



Division of Student Success

Travel Policies and Procedures



Why do we have a travel policy/procedure?

- To be compliant with State and Federal guidelines
- To keep others informed of current information that is happening within the higher education industry
- To ensure information on our employee accomplishments is shared with appropriate executive leadership
- For record keeping and compliance with HLC standards

What Travel is acceptable

All ordinary and necessary expenses incurred while traveling on prior authorized travel on behalf of the University:

- Attendance at professional meetings, conferences, presentations
- Field Trips
- Promotion of financial assistance
- Field work in support of development of off-campus programs
- Personnel Recruitment
- Student Recruitment
- Attendance at meetings of state or regional higher education/industry organizations
- Local mileage incurred as a result of university business
- Tips on meals should not be excessive

General Rules for Travel

- Most economical means
 - Rental car – when total expense is less than other means of transportation
 - Air – lowest fair available, but traveler should not be unreasonably inconvenienced. Unnecessary optional amenity fees will not be paid.
 - Personal Vehicle – up to current IRS standard rate, \$0.575. Miles must be detailed with start/finish location as the university or point of departure whichever is less.
- Other travel costs
 - Shuttles, taxis, local mass transit
 - Meals, ***only when travel is overnight*** and cannot exceed standard meal allowance (per diem) with itemized receipt
 - Lodging – make sure to use tax exemption and submit itemized receipt
 - Conference fees

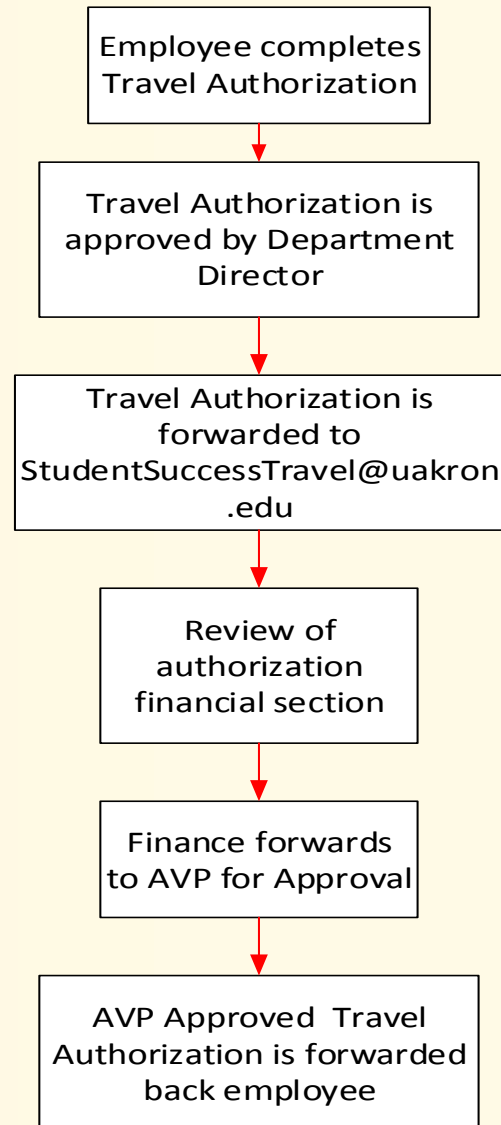
Paying for Travel

- Use of Visa Card
 - Must be used to pay for **all travel**
 - Ensure use of subcodes on PaymentNet
 - Make sure to note if using someone else's Pcard on your travel expense report
- Use of Fuel Card
 - Can only be used with rental vehicle or a university vehicle
- Travel Reimbursement
 - Items that may not have been paid by visa: taxis, baggage, meal, miscellaneous, tolls
 - Must be completed within three weeks of return from travel

Travel Authorization

- Must be completed **PRIOR** to *any travel plans being made*
- Must be approved by supervisor
- Must be approved by the department Director
- Submitted to StudentSuccessTravel@uakron.edu
- Should receive approved authorization back within three business days of submission to the Student Success Travel office
- Any questions on specific travel outlined on request will be *directed to the employee who made the request*

Flow of Student Success Travel Authorization



Division of Student Success Travel Policies

- Strong focus on professional development and involvement for all employees
- Prioritization of travel requests:
 - Employee has a need for specific training, cannot be obtained at University.
 - Employee holds a leadership position within the professional organization.
 - Employee is presenting at the conference.
 - Employee is a participant in the conference planning committee/staff.
 - Grant funded request.
- *Meeting the above criteria does not guarantee travel will be approved or funds will be available.* Approval to accept a role that requires travel should be obtained before accepting a role in an organization or at a conference.

Division of Student Success Travel Policies, cont.

- *Professional Development will only be funded for 1 regional or national conference per employee per fiscal year with available resources and Director approval.*
 - *Exception: may be if have own professional development funds from teaching.*
 - *Exception: if accompanying students on a trip.*
- *Only amount that was authorized will be paid*



Example of Completed Travel Authorization

The University of Akron
Division of Student Success
Travel Authorization Addendum

Name: Conference Attendee
Dept: Department Success
ID: 00000

THE UNIVERSITY OF AKRON REQUEST/CERTIFICATION OF LEAVE

For all full-and part-time employees: faculty, contract professionals, and biweekly (exempt) staff (OAC 3359-11-01). Submit this form for any absence from campus: i.e., illnesses, medical appointments, professional meetings, educational classes, or other absences during regularly scheduled work times. To utilize the Family and Medical Leave Act, or if you require periods of extended leave, contact Benefits Administration at x7092.

PURPOSE OF LEAVE WITH PAY

- VACATION
- SICK LEAVE (check one: personal immediate family)
- PROFESSIONAL* (provide telephone contact in COMMENTS)
- OTHER (provide reason for requested leave in COMMENTS)

*When requesting "Professional" leave, you must complete the Travel Authorization Form below.

COMMENTS: Cell phone: 330-450-6066

(Please provide the name and contact information for the person designated to act on your behalf while you are out)

DATE(s)	TIME	TOTAL HOURS
7/15/15 - 7/19/15	8-5	24

I certify that the dates and purpose of the leave are accurate as reported. I understand that falsification may result in disciplinary action, up to and including termination.

EMPLOYEE SIGNATURE: _____ DATE: _____

REQUEST FOR LEAVE: APPROVED DISAPPROVED TRAVEL AUTHORIZATION APPROVED DISAPPROVED

SUPERVISORS SIGNATURE: _____ DATE: _____
DISTRIBUTION: signed original to the Associate Vice President/Fiscal Office for month-end reporting.

TRAVEL AUTHORIZATION

Complete this portion **PRIOR** to incurring any travel expenses for overnight or out-of-state professional trips. Submit actual expenses for reimbursement on the UA Travel Expense Report after the completion of travel.

Date prepared: 4/9/15

For (person): Conference Attendee

Attending: NCCI

Where: Nashville, TN

When: 7/15/15-7/19/15

Reimbursement type: Full estimated amt. \$2,350

Partial estimated amt. \$ _____

ACCOUNT CODE(S)

2	0	0	0	0	0	100%
						%

EXPENSE ESTIMATES

PROBABLE MODE OF	Transportation*	\$265.00
TRANSPORTATION	Lodging	\$888.00
<input checked="" type="checkbox"/> air, train, bus	Meals	\$172.00
<input type="checkbox"/> private/pool vehicle	Registration	\$900.00
Name of personal auto insurance carrier: _____		
<input type="checkbox"/> rental car	Parking	\$50.00
	Other	\$75.00
	Total	\$2,350.00

Approved by: _____
Director/Associate Vice President Date

DISTRIBUTION: Original to the Associate Vice President/Fiscal Office for records; copies to Director and person traveling.

Event/Conference/Workshop Name: NCCI 2015 Annual Conference

Requestor Name (please print): Conference Attendee

- Requestor holds a leadership position in the professional organization.
- Requestor is presenting at the conference/Seminar/Workshop
- Requestor has need for specific training or information that cannot be obtained at the University.
- Requestor is a participant in the conference planning committee/staff.
- This is an activity/event related to a grant.

Briefly explain the reason for your attendance at the Conference/Seminar/Workshop:

Presenting for a workshop at the conference on travel efficiencies for higher education. Will be attending the pre-conference training to obtain additional training in the area of workplace continuous improvement. Presentation will highlight the efficiencies that have been gained at the University of Akron within the travel area. It will highlight the savings that have been realized through the centralization of the travel vendors and various contracts that were able to be realized with the various vendors.

Briefly explain any unusual costs associated with this travel:

No unusual costs are associated with this travel.

Completion of Travel Expense Report

- Include all costs of trip
 - Include all visa charges
 - Include all prepaid charges
- Include a copy of the approved travel authorization
- Ensure completion of travel expense report is within 3 weeks of travel
- Have approved by your supervisor
- Submit to the university travel office in purchasing, travelexpensereport@uakron.edu
 - Copy Student Success Travel office on the submission, studentsuccesstravel@uakron.edu
- If all expenses were covered by university visa or prepay, *Best Practices* indicates you still need to complete travel expense report with all receipt attachments for your files

Helpful links for university travel

- To find university travel agency
 - Roy's Stow Travel <http://roysstowtravel.com/>
 - Chima Travel <http://www.chimatravel.net/>
- Rental car contracts
 - <http://www.uakron.edu/purchasing/facultystaff/current-contracts.dot>
- Division of Student Success Travel Authorization
 - <http://www.uakron.edu/student-success/staff>
- University Controller Office – Per diem rates, mileage rates, board policies surrounding travel
 - <http://www.uakron.edu/controller/travel.dot>
- University Travel Rules
 - <http://www.uakron.edu/dotAsset/2194239.pdf>
 - <http://www.uakron.edu/dotAsset/2194243.pdf>

Questions?

If you have specific questions regarding travel call or email Susan Beke, x7088/sbeke1@uakron.edu