



UNIVERSITY OF
SOUTH ALABAMA

Contents

- Introduction..... 1
- General Travel Information 2
 - Approvals Required Prior to Travel 2
 - Faculty Professional Leave or Travel Authorization..... 2
 - College of Medicine Travel Authorization 2
 - Hospital Travel Authorization 2
 - Travel Outside the United States (Excluding travel to Alaska and Hawaii)..... 3
 - Student Travel Authorization Form 3
 - Other 3
 - Documentation..... 3
 - Reimbursement 3
 - Federal Grants and Contracts 4
 - Length of Stay 4
 - Extended Travel to Save Costs 4
 - Timely Filing..... 4
 - Registration Fees 4
 - Social/Recreational Activities 4
 - Team and Other Student Group Travel 5
 - Travel Advances..... 5
 - Travel of Students, Consultants, and Prospective Employees..... 5
 - Airline/Hotel Incentive Programs 5
 - Travel of Spouses..... 5
 - Travelers Claiming Reimbursement for Expenses of Other Employees 5
 - Travel of University Employees for Outside Organizations 5
 - Base Area and Employee Work Base 5
 - Combined Out-Of-State and In-State Travel 6
 - Internal Revenue Service Form W-9 and Direct Deposit Form 6
- Transportation..... 6
 - Personal Automobile..... 6
 - University Automobiles..... 7
 - Taxi and Limousine Service 7

Rental Automobiles.....	7
Airline Reservations	8
Concur	9
Procurement Card and Travel	9
Out-of-State Travel.....	10
Lodging.....	10
Meals	10
Other Allowable Expenses	11
Non-Allowable Expenses (Not All-	10.y0 (r)-8.....

Athletic Team Per Diem Cards 17

Introduction

The University of South Alabama has a fiduciary responsibility to insure University resources are used responsibly and that individuals do not incur inappropriate or excessive expenses, or gain financially from traveling on University business. These Travel and Entertainment Regulations have been developed in accordance with laws of the State of Alabama and the Internal Revenue Service. The regulations apply to University employees, students and any other individuals traveling on approved, official University business.

These regulations are issued and maintained by the University Business Office for the following purposes:

- To communicate the University's policies and procedures for travel and entertainment expenditures to travelers and approvers of travel expense reports.
- To describe the types of expenditures that are reimbursed by the University, and inform employees of their responsibility to control and report travel expenditures.
- To provide guidance to employees on University policies and procedures for entertainment expenditures.

The University will reimburse employees who travel on authorized University business for in-state travel expenses in accordance with the Alabama in-state travel law (Act #36- 7-20). The University will reimburse employees who travel on authorized University business for actual and necessary expenses for out-of-state travel in accordance with the provisions of the Alabama out-of-state travel law (Act #36-7-21).

It is expected that employees will use prudent judgment when incurring University expenses for travel purposes. Anyone traveling on University business is expected to exercise the same economy that a practical person would exercise when traveling on personal business. Excessive costs or unjustifiable costs are not acceptable and will not be reimbursed. The individual requesting reimbursement from the University is responsible for insuring that his or her expense and related reimbursement request

General Travel Information

Approvals Required Prior to Travel

All University travel must be approved in advance. Approval requirements vary among University divisions.

Faculty Professional Leave or Travel Authorization

An Authorization for Professional Leave or Travel (Travel Request) must be submitted in Concur to the appropriate Department Chair and Dean (or to the Senior Vice President for Academic Affairs or Vice President for Health Affairs for individuals reporting directly to that position) prior to making any travel arrangements. Permission to be absent from campus or other approved work site for one-half day or more to engage in professional activity during regular periods of contracted employment can be granted under professional leave.

College of Medicine Travel Authorization

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Travel Outside the United States (Excluding travel to Alaska and Hawaii)

As more fully discussed in the "International/Foreign Travel" section of these regulations, prior to making travel arrangement, all University-related international/foreign travel must be approved by the appropriate department head, dean/administrator, Vice-President/Senior Vice President and President.

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Federal Grants and Contracts

These travel regulations apply to all funds of the University including federal grants and contracts, and are in addition to federal regulations and/or limitations imposed by granting agencies. Travel expense reports that include costs charged to grants or contracts must include the signature of the principal investigator.

Length of Stay

In order to adequately document the length of stay, a copy of the agenda of the meeting or conference being attended should be attached to the travel expense report. Employees should limit their length of stay to the minimum amount of time necessary. Lodging and meal expenses for extra days of travel caused by use of a personal automobile will not normally be reimbursed.

Extended Travel to Save Costs

The additional expenses associated with travel that is extended to save costs, such as a Saturday night stay, may be reimbursed when the cost of airfare would be less than the cost of airfare if the traveler had not extended the trip, and provided that those expenses were incurred in compliance with all other travel regulations. Such as all (lat)-3 ndhded6(e)-3 (c)

Team and Other Student Group Travel

For travel involving student athletic teams, the coach or instructor will be responsible for submitting a travel expense report and other appropriate documentation covering applicable expenses. For travel involving other student groups, the faculty or staff sponsor will be responsible for submitting a travel expense report and other appropriate

insurance coverage, at no cost, when tickets are requisitioned. The University does not reimburse for any additional insurance expense. If any other means are used to purchase tickets, reimbursement cannot be made until after the trip. Procedures for purchasing through Travel Leaders are outlined as follows:

- The traveler or departmental secretary should contact Travel Leaders directly to obtain flight information and tentative reservations. Where travel is extended beyond the period required for business purposes please refer to the section on *Extended Travel to Save Costs* for documentation and calculations necessary to support the extension.
- At the time the airline reservation is invoiced, the traveler or department secretary must submit the invoice for payment via Concur Invoice. A business purpose or reason for travel must be indicated and a copy of the airline itinerary must be included.

Procedures for obtaining prepaid airline tickets purchased through Travel Leaders (formerly Springdale Travel) for Health Systems travel should be requisitioned through each Hospital Administration Office. Procedures for purchasing through Travel Leaders are outlined as follows:

Other Allowable Expenses

The Internal Revenue Service requires that receipts be provided for all expenditures that cost \$75.00 or more. This requirement is in addition to the receipts required below.

	Receipt Required?
Meals	No
Registration Fees	Yes
Repairs to University vehicles	Yes
Gasoline for University vehicles	Yes
Rental automobile	Yes
Parking	Yes
Telephone calls (University business only)	Yes
Tips (for items other than meals)	No
Checked baggage fees	Yes
Tolls	No
Taxi fares and limousine service under \$25	No
Taxi fares and limousine service over \$25	Yes

(Note: Taxi fares to and from meals are not allowable)

Non-

Travel Reimbursement

Requests for reimbursement of authorized out-of-state travel expenses should be submitted in Concur and be approved by the department head and appropriate dean or administrator. The specific purpose of the trip should be indicated and all applicable receipts should be attached. The dates and hours of departure and return, length of stay documentation, points of travel, mode of transportation, mileage (if by private automobile), cost of meals and lodging, and other allowable expenses should be entered on the travel expense report.

Other

See the General Travel Information section for additional information concerning out-of-state travel.

In-State Travel

Per Diem/Lodging and Meal Allowance

- For in-state travel that requires only **one** overnight stay the per diem allowance will be \$85.00 per day.
- For in-state travel that requires **two or more** overnight stays the per diem allowance will be \$100 per day.
- In-state travel where the travel time is **6 to 12 hours outside of the base area** the meal allowance will be \$12.75.
- In-state travel where the travel time is **in excess of 12 hours outside of the base area** but **not overnight** the meal allowance will be \$34.00.
- See exception to per diem.
- No travel allowance shall be paid for a trip of less than 6 hours.

Federal and State tax regulations consider reimbursement for meal allowances paid to University employees for in-state travel not requiring an overnight stay to be taxable income.

The University will report the meal allowance on IRS Form W-2 Wage and Tax Statement as earnings, and appropriate taxes will be deducted from the traveler's paycheck.

Overnight Per-Diem Examples

One overnight stay-An individual travels to Montgomery on Monday and returns on Tuesday, that individual is due \$170.00 (\$85/day, Mon & Tues). The individual only stayed on night, Monday night.

Two or more overnight stays-An individual travels to Montgomery on Monday and returns on Wednesday, that individual is due \$300 (\$100/day, Mon, Tues, & Wed). The individual stayed two Th

Puerto Rico, etc. should be processed as domestic travel. Refer to:
<https://www.doi.gov/oia/islands> for a complete listing of US territories and insular areas.

Approval Procedures for International/Foreign Travel

NO travel plans, reservations or expenditures should be made PRIOR to performing and completing the following procedures for all international/foreign travel:

- Travelers must complete the International Travel Review Form (ITRF). (which includes the Annual Temporary Export Certification-ATEC). This form is completed online and located at <https://www.southalabama.edu/departments/eforms/travel/>.
- The completed ITRF/ATEC should be submitted online to the Office of International Education. Once approved, you will receive an electronic approval from the Office of International Education.
- Travelers should complete all departmental, college or administrative travel approval forms and/or Concur request and insure that they are appropriately approved.

Information regarding this process can be found in the General T7 b-3 (n)2.2 (e)-3 (r)11.1 (0.002 (s)-1.3 (:

Procedures for Local Mileage Reimbursement

Using the official University travel reimbursement form

In order to obtain reimbursement for local travel, documentation should include:

- Date(s) of trip
 - Time of trip
 - Total mileage driven
 - Actual addresses
 - If applicable, any intermediate address that would have an effect on mileage claimed
 - The
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Team Procurement Cards

In order to facilitate intercollegiate athletic team travel while providing for the maximum institutional control over funds, the Procurement Card (PCard) can be used by intercollegiate athletic teams when they travel to away athletic events. Such cards are available for coaches and staff as deemed necessary by the Athletic Business Office (ABO).

Athletic Team Per Diem Cards

Prospective Student-Athlete (PSA) Recruiting. The Prospective Student-Athlete recruiting process relies on the PSA and his/her family feeling comfortable with an institution that it is a safe, family oriented environment. It is industry standard for a Coach's family to participate in the activities of a PSA's Official Visit to campus – which may involve campus tours, community tours, entertainment, or meals throughout the visit. Therefore:

- Meals for Employees dining with Prospective Student-