travel is authorized. It is the responsibility of the traveler to certify via electronic approval that all expenses are correct and incurred in performance of University related business. Wherever possible, the University will establish controls within the reimbursement process to ensure that departments meet their fiduciary responsibilities

When University funds are not available to reimburse all Allowable Expenses, an individual is not obligated to travel. However, if the individual chooses to travel, it is expected that the traveler will assume the remainder of the cost.

If travel is not authorized and executed under the requirements of University policy, individuals who thereafter determine to travel without the University's authorization do so at their own risk, assuming all responsibility for costs incurred, harm, complications, detention, and/or death, thereby absolving and releasing the University from all risk, liability, and responsibility for, or associated with, the unauthorized travel.

II. REFERENCES



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- A. Fly America Act
- B. Internal Revenue Service Publication 463
- C. Southern Utah University Policy 5.27 *Non-Discrimination/Anti-Harassment*
- D. Southern Utah University Policy 5.30 *University Authorized International Travel*
- E. Southern Utah University Policy 5.37 *Motor Pool*
- F. Southern Utah University Policy 5.60 *Sexual Misconduct*
- G. Southern Utah University Policy 6.28 *Faculty Professional Responsibility*
- H. Southern Utah University Policy 8.3.5 *Termination of Non-academic Staff Employees and Disciplinary Sanctions*
- I. Southern Utah University Policy 11.2 *Student Conduct Code*
- J. Utah Board of Regents Policy R212 *Chief Executive Office Travel Oversight*
- K. Utah Controlled Substances Act

III. DEFINITIONS

- A. **Accompanying Adult:** An individual 18 years of age or older who is not a current University employee or student but has been approved through this policy to accompany an individual who is traveling as part of a University program. This term does not apply to adults who are formally registered to participate in extracurricular (noncredit) travel programs.
- B. **Allowable Expense:** A necessary, reasonable, and appropriate expense that is incurred by an approved traveler in accordance with University policy and is therefore eligible for reimbursement.
- C. **Extended Day Travel:** Travel on bona fide University business that does not require an overnight stay but does require the traveler to be away from the normal place of employment for at least 10 hours and a distance of at least 100 miles (one way).
- D. **Learning Abroad Advisory Board:** A group comprised of appointed representatives from Academic Affairs and Student Affairs. This board reviews requests and makes recommendations for international travel programs.
- E. **Local Travel:** Travel within a 100-mile radius of the normal place of employment. This may include a one-time trip or ongoing trips covering a certain time period.



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- F. Per Diem: The maximum daily allowance for meals and incidental expenses.
- G. Personal Guest: An individual (who is not an Accompanying Adult) traveling with an employee/student who is on University-authorized travel not involving travel programs, or students, and whose travel itinerary, arrangements, and expenses for which the University shall not be responsible.
- H. Program Director: A University employee designated to supervise a student group participating in a University-authorized domestic or international travel program. (Includes athletic coaches, designated advisors, official chaperones, etc.)
- I. Proper Receipt: A receipt, invoice, registration form, or other qualifying documentation provided by the vendor or lodging establishment where an eligible, business-related expense was incurred. For expense verification purposes, Proper Receipts must contain the name and address of the business, date and time of purchase, itemization of charges, amount paid, and method of payment. Proper Receipts for lodging establishments must also include the rate charged, names of guest(s) or cardholder who paid for the room(s), and date(s) of occupancy. A bank statement is not an acceptable Proper Receipt.
- J. Travel Reimbursement: Repayment by the University to an authorized traveler for eligible out-of-pocket expenses incurred while traveling on bona fide University business.
- K. Traveler: An individual authorized through this policy to travel on bona fide University business (including educational and intercultural travel programs and travel to international conferences, but excluding internships in which the University is not the employer), the expenses of which are paid, in full or in part, by University funding, including grants, contracts, cooperative agreements, etc.
- L. University Travel: Travel on University business that requires the traveler to be away from home or normal place of employment for a period of time that includes an overnight stay or that requires the use of air transportation. Commuting between an employee's home and regular place of employment is not official University Travel.
 - 1. Domestic Travel - Travel within and between any of the states, territories, and possessions of the United States of America.



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2. International Travel - travel outside of the United States, its territories and possessions, or as specifically defined by contracting or granting agencies.

IV. CONDUCT AND SAFETY

A. Conduct

1. Travelers must comply with all applicable University policies and codes of conduct, travel program stipulations, and with the local, state, federal, and international laws of the areas to which they travel. The University shall neither intercede on behalf of travelers who violate any law nor attempt to protect violators from the legal consequences of their actions.
2. Travelers who violate University policy shall be subject to immediate disciplinary action, including but not limited to warnings, restricted or limited participation in travel activities, revocation of approved travel status, and/or mandatory return to campus. Travelers who must return before their originally scheduled departure as a result of disciplinary action may be required to reimburse the University in full for the costs and fees associated with their return.
3. Travelers who violate University policy may also be subject to additional disciplinary sanctions up to and including termination/expulsion, as outlined in *Policy 11.2 Student Conduct Code*, *Policy 8.3.5 Termination of Non-Academic Staff Employees and Disciplinary Sanctions*, *Policy 6.28 Faculty Professional Responsibility* and/or other applicable University policies.
4. Any activity, event, excursion, etc. organized by a University program shall be considered an extension of the University classroom, and shall therefore be governed by the same policies and codes of conduct.
5. Designated Program Directors supervising travel groups shall be responsible for the enforcement of University policies, codes of conduct, and travel program requirements.
6. Travelers shall neither possess nor use any narcotics, illegal drugs, or controlled substance, except as permitted by the Utah Controlled Substances Act.



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7. University faculty and/or staff shall not share sleeping quarters with students when traveling for official University business or activities, except under limited circumstances and with prior written approval for an exception. A written request for such an exception shall be submitted by the University faculty and/or staff member to his or her supervising dean or director for approval at the time the proposed travel is requested. If the exception is approved for a University group traveling internationally, the Program Director must clearly communicate the lodging details to potential participants in writing before participants book travel and pay program fees. If the exception is approved for domestic University program trips and other types of travel, potential travelers must be notified in writing by the applicable University unit before they book their travel.
8. Students traveling as part of a study abroad group or University-sponsored student group shall not be permitted to have Personal Guests accompany them (unless both are registered students and both have applied and been accepted into the same travel program).
9. As approved by each program, students participating in University sponsored trips are permitted to have an Accompanying Adult travel with them as long as the student and Accompanying Adult sign all required waivers and other forms, participate in required training, and pay for all travel-related costs associated with the Accompanying Adult's travel. For international destinations, Accompanying Adult travel must be approved by the Learning Abroad Advisory Board.
10. Students who are planning to participate in an academic, credit-bearing travel program must be enrolled and registered with the University during the academic semester in which the program occurs. If travel occurs outside of a registered semester, students must be enrolled in an adjacent or bordering semester.

B. Mandatory Reporting

1. As mandated by federal law and in accordance with *University Policy 5.60 Sexual Misconduct*, University employees who are traveling with students are required to promptly report Clery-reportable crimes (as outlined in Policy 5.60) to the Chief of SUU Police and the Title IX Coordinator. In addition, University employees who are traveling with students shall promptly report instances of sexual harassment, discrimination, and/or



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misconduct that they become aware of to the Title IX Coordinator, in accordance with *Policy 5.27 Non-Discrimination/Anti-Harassment*.

2. A vehicle accident while on University business must be reported immediately to local law enforcement agencies, car rental companies (if applicable), University Motor Pool (if applicable), and to University Risk Management.

V. INSURANCE

A. Liability Insurance

1. University general liability insurance covers employees, approved volunteers, and approved interns for liabilities that may be incurred directly from the scope of their employment or assigned activities, including activities undertaken while traveling domestically on University business.
2. University general liability insurance does not cover employees traveling internationally.
3. Personal guests are not covered by the University general liability insurance.

B. Property Insurance

1. Damage to or loss of SUU owned property is covered by the University's property insurance (subject to deductible).
2. Damage to or loss of personal property is not covered by the University's property insurance

C. Workers Compensation Insurance

1. Only employees, approved volunteers, and approved interns, while acting within the scope of their employment or assigned activities, are covered by the University's workers' compensation insurance, including activities undertaken while traveling on University business.

D. Auto Insurance



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1. University fleet vehicles are covered by the University's auto insurance policy.
 2. Personal vehicles are not covered by the University's auto insurance policy. The driver assumes all responsibility and liability.
 3. Rental vehicles used for domestic travel are covered for liability and collision insurance if reservations are made with a state contracted car rental agency. Car rentals which are not on state contract are not covered through University insurance and are subject to a \$10,000 deductible payable by the traveler. For non-domestic travel, additional insurance should be purchased and is eligible for reimbursement.
 4. Insurance coverage for charter transportation contract must be reviewed and approved by SUU Risk Management.
- E. Additional insurance requirements for international travelers are outlined in Policy 5.30 *University Authorized International Travel*.
- F. Insurance coverage for Accompanying Adults shall be specified by an approved contract or agreement.

VI. AUTHORIZATION

- A. Documented authorization of travel is required prior to departure and before expenses are incurred for all business trips, including:
1. Defined University Travel
 2. Extended Day Travel
 3. Local Travel
- B. Travelers shall submit travel authorizations and obtain required approvals in accordance with Travel Office guidelines. For group travel, Program Directors are responsible for submitting travel requests on behalf of their travel group. Travel authorization requirements for the University President are stipulated by Utah Regents Policy R212.
- C. Travelers using a Motor Pool vehicle while driving on University business must be authorized to do so through Motor Pool and must abide by driving policies and procedures included in *Policy 5.37 Motor Pool*.



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- D. Departments should work with appropriate groups on campus to identify required information and waivers for travelers based on the nature of the trip. Required information and waivers shall be gathered by sponsoring departments and may include, but are not limited to, medical waivers, emergency contact information, and waivers of liability.
- E. Non-employee travel shall be pre-approved by a dean, department head, or vice president. Travel expenses for individuals who are not employees of the University but who are providing services to the University, such as consultants, speakers, lecturers, and visiting professors and students (scholars) are reimbursed as independent contractors.
- F. Additional international travel requirements are outlined in *Policy 5.30 University Authorized International Travel*.

VII. ADVANCES

- A. Certain eligible travelers may request a travel advance in accordance with University guidelines.
- B. Travel advances are considered personal loans. Funds advanced to the traveler must be accounted for within 30 days of returning from travel. Travel advance payments exceeding actual bona fide travel expenses shall be returned to the University in the amount of the overpayment.
- C. As required by IRS regulations, travel advances not accounted for within thirty (30) days of the return date shall be deducted in full from the traveler's payroll check accordance with Utah law.

VIII. VERIFICATION

- A. All travel expenses paid, or to be paid, with University funds shall be subject to verification and approval through the appropriate forms and documentation. Travelers are responsible for ensuring that such travel expenses are permitted under this policy, are for bona fide University business, and are fully documented in accordance with University policies and guidelines.
- B. When travel expenses are to be paid in part by non-University sources, only eligible expenses not paid from other sources shall be paid/reimbursed by the University, subject to the provisions of this policy. Travel expenses incurred on



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sponsored funds or grants must also follow the sponsor's/grant's rules and guidelines.

- C. Individuals who authorize travel or verify travel expenses on behalf of the University are responsible for ensuring that proposed travel is justified for the operation of the University and its mission and for verifying that all travel expenses comply with University policy and are a prudent use of University funds, adequately documented, and submitted and accounted for within the required timeframes established by University policies and guidelines.
- D. Tickets or any portion thereof that go unused, have future value, and were paid for by the University remain property of the University. The traveler should make every effort to apply any credit, coupon, or voucher to another University business trip.

IX. EXPENSES

A. Transportation

- 1. Travelers are expected to choose the most prudent method of transportation for their situation. Travelers may use private or rental vehicles in lieu of air transportation with pre-approval from the appropriate supervisor. Rental vehicles may be used for Extended Day Travel only when such method of travel is more advantageous to the University and with the approval of the traveler's appropriate supervisor.
- 2. Mileage shall be calculated from the traveler's normal place of employment unless it is more essential and prudent to calculate mileage from the traveler's personal residence. Mileage is calculated by state road map, chart, or odometer reading. Travelers must specify their destination and any other stops made for mileage credit/ otherwise, only the destination and return mileage shall be honored. Mileage rates are all-inclusive; additional itemized expenses related to such travel, such as vehicle maintenance costs, traffic/parking violation fines, etc. shall not be paid for/reimbursed with University funds.
- 3. Eligible travelers may rent University vehicles through the University's Fleet Operations in accordance with University requirements and procedures and *Policy 5.37 University Motor Pool*. Chartered



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transportation can be coordinated by contacting the Purchasing department.

4. Travel funded, in part or in full, through federal grants or contracts must comply with the Fly America Act by using a US air carrier even when a non-US carrier would be more cost effective or convenient. Exceptions to this rule may be allowed under certain circumstances as permitted by law and must be well documented and approved in advance. Travelers may direct questions pertaining to this stipulation to the Office of Sponsored Programs, the principal investigator, or the project director of the specific federal grant or contract.

B. Lodging

1. For expense verification or reimbursement, lodging expenses must be documented on travel expense reports and supported with a Proper Receipt. The maximum reimbursement per person is the single occupancy rate.
2. Travelers may use and be reimbursed for non-conventional lodging (e.g., personal recreation vehicles, lodging with friends/relatives, overnight camping, etc.) in accordance with University guidelines.

C. Per Diem Allowances

1. Meal and incidental expenses incurred during approved travel are reimbursable. Travelers may choose to use the current per-diem rate or be reimbursed for the actual cost (not to exceed the current per-diem rate).
2. The per-diem allowance is all-inclusive. Additional expenses associated with a meal, such as sales tax, tips, etc. are considered part of the allowance. Current per diem rates will be specified and adjusted according to University guidelines.
3. Service tips and other expenses not included on a receipt are considered incidental expenses and are included in the current per diem allowance. These amounts will not be reimbursed individually.



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4. Extended Day Travel, departure and arrival days qualify for 75% of the daily per diem rate regardless of the departure or arrival times. Local travel does not qualify for a per diem allowance.
5. Miscellaneous expenses, such as baggage fees, parking fees, and transportation costs (including public transportation fares, taxi/limousine services), shall be reimbursed for actual out-of-pocket costs. Such expenses shall include a Proper Receipt or be well documented in accordance with University requirements and guidelines.
6. When there is no overnight stay, meals may be reimbursed only if they are taken with non-employees and are for a business purpose. The traveler shall provide the names of the non-employees and explain the purpose on the travel expense report.
7. Travelers may be reimbursed for long-term economy parking or away-from-the-airport parking. The maximum reimbursement for parking, whether travelers park at the airport or away from the airport, is the economy-lot parking rate for the departure airport.
8. A University procurement card (Pcard) is the preferred method of payment for expenses where circumstances allow it. For instance, conference registration, airfare, rental vehicles, lodging, etc.

D. Unsubstantiated/Unallowable Expenses

1. Travel expenses not directly related to and required for official University business, or that are incurred for the personal use of convenience of the traveler, shall not be reimbursed. Examples of such expenses include but are not limited to
 - a) Personal entertainment expenses such as pay TV, movie or game rentals, health club fees, sightseeing tours, hospitality events, etc.;
 - b) Damages or losses of personal property;
 - c) Expenses incurred by an Accompanying Adult or Personal Guest during travel;



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- d) Program loyalty credits used to pay for airline travel, lodging reservations, upgrades or discounts, and/or other travel expenses;
- e) Expenses for travel associated with typical employment duties, such as commuting between home and place of employment;
- f) The purchase of alcohol, tobacco, or other recreational substances unless otherwise approved by the University Presidents or another authorized individual.

X. Reimbursement

- A. A completed travel expense report along with all receipts must be submitted to the Travel Office within 30 days of return from travel. Reports that are not submitted within 30 days will not be honored by the University.
- B. Travel expense reports must include a Proper Receipt for each individual out-of-pocket expense of 30 US dollars (USD) or more. Expenses less than 30 USD without a receipt shall be itemized and explained.
- C. If the approved travel was for a seminar, conference, convention, or similar function, a copy of the agenda/schedule of events must also be included.
- D. A Proper Receipt shall be included for expense verification for lodging accommodations, including campgrounds and trailer parks if applicable.
- E. Travel expense receipts that include guest charges should be itemized to reflect only the charges of the authorized traveler on travel expense reports. All guest-incurred expenses shall be deducted from the reimbursement request. Lodging receipts should indicate a single rate. If a traveler hosts an eligible business meal with others while in travel status, the University shall reimburse this particular meal based on the receipt. A list of those attending and the business purpose of the meal should be attached to the receipt.
- F. The amount(s) of travel advances granted to the traveler shall be deducted from the final reimbursement amount.
- G. When paying for expenses in foreign currencies, travelers are reimbursed in US dollars at the actual exchange rate for the travel period. A foreign-currency



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exchange receipt or a credit card billing statement can support the exchange rate.