

Texas A&M University-San Antonio

21.99.99.00.01 Travel Procedures

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Procedure Statement

This Procedure establishes specific processes Texas A&M University-San Antonio (A&M-San Antonio) will follow regarding travel entitlements.

Reason for Procedure

A state employee may receive reimbursement of travel expenses required by the employing agency to conduct official state business. The reimbursement amount is subject to limitations prescribed in Chapter 660 of the Texas Government Code, the General Appropriations Act, and rules adopted by the Comptroller. This Procedure informs faculty and staff of travel requirements and establishes specific processes faculty and staff must follow to receive reimbursement.

Official Procedure

This Procedure is applicable to both the paper-based travel expense approval and payment/reimbursement process and the electronic processes embedded in Concur. When a specific or generic form name is mentioned (for example, "Reimbursement Request"), it refers to the applicable paper forms and/or Concur functions.

When an expense is noted as not reimbursable, if such an expense was paid using a University travel card, the traveler will be required to repay the University the amount of the expense.

1. GENERAL

This section provides general guidance relating to travel requests and travel expense reimbursements. Specific guidance relating to the type of travel (i.e., local, in-state, out-of-state, or international) and type of expense is presented in later sections of this Procedure. Guiding principles for this Procedure include:

- Guidance in this Procedure is intended to comply with accountable plan rules established by the IRS. An accountable plan ensures that travel expense reimbursements are not taxable to travelers.
- Guidance in this Procedure is intended to enhance the University's risk management function by requiring travelers to provide pre-travel information for certain types of travel.
- Divisions and departments may choose to implement more restrictive travel requirements. Travelers in those divisions or departments must still comply with the other travel requirements set out in this Procedure.
- Whenever a traveler can realize savings through alternative booking providers, any associated fees are reimbursable as long as the total cost (including the fees) is less than the cost that would have been incurred using standard booking procedures. However, any Texas sales tax charged to the traveler is not reimbursable; if a University travel card is used, the traveler must reimburse any Texas sales tax to the University.
- This Procedure does not cover every possible situation. For example, grants and contracts often have different or additional requirements. Where there is a conflict between the requirements of this Procedure and grant/contract requirements, travelers must follow the most restrictive requirement.

As a rule, in order to be reimbursed under this Procedure, a travel expense must be (a) an ordinary and necessary business-related travel expense, and (b) reasonable in amount.

CAUTION

State funds **may not** be used to pay travel expenses or to reimburse employees for travel expenses.

The Vice President for Business Affairs or designees are authorized to approve exceptions to the requirements in this procedure when an exception is deemed to be in the best interest of the University.

- 1.1. The Texas Comptroller of Public Accounts has created the online *textravel* guide to help state agencies and institutions of higher education comply with State travel laws and rules enacted by the legislature.

All University faculty and staff should be familiar with the guide because they must comply with it before their travel expenses may be paid or reimbursed.

- 1.2. Pre-travel authorization is required for all out-of-state and international travel, as well as all in-state travel requiring hotel accommodations, air transportation and/or rental cars. Pre-travel authorization for all travel is strongly encouraged.
- 1.3. Travelers are encouraged to utilize a University travel card, rather than personal funds, whenever possible, including for meals. When the travel card is used, a receipt is automatically uploaded into Concur, eliminating the need for the traveler to keep track of paper receipts.
 - 1.3.1. In this Procedure, references to submission of receipts applies only to the use of personal funds, and the related request for reimbursement.
- 1.4. Reimbursement Requests must be submitted within 90 days of the last day of travel. Requests received after 90 days have elapsed **will not** be processed.
 - 1.4.1. Reimbursement Requests for travel taking place after June 10 of each year must be submitted and approved **no later than September 7**. This is necessary to allow year-end closing to occur on a timely basis. Requests submitted after that date will be charged to the new fiscal year's budget for the account.
- 1.5. Whenever the traveler pays for travel expenses with personal funds, reimbursement will not be made until travel is complete, and an approved Reimbursement Request is submitted.
- 1.6. Reimbursement of meals and lodging will be based on actual meals and lodging costs, not to exceed the maximum allowance rates published by the General Services Administration. Supporting documentation for actual meal costs is not required. See the GSA website at <http://www.gsa.gov/portal/category/21287> for allowance rates by location.

CAUTION

This does not mean the traveler is automatically entitled to receive the GSA per diem rate. Rather, the per diem rate serves as a cap for actual meal and lodging expenses that will be reimbursed.

On travel days, the meal reimbursement is limited to 75% of the GSA per diem rate.

- 1.7. Taxi (including airport shuttles, Uber, Lyft, etc.), parking, and toll expenses are reimbursable. Receipts are required for reimbursement if the expense is \$25 or more. Taxi tips, if not included in the base fare, are limited to 15% of the fare.

- 1.8. Approved registration fees for conferences, workshops, or seminar fees are payable directly by the University or reimbursable to the traveler. An agenda must be submitted with the Travel Request before a registration fee will be paid directly by the University. An agenda and proof of payment are required for reimbursement of registration fees paid by the traveler. If an available travel/conference agenda was not submitted with the Travel Request, it must be submitted with the Reimbursement Request.
- 1.9. All requests for reimbursement of travel expenses must be reviewed and approved by an authorized approver within the traveler's division for accuracy and completeness prior to submission.
- 1.10. Mileage for travel using personal vehicles should be determined using MapQuest, Google Maps, or another commonly used mapping service. If the mapping service does not have the specific travel origin or destination address, the closest point to the origin or destination must be used to calculate mileage reimbursements.

Supporting documentation for actual mileage is not required or accepted. However, the origin and destination addresses for each leg of travel should be included on the Reimbursement Request.

EXAMPLE

If the traveler drives from campus to a destination in Austin, then to a destination in Killeen, then returns home, the Reimbursement Request should show origin and destination information for three legs:

1. Campus to Austin;
2. Austin to Killeen; and
3. Killeen to home

- 1.11. With the exception of meal receipts, original receipts (or if the traveler is using Concur, scanned receipts) must be attached to the Reimbursement Request, including receipts for any travel expenses prepaid by the University.

Travelers should make or print a copy of their completed Reimbursement Request, including receipts, for their records. Travel expense reimbursements will be made within ten (10) business days of the date Accounting Services receives a properly completed and approved Reimbursement Request and required supporting documentation.

2. A&M-SAN ANTONIO RESPONSIBILITIES

- 2.1. Division and department heads must ensure their employees are properly trained on travel procedures, and keep them informed of any changes in travel procedures.

3. EMPLOYEE RESPONSIBILITIES

- 3.1. Employees must ensure that their travel complies with applicable laws, policies, regulations, rules, and procedures and must not seek reimbursement for travel expenses that were not incurred by the employee or have been paid or provided for by other means.
- 3.2. The State Comptroller is required by law to properly audit all claims submitted for payment. Therefore, all payment transactions are subject to audit regardless of amount or materiality. Each employee is responsible for requesting clarification regarding any travel expense for which the employee seeks reimbursement when they are not certain they are entitled to such reimbursement.

4. TRAVEL PROCEDURES – LOCAL

Local travel is any travel that takes place completely within the area inside a 30-mile radius outside of the city limits of San Antonio. Local travel generally does not involve overnight stays outside the traveler's home.

4.1. Pre-Travel Authorization

- 4.1.1. Pre-travel authorization is required if total travel expenses, including conference registration fees, are expected to exceed \$500. Such authorization is also required if expenses will be incurred for local commercial air transportation and/or hotel lodging (see below for additional guidance).
- 4.1.2. Pre-travel authorization is not required for other local travel. However, for risk management purposes, pre-travel authorization is strongly encouraged.

4.2. Commercial Ground Transportation

- 4.2.1. In general, travelers are expected to utilize privately owned vehicles (or University-owned vehicles, if available) for local ground transportation.
- 4.2.2. When commercial ground transportation is considered appropriate, taxi (including airport shuttles, Uber, Lyft, etc.) fares are reimbursable. Receipts are required for reimbursement if the expense, including any tips, is \$25 or more.

CAUTION

Taxi tips are only reimbursable if the tip is not included in the base fare, and is limited to 15% of the base fare.

4.3. Commercial Air Transportation

- 4.3.1. Commercial air transportation is not allowed for local travel.
- 4.3.2. In the extremely rare cases where commercial air transportation is necessary for local travel, the expense must be pre-approved by the President or a designee, and a pre-travel authorization must be submitted.

4.4. **Lodging**

- 4.4.1. Hotel lodging is normally not allowed for local travel.
- 4.4.2. There may be limited exceptions for situations such as attendance at a conference hosted locally. Any such exceptions must be pre-approved by the traveler's division head.

4.5. **Meals**

- 4.5.1. Meal expenses associated with local travel are not reimbursable.
- 4.5.2. In some circumstances, a meal purchased while in local travel status may be reimbursable as a business meal expense. For purposes of this section, a business meal is a meal that meets *all* of the following requirements:
 - The traveler purchases a meal for him/herself *and* at least one other diner; *and*
 - At least one of the other diners is not a University employee; *and*
 - A substantive business-related discussion takes place during the meal.

Meals meeting these conditions are reimbursable as a business meal expense if documentation requirements (the "5Ws") are met.

- 4.5.3. If the traveler is in a travel status other than local travel, and purchases a meal for other University employees, the expense is reimbursable as a business expense, not a travel expense, if documentation requirements (the "5Ws") are met.

If the traveler is in local travel status, this type of business meal expense is not reimbursable.

4.6. **Privately Owned or -Leased Vehicles**

- 4.6.1. In general, travelers are expected to utilize privately owned or -leased vehicles (collectively referred to below as "personal vehicles"). University-owned vehicles, if available, may also be used for local ground transportation.
- 4.6.2. University insurance does not cover privately owned or -leased vehicles. In order to use a privately owned or leased vehicle on University business, the traveler must carry auto liability insurance levels of at least the minimum required by Texas law plus personal injury protection benefits. The traveler is responsible for all insurance coverage relating to the use of a privately owned or -leased vehicle.
- 4.6.3. When a University-owned vehicle is used, reimbursement based on mileage is *not allowed*. Only actual gas expenses are reimbursable. Receipts for gas purchases must be submitted with the Reimbursement Request.

- 4.6.4. Mileage is reimbursable at the current IRS mileage reimbursement rate. If the mileage reimbursement rate allowed by current State and/or A&M System regulations is less than the IRS rate, such lower rate must be used.

Mileage between the traveler's home and normal or scheduled duty station (normally, the main campus), also known as "commuting mileage", is not reimbursable.

- 4.6.4.1. If an employee is *required* to work on a scheduled day off, or outside of their normal working hours, commuting mileage is reimbursable.

- 4.6.4.2. If an employee is *not required* to work during such times, commuting mileage is not reimbursable.

- 4.6.5. Mileage for travel using personal vehicles can be calculated by Concur based on input origin and destination information. If Concur is unable to calculate mileage, it should be determined using MapQuest, Google Maps, or another commonly used mapping service. If the mapping service does not have the specific travel origin or destination address, the closest point to the origin or destination must be used to calculate mileage reimbursements.

- 4.6.6. Supporting documentation, such as a printout from a mapping service, for actual mileage is not required to be submitted with the Reimbursement Request. However, the origin and destination addresses for each leg of travel should be noted in sufficient detail to allow a determination about whether the claimed mileage is reasonable.

- 4.6.7. Travelers are expected to utilize the "shortest time" or "shortest distance" route option generated by the mapping service. If neither of these routes is viable for some reason, the reason for using a different route must be noted on the Reimbursement Request.

- 4.6.8. Because reimbursement for the use of a personal vehicle is based on reimbursable mileage, the use of University-provided travel cards, fuel cards, fleet cards, etc., for gas purchases is not allowed.

- 4.6.9. When a traveler uses a personal vehicle during local travel, the maximum reimbursable mileage is equal to (a) total mileage driven from the time the traveler leaves home to the time the traveler returns home, minus (b) the traveler's commuting mileage.

EXAMPLE 4.6.9 (A)

Joe Driver's normal round-trip commuting mileage is 20 miles. During the day, he drives from his home to a business meeting in San Antonio. He drives back to campus for the remainder of the day, and then drives back home. His total mileage for the day is 33 miles.

Joe's reimbursable mileage is 13 miles. Reimbursable mileage is calculated as 33 (total miles) - 20 (commuting mileage).

EXAMPLE 4.6.9 (B)

Jane Driver's normal round-trip commuting mileage is 30 miles. During the day, she drives from her home to a business meeting, then returns home. Her total mileage for the day is 22 miles.

Because Jane's total mileage (22 miles) is less than her commuting mileage (30 miles), **she is not entitled to reimbursement for mileage.**

- 4.6.10. When a traveler drives locally from campus to a destination or destinations off-campus, and returns to campus before going home, the mileage is reimbursable.

EXAMPLE 4.6.10

Jane Driver's normal round-trip commuting mileage is 30 miles. She drives from her home directly to campus. During the day, she drives 12 miles to a business meeting and back to campus. She later drives from campus directly to her home.

Jane's total reimbursable mileage is 12 miles. The mileage for the drives between home and campus, even though they are separated by another trip, is non-reimbursable commuting mileage.

4.7. Rental Vehicles

- 4.7.1. The cost of renting a vehicle for local travel is normally not reimbursable.
- 4.7.2. If circumstances make use of a rental vehicle appropriate, the reason for using a rental vehicle must be included in the Reimbursement Request.
- 4.7.3. Gasoline purchases for a rental vehicle are reimbursable. Receipts are required for reimbursement.

CAUTION

Mileage reimbursement is not allowed for the use of rental vehicles. Only actual gas purchases are allowed.

- 4.7.4. University-provided travel cards may be used to purchase gas for a rental vehicle.

4.8. Incidental Expenses

- 4.8.1. Incidental expenses are any ordinary, necessary, and reasonable local travel-related expenses not specifically addressed above. Examples include, but are not limited to:

- 4.8.1.1. Business phone calls
- 4.8.1.2. Internet access fees
- 4.8.1.3. Repair charges when a University-owned vehicle is used
- 4.8.1.4. Copying and duplication charges
- 4.8.1.5. Notary fees
- 4.8.1.6. Books or documents purchased while attending a seminar or conference
- 4.8.1.7. Fax charges

- 4.8.2. Receipts for all incidental expenses of \$25 or more, in total by type of incidental expense, must be submitted with the Reimbursement Request.

EXAMPLE 4.8.2

Joe Traveler is staying in a hotel that charges \$7 per day for internet access. He stays for four nights. Because the total charged for internet access is \$28, Joe must submit an appropriate receipt in order to be reimbursed.

5. TRAVEL PROCEDURES – IN-STATE WITH OVERNIGHT STAY

In-state travel refers to all travel within the state of Texas that is not considered local travel as defined in Section 4.

5.1. Pre-Travel Authorization

- 5.1.1. Pre-travel authorization is required if total travel expenses, including conference registration fees, are expected to exceed \$500. Such authorization is also required if expenses will be incurred for commercial air transportation (see below for additional guidance).

- 5.1.2. Pre-travel authorization is not required for other in-state travel with an overnight stay. However, for risk management purposes, pre-travel authorization is strongly encouraged.

5.2. Commercial Ground Transportation

- 5.2.1. In general, travelers are expected to utilize privately owned vehicles (or University-owned vehicles, if available) for ground transportation.
- 5.2.2. When commercial ground transportation is considered appropriate, taxi (including airport shuttles, Uber, Lyft, etc.) fares are reimbursable. Receipts are required for reimbursement if the expense, including any tips, is \$25 or more.

CAUTION

Taxi tips are only reimbursable if the tip is not included in the base fare, and is limited to 15% of the base fare.

EXAMPLE 5.2.2A

Joe Traveler has to take a taxi from his hotel to a meeting, and back. The cost each way, including tip, is \$14.00. Joe must submit receipts for each leg, because the total expense of \$28.00 exceeds \$25.

EXAMPLE 5.2.2B

In the example above, Joe takes a taxi from his hotel to a meeting, but rides back to the hotel with a colleague. Joe does not have to submit a receipt for the taxi fare, because the total expense of \$14.00 is less than \$25.

EXAMPLE 5.2.2C

Jane Traveler has to take a taxi from her hotel to a meeting, and back. The cost each way, including tip, is \$9.00. Jane does not have to submit receipts for the taxi fare, because the total expense of \$18.00 is less than \$25.

5.3. Commercial Air Transportation

- 5.3.1. Commercial air transportation is generally not allowed for in-state travel.
- 5.3.2. In cases where commercial air transportation is necessary for in-state travel, a pre-travel authorization must be submitted and approved.

5.3.3. Before arranging for air travel, the traveler must determine the funding source. If the flight is going to be paid for by a federal grant or contract, or charged to a federal project, ensure the booking complies with the Fly America Act.

5.3.3.1. General Requirements of the United States Code Title 49, Subtitle VII, Part A, Subpart I, Chapter 401, Section 40118, commonly referred to as the “Fly America Act”:

5.3.3.1.1. Each department is responsible for compliance with the Fly America Act. If you believe an exception applies, consult with Risk Management and Procurement Services prior to making air travel arrangements.

5.3.3.1.2. Transportation of passengers and property by air must use a U.S. air carrier service for all air travel and cargo transportation for services funded by a federal grant or contract or charged to a federal project (i.e. funded by the U.S. Government). NOTE: a foreign air carrier may be used if the transportation is provided under a bilateral or multilateral air transportation agreement to which the United States Government and the government of a foreign country are parties, and which the Department of Transportation has determined meets the requirements of the Fly America Act. This includes flights within the United States. If there is no U.S. carrier to your destination, you must travel on a U.S. carrier as far as possible. By law, additional cost for U.S. carrier flights is not sufficient justification to fly on foreign carriers. Please note that the same rules apply to a foreign visitor’s flights when supported by federal funds.

5.3.3.2. Open Skies Exceptions to the Fly America Act

5.3.3.2.1. The biggest exception to the Fly America Act is the Open Skies Agreement. The United States and European Union (EU) “Open Skies” Air Transport Agreement was published by the U.S. General Services Administration providing full explanation of the multilateral agreement in place so that qualifying travelers, whose travel is supported by federal funds, may travel on EU airlines as well as U.S. flag air carriers. A list of current member countries of the EU is available at the Europa web site (https://europa.eu/european-union/about-eu/countries/member-countries_en), plus Norway and Iceland. There are also Open Skies agreements with Australia, Switzerland and Japan.

- 5.3.3.2.2. When air travel is supported by federal funds, travel must be on a U.S. flag carrier or, for specific destinations, may be on an EU plus Norway and Iceland, Australian, Japanese, or Swiss airline.

CAUTION

The Open Skies Agreements do not apply if travel is funded by the Department of Defense (DOD) or by a department of the U.S. Military. Travel funded by the DOD or by a U.S. military department must be on a U.S. flag air carrier.

5.3.3.3. Additional Exceptions to the Fly America Act

- 5.3.3.3.1. Other strictly limited circumstances in which an exception may be allowed include:

- A U.S. flag air carrier does not provide service on a particular leg of the trip,
- The use of a U.S. flag air carrier will unreasonably delay travel time,
- The traveler is involuntarily rerouted on a foreign air carrier,
- Medical or safety reasons,
- When the traveler cannot purchase a direct ticket in an authorized class of service on a U.S. flag air carrier, and a seat is available in an authorized class of service on a foreign air carrier, or
- When the costs of transportation are reimbursed in full by a third party, such as a foreign government, international agency or other organization.

- 5.3.3.4. When using a foreign air carrier, a certification of the travel is required. The certification must include

5.3.3.4.1. The traveler's name,

5.3.3.4.2. The traveler's travel dates,

5.3.3.4.3. The origin and the destination of the travel,

5.3.3.4.4. A detailed itinerary of the travel, name of the air carrier, and flight number for each leg of the trip, and

5.3.3.4.5. A statement explaining why the traveler met one of the exceptions, or a copy of A&M-San Antonio's written

approval that foreign air carrier service was deemed a matter of necessity in accordance with the University mission.

CAUTION

If the traveler improperly uses foreign air carrier service, the transportation cost for the foreign air carrier will not be paid or reimbursed by the University.

5.4. Lodging

- 5.4.1. Travelers are expected to make hotel reservations utilizing available University lodging contracts. When no contract is available, travelers should stay at a hotel of reasonable quality and price.
 - 5.4.1.1. If the traveler is attending a conference, staying at an official conference hotel is appropriate.
 - 5.4.1.2. Generally, the maximum amount allowed for daily lodging expense is the actual cost incurred, not to exceed:
 - 5.4.1.2.1. The charge for a single-occupancy room, with either one king-sized bed or two queen-sized beds,
 - 5.4.1.2.2. The maximum lodging allowance rate published by the General Services Administration. See the GSA website at <http://www.gsa.gov/portal/category/21287> for allowance rates by location.
 - 5.4.1.2.3. Exceptions to the above must be approved in advance. If pre-approval is not obtained, payment or reimbursement of the exceptional amounts may not be allowed.
- 5.4.2. Alternative lodging arrangements (e.g., bed and breakfasts, condominiums, etc.) must be pre-approved before the reservation is made. If suitable hotel lodging is available where the overnight stay occurs, the maximum amount allowed for alternative lodging is limited to the amount that would have been incurred had the traveler stayed at the hotel.
 - 5.4.2.1. If the traveler stays in a private residence or other non-commercial lodging establishment, no payment of any kind, to either the traveler or the host, is allowed.
- 5.4.3. Whenever a traveler can realize savings through alternative booking providers, any associated fees are reimbursable as long as the total cost (including the fees)

is less than the cost that would have been incurred using standard booking procedures. However, any Texas sales tax charged to the traveler is not reimbursable; if a University travel card is used, the traveler must reimburse any Texas sales tax to the University.

5.4.4. Texas state sales tax is not reimbursable. Travelers must present a sales tax exemption certificate (available from the divisional travel coordinator or the Procurement Office) to the hotel when checking in. If a University travel card is used, the traveler must reimburse any Texas sales tax to the University.

5.4.5. Hotel receipts must be submitted when the related Reimbursement Request is submitted. Receipts must show:

- The name and address of the lodging establishment,
- The traveler's name,
- The single occupancy room rate,
- A daily itemization of the lodging charges, and
- Proof of payment showing an ending balance of zero.

The amount to be reported as lodging expense is the cost of the room, plus any taxes (other than Texas sales tax) and mandatory fees. Other expenses charged to the room, such as room service or internet access, must be reported in the appropriate category, not as lodging expense.

5.5. Meals

5.5.1. Reimbursement of meals is based on actual meal costs, not to exceed the maximum allowance rates published by the General Services Administration. Supporting documentation for actual meal costs is not required. See the GSA website at <http://www.gsa.gov/portal/category/21287> for allowance rates by location.

CAUTION

This does not mean the traveler is automatically entitled to receive the GSA per diem rate. Rather, the per diem rate serves as a cap for actual meal expenses that will be reimbursed.

On travel days, the meal reimbursement is limited to 75% of the GSA per diem rate.

5.5.1.1. If a meal is provided to the traveler at no cost, or a meal is purchased using a University travel card, reimbursement for that meal is not allowed.

5.5.1.2. Meals provided as part of a conference registration fee are not reimbursable.

EXAMPLE 5.5.1.2

Juan Traveler is attending a conference. Included in the conference fee is lunch each day. Juan chooses to eat at a local restaurant one day rather than at the conference. He is not entitled to reimbursement for lunch on that day.

Conference agendas must be submitted with the Reimbursement Request. These help determine travel days and identify meals included in the conference fee.

5.5.2. In some circumstances, a meal purchased while in local travel status may be reimbursable as a business meal expense. For purposes of this section, a business meal is a meal that meets *all* of the following requirements:

- The traveler purchases a meal for him/herself *and* at least one other diner; *and*
- At least one of the other diners is not a University employee; *and*
- A substantive business-related discussion takes place during the meal.

Meals meeting these conditions are reimbursable as a business meal expense if documentation requirements (the “5Ws”) are met.

5.5.3. If the traveler is in an overnight travel status, and purchases a meal for other University employees, the expense is reimbursable as a business expense, not a travel expense, if documentation requirements (the “5Ws”) are met.

If the traveler is in local travel status, this type of business meal expense is not reimbursable.

5.6. Privately-Owned Vehicles

5.6.1. In some situations, travelers may choose to use a privately owned or –leased vehicle instead of commercial transportation. In these situations, the mileage reimbursement is limited to the travel expense that would have been incurred as if the traveler traveled commercially. Expenses to be considered in the “as-if” expense include, but are not limited to:

- Airfare
- Mileage to/from the airport
- Parking at the airport
- Shuttle service to/from the airport at the travel destination

EXAMPLE 5.6.1

Maria Driver decides to drive to El Paso for a conference (1,100 mile round trip). At 54.5 cents per mile, the calculated mileage reimbursement would be \$600. If the cost of flying to the conference would have been \$450, the mileage reimbursement is limited to \$450.

- 5.6.2. Mileage driven while at the travel destination is not reimbursable.
- 5.6.3. University insurance does not cover privately owned or -leased vehicles. In order to use a privately owned or -leased vehicle on University business, the traveler must carry auto liability insurance levels of at least the minimum required by Texas law plus personal injury protection benefits. The traveler is responsible for all insurance coverage relating to the use of a privately owned or -leased vehicle.
- 5.6.4. When a University-owned vehicle is used, reimbursement based on mileage is *not allowed*. Only actual gas expenses are reimbursable. Receipts for gas purchases must be submitted with the Reimbursement Request.
- 5.6.5. Mileage is reimbursable at the current IRS mileage reimbursement rate. If the mileage reimbursement rate allowed by current State and/or A&M System regulations is less than the IRS rate, such lower rate must be used.
- 5.6.6. Mileage for travel using personal vehicles can be calculated by Concur based on input origin and destination information. If Concur is unable to calculate mileage, it should be determined using MapQuest, Google Maps, or another commonly used mapping service. If the mapping service does not have the specific travel origin or destination address, the closest point to the origin or destination must be used to calculate mileage reimbursements.
- 5.6.7. Travelers are not required to submit supporting documentation, such as a printout from a mapping service, for actual mileage with the Reimbursement Request. However, the origin and destination addresses for each leg of travel should be noted in sufficient detail to allow a determination about whether the claimed mileage is reasonable.
- 5.6.8. Travelers are expected to utilize the “shortest time” or “shortest distance” route option generated by the mapping service. If neither of these routes is viable for some reason, the reason for using a different route must be noted on the Reimbursement Request.
- 5.6.9. For convenience, travelers may elect to use the following standard round-trip mileages from San Antonio to these common in-state destinations:
 - Austin – 158 miles
 - College Station – 340 miles

- Corpus Christi – 286 miles
- Dallas – 546 miles
- Fort Worth – 536 miles
- Houston – 394 miles
- Kingsville – 316 miles
- Stephenville – 414 miles

5.6.10. Because reimbursement for the use of a personal vehicle is based on reimbursable mileage, the use of University-provided travel cards, fuel cards, fleet cards, etc., for gas purchases is not allowed.

5.7. Rental Vehicles

- 5.7.1. The traveler is responsible for ensuring the procurement of the most economical means of transportation. There may be instances where the most economical form of transportation is not feasible due to other considerations.
- 5.7.2. If circumstances make use of a rental vehicle appropriate, the reason for using a rental vehicle must be pre-authorized and/or stated in the traveler's Reimbursement Request.
- 5.7.3. Gasoline purchases for a rental vehicle are reimbursable. Receipts are required for reimbursement.

CAUTION

Mileage reimbursement is not allowed for the use of rental vehicles. Only actual gas purchases are allowed.

- 5.7.4. University-provided travel cards may be used to purchase gas for a rental vehicle.
- 5.7.5. Receipts for rental vehicles must be included in the traveler's Reimbursement Request.

5.8. Incidental Expenses

- 5.8.1. Incidental expenses are any ordinary, necessary, and reasonable overnight travel-related expenses not specifically addressed above. Examples include, but are not limited to:
- 5.8.1.1. Business phone calls
 - 5.8.1.2. Internet access fees
 - 5.8.1.3. Repair charges when a University-owned vehicle is used
 - 5.8.1.4. Copying and duplication charges
 - 5.8.1.5. Notary fees

- 5.8.1.6. Books or documents purchased while attending a seminar or conference
- 5.8.1.7. Fax charges
- 5.8.2. Receipts for all incidental expenses of \$25 or more, in total by type of incidental expense, must be submitted with the Reimbursement Request.

EXAMPLE 4.8.2

Joe Traveler is staying in a hotel that charges \$7 per day for internet access. He stays for four nights. Because the total charged for internet access is \$28, Joe must submit an appropriate receipt in order to be reimbursed.

6. TRAVEL PROCEDURES – IN-STATE WITHOUT OVERNIGHT STAY

In-state travel refers to all travel within the state of Texas that is not considered local travel as defined in Section 4.

6.1. Pre-Travel Authorization

- 6.1.1. Pre-travel authorization is required if total travel expenses, including conference registration fees, are expected to exceed \$500. Such authorization is also required if expenses will be incurred for commercial air transportation (see below for additional guidance).
- 6.1.2. Pre-travel authorization is not required for other in-state travel without an overnight stay. However, for risk management purposes, pre-travel authorization is strongly encouraged.

6.2. Commercial Ground Transportation

- 6.2.1. In general, travelers are expected to utilize privately owned vehicles (or University-owned vehicles, if available) for ground transportation.
- 6.2.2. When commercial ground transportation is considered appropriate, taxi (including airport shuttles, Uber, Lyft, etc.) fares are reimbursable. Receipts are required for reimbursement if the expense, including any tips, is \$25 or more.

CAUTION

Taxi tips are only reimbursable if the tip is not included in the base fare, and is limited to 15% of the base fare.

EXAMPLE 6.2.2A

Joe Traveler has to take a taxi from his hotel to a meeting, and back. The cost each way, including tip, is \$14.00. Joe must submit receipts for each leg, because the total expense of \$28.00 exceeds \$25.

EXAMPLE 6.2.2B

In the example above, Joe takes a taxi from his hotel to a meeting, but rides back to the hotel with a colleague. Joe does not have to submit a receipt for the taxi fare, because the total expense of \$14.00 is less than \$25.

EXAMPLE 6.2.2C

Jane Traveler has to take a taxi from her hotel to a meeting, and back. The cost each way, including tip, is \$9.00. Jane does not have to submit receipts for the taxi fare, because the total expense of \$18.00 is less than \$25.

6.3. Commercial Air Transportation

- 6.3.1. Commercial air transportation is generally not allowed for in-state travel.
- 6.3.2. In cases where commercial air transportation is necessary for in-state travel, a pre-travel authorization must be submitted and approved.
- 6.3.3. Before arranging for air travel, the traveler must determine the funding source. If the flight is going to be paid for by a federal grant or contract, or charged to a federal project, ensure the booking complies with the Fly America Act. See Section 5.3.3 for details relating to this requirement.

6.4. Meals

- 6.4.1. Meal expenses not associated with an overnight stay are not reimbursable.
- 6.4.2. In some circumstances, a meal purchased while in local travel status may be reimbursable as a business meal expense. For purposes of this section, a business meal is a meal that meets *all* of the following requirements:
 - The traveler purchases a meal for him/herself *and* at least one other diner; *and*
 - At least one of the other diners is not a University employee; *and*
 - A substantive business-related discussion takes place during the meal.

Meals meeting these conditions are reimbursable as a business meal expense if documentation requirements (the “5Ws”) are met.

- 6.4.3. If the traveler is traveling in state without an overnight stay, and purchases a meal for other University employees, the expense is *not* reimbursable.

6.5. Privately-Owned Vehicles

- 6.5.1. In some situations, travelers may choose to use a privately owned or –leased vehicle instead of commercial transportation. In these situations, the mileage reimbursement is limited to the travel expense that would have been incurred as if the traveler traveled commercially. Expenses to be considered in the “as-if” expense include, but are not limited to:

- Airfare
- Mileage to/from the airport
- Parking at the airport
- Shuttle service to/from the airport at the travel destination

EXAMPLE 6.5.1

Maria Driver decides to drive to El Paso for a meeting (1,100 mile round trip). At 54.5 cents per mile, the calculated mileage reimbursement would be \$600. If the cost of flying to the meeting would have been \$450, the mileage reimbursement is limited to \$450.

- 6.5.2. Mileage driven while at the travel destination is not reimbursable.
- 6.5.3. University insurance does not cover privately owned or -leased vehicles. In order to use a privately owned or leased vehicle on University business, the traveler must carry auto liability insurance levels of at least the minimum required by Texas law plus personal injury protection benefits. The traveler is responsible for all insurance coverage relating to the use of a privately owned or -leased vehicle.
- 6.5.4. When a University-owned vehicle is used, reimbursement based on mileage is *not allowed*. Only actual gas expenses are reimbursable. Receipts for gas purchases must be submitted with the Reimbursement Request.
- 6.5.5. Mileage is reimbursable at the current IRS mileage reimbursement rate. If the mileage reimbursement rate allowed by current State and/or A&M System regulations is less than the IRS rate, such lower rate must be used.
- 6.5.6. Mileage for travel using personal vehicles can be calculated by Concur based on input origin and destination information. If Concur is unable to calculate mileage, it should be determined using MapQuest, Google Maps, or another commonly used mapping service. If the mapping service does not have the specific travel origin or destination address, the closest point to the origin or destination must be used to calculate mileage reimbursements.

- 6.5.7. Travelers are not required to submit supporting documentation, such as a printout from a mapping service, for actual mileage with the Reimbursement Request. However, the origin and destination addresses for each leg of travel should be noted in sufficient detail to allow a determination about whether the claimed mileage is reasonable.
- 6.5.8. Travelers are expected to utilize the “shortest time” or “shortest distance” route option generated by the mapping service. If neither of these routes is viable for some reason, the reason for using a different route must be noted on the Reimbursement Request.
- 6.5.9. Because reimbursement for the use of a personal vehicle is based on reimbursable mileage, the use of University-provided travel cards, fuel cards, fleet cards, etc., for gas purchases is not allowed.

6.6. Rental Vehicles

- 6.6.1. The traveler is responsible for ensuring the procurement of the most economical means of transportation. There may be instances where the most economical form of transportation is not feasible due to other considerations.
- 6.6.2. If circumstances make use of a rental vehicle appropriate, the reason for using a rental vehicle must be pre-authorized and/or stated in the traveler’s Reimbursement Request.
- 6.6.3. Gasoline purchases for a rental vehicle are reimbursable. Receipts are required for reimbursement.

CAUTION

Mileage reimbursement is not allowed for the use of rental vehicles. Only actual gas purchases are allowed.

- 6.6.4. University-provided travel cards may be used to purchase gas for a rental vehicle.
- 6.6.5. Receipts for rental vehicles must be included in the traveler’s Reimbursement Request.

6.7. Incidental Expenses

- 6.7.1. Incidental expenses are any ordinary, necessary, and reasonable overnight travel-related expenses not specifically addressed above. Examples include, but are not limited to:
 - 6.7.1.1. Business phone calls
 - 6.7.1.2. Internet access fees
 - 6.7.1.3. Repair charges when a University-owned vehicle is used

- 6.7.1.4. Copying and duplication charges
 - 6.7.1.5. Notary fees
 - 6.7.1.6. Books or documents purchased while attending a seminar or conference
 - 6.7.1.7. Fax charges
- 6.7.2. Receipts for all incidental expenses of \$25 or more, in total by type of incidental expense, must be submitted with the Reimbursement Request.

EXAMPLE 4.8.2

Joe Traveler is staying in a hotel that charges \$7 per day for internet access. He stays for four nights. Because the total charged for internet access is \$28, Joe must submit an appropriate receipt in order to be reimbursed.

7. TRAVEL PROCEDURES – OUT-OF-STATE

Out-of-state travel is any travel where a portion of the travel takes place outside the state of Texas, and inside one or more of the following:

- the United States;
- a territory or possession of the United States;
- Mexico; or
- Canada

If any portion of the travel goes outside of the areas noted above, the procedures relating to international travel (see Section 9) must be followed.

7.1. Pre-Travel Authorization

- 7.1.1. Pre-travel authorization is required if total travel expenses, including conference registration fees, are expected to exceed \$500. Such authorization is also required if expenses will be incurred for commercial air transportation (see below for additional guidance).

7.2. Commercial Ground Transportation

- 7.2.1. In general, travelers are not expected to utilize privately owned vehicles or University-owned vehicles for ground transportation when traveling out-of-state.
- 7.2.2. When commercial ground transportation is utilized, taxi (including airport shuttles, Uber, Lyft, etc.) fares are reimbursable. Receipts are required for reimbursement if the expense, including any tips, is \$25 or more.

CAUTION

Taxi tips are only reimbursable if the tip is not included in the base fare, and is limited to 15% of the base fare.

EXAMPLE 7.2.2A

Joe Traveler has to take a taxi from his hotel to a meeting, and back. The cost each way, including tip, is \$14.00. Joe must submit receipts for each leg, because the total expense of \$28.00 exceeds \$25.

EXAMPLE 7.2.2B

In the example above, Joe takes a taxi from his hotel to a meeting, but rides back to the hotel with a colleague. Joe does not have to submit a receipt for the taxi fare, because the total expense of \$14.00 is less than \$25.

EXAMPLE 7.2.2C

Jane Traveler has to take a taxi from her hotel to a meeting, and back. The cost each way, including tip, is \$9.00. Jane does not have to submit receipts for the taxi fare, because the total expense of \$18.00 is less than \$25.

7.3. Commercial Air Transportation

- 7.3.1. Commercial air transportation is allowed for out-of-state travel.
- 7.3.2. A pre-travel authorization for the use of commercial air transportation must be submitted and approved.
- 7.3.3. Before arranging for air travel, the traveler must determine the funding source. If the flight is going to be paid for by a federal grant or contract, or charged to a federal project, ensure the booking complies with the Fly America Act. See Section 5.3.3 for details relating to this requirement.

7.4. Lodging

- 7.4.1. Travelers are expected to make hotel reservations utilizing available University lodging contracts. When no contract is available, travelers should stay at a hotel of reasonable quality and price.
 - 7.4.1.1. If the traveler is attending a conference, staying at an official conference hotel is appropriate.

- 7.4.1.2. Generally, the maximum amount allowed for daily lodging expense is the actual cost incurred, not to exceed:
- 7.4.1.2.1. The charge for a single-occupancy room, with either one king-sized bed or two queen-sized beds,
 - 7.4.1.2.2. The maximum lodging allowance rate published by the General Services Administration. See the GSA website at <http://www.gsa.gov/portal/category/21287> for allowance rates by location.
 - 7.4.1.2.3. Exceptions to the above must be approved in advance. If pre-approval is not obtained, payment or reimbursement of the exceptional amounts may not be allowed.
- 7.4.2. Alternative lodging arrangements (e.g., bed and breakfasts, condominiums, etc.) must be pre-approved before the reservation is made. If suitable hotel lodging is available where the overnight stay occurs, the maximum amount allowed for alternative lodging is limited to the amount that would have been incurred had the traveler stayed at the hotel.
- 7.4.2.1. If the traveler stays in a private residence or other non-commercial lodging establishment, no payment of any kind, to either the traveler or the host, is allowed.
- 7.4.3. Whenever a traveler can realize savings through alternative booking providers, any associated fees are reimbursable as long as the total cost (including the fees) is less than the cost that would have been incurred using standard booking procedures.
- 7.4.4. Hotel receipts must be submitted along when the related Reimbursement Request is submitted. Receipts must show:
- The name and address of the lodging establishment,
 - The traveler's name,
 - The single occupancy room rate,
 - A daily itemization of the lodging charges, and
 - Proof of payment showing an ending balance of zero.

The amount to be reported as lodging expense is the cost of the room, plus any taxes (other than Texas sales tax) and mandatory fees. Other expenses charged to the room, such as room service or internet access, must be reported in the appropriate category, not as lodging expense.

7.5. Meals

- 7.5.1. Reimbursement of meals is based on actual meal costs, not to exceed the maximum allowance rates published by the General Services Administration.

Supporting documentation for actual meal costs is not required or accepted. See the GSA website at <http://www.gsa.gov/portal/category/21287> for allowance rates by location.

CAUTION

This does not mean the traveler is automatically entitled to receive the GSA per diem rate. Rather, the per diem rate serves as a cap for actual meal expenses that will be reimbursed.

On travel days, the meal reimbursement is limited to 75% of the GSA per diem rate.

- 7.5.1.1. If a meal is provided to the traveler at no cost, or a meal is purchased using a University travel card, reimbursement for that meal is not allowed.
- 7.5.1.2. Meals provided as part of a conference registration fee are not reimbursable.

EXAMPLE 5.5.1.2

Juan Traveler is attending a conference. Included in the conference fee is lunch each day. Juan chooses to eat at a local restaurant one day rather than at the conference. He is not entitled to reimbursement for lunch on that day.

Conference agendas must be submitted with the Reimbursement Request. These help determine travel days (during which meal expense is limited to 75% of the per diem rate) and identify meals included in the conference fee.

- 7.5.2. In some circumstances, a meal purchased while in overnight travel status may be reimbursable as a business meal expense. For purposes of this section, a business meal is a meal that meets one of the following criteria:
 - 7.5.2.1. The traveler purchases a meal for one or more others; at least one of the other diners is not a University employee; and a substantive business-related discussion takes place during the meal. Meals meeting these conditions are reimbursable as a business meal expense if documentation requirements (the “5Ws”) are met.
 - 7.5.2.2. If the traveler is in overnight travel status, and purchases a meal for other University employees, the expense is reimbursable as a business expense, not a travel expense, if documentation requirements (the “5Ws”) are met.

If the traveler is in local travel status, this type of business meal expense is not reimbursable.

7.6. Privately-Owned Vehicles

7.6.1. In some situations, travelers may choose to use a privately owned or –leased vehicle instead of commercial transportation. In these situations, the mileage reimbursement is limited to the travel expense that would have been incurred as if the traveler traveled commercially. Expenses to be considered in the “as-if” expense include, but are not limited to:

- Airfare
- Mileage to/from the airport
- Parking at the airport
- Shuttle service to/from the airport at the travel destination

EXAMPLE 5.6.1

Maria Driver decides to drive to Oklahoma City for a conference (954 mile round trip). At 54.5 cents per mile, the calculated mileage reimbursement would be \$520. If the cost of flying to the conference would have been \$450, the mileage reimbursement is limited to \$450.

7.6.2. Mileage driven while at the travel destination is not reimbursable.

7.6.3. University insurance does not cover privately owned or -leased vehicles. In order to use a privately owned or -leased vehicle on University business, the traveler must carry auto liability insurance levels of at least the minimum required by Texas law plus personal injury protection benefits. The traveler is responsible for all insurance coverage relating to the use of a privately owned or -leased vehicle.

7.6.4. When a University-owned vehicle is used, reimbursement based on mileage is *not allowed*. Only actual gas expenses are reimbursable. Receipts for gas purchases must be submitted with the Reimbursement Request.

7.6.5. Mileage is reimbursable at the current IRS mileage reimbursement rate. If the mileage reimbursement rate allowed by current State and/or A&M System regulations is less than the IRS rate, such lower rate must be used.

7.6.6. Mileage for travel using personal vehicles can be calculated by Concur based on input origin and destination information. If Concur is unable to calculate mileage, it should be determined using MapQuest, Google Maps, or another commonly used mapping service. If the mapping service does not have the specific travel origin or destination address, the closest point to the origin or destination must be used to calculate mileage reimbursements.

- 7.6.7. Travelers are not required to submit supporting documentation, such as a printout from a mapping service, for actual mileage with the Reimbursement Request. However, the origin and destination addresses for each leg of travel should be noted in sufficient detail to allow a determination about whether the claimed mileage is reasonable.
- 7.6.8. Travelers are expected to utilize the “shortest time” or “shortest distance” route option generated by the mapping service. If neither of these routes is viable for some reason, the reason for using a different route must be noted on the Reimbursement Request.
- 7.6.9. Because reimbursement for the use of a personal vehicle is based on reimbursable mileage, the use of University-provided travel cards, fuel cards, fleet cards, etc., for gas purchases is not allowed.

7.7. Rental Vehicles

- 7.7.1. The traveler is responsible for ensuring the procurement of the most economical means of transportation. There may be instances where the most economical form of transportation is not feasible due to other considerations.
- 7.7.2. If circumstances make use of a rental vehicle appropriate, the reason for using a rental vehicle must be pre-authorized and/or stated in the traveler’s Reimbursement Request.
- 7.7.3. Gasoline purchases for a rental vehicle are reimbursable. Receipts are required for reimbursement.

CAUTION

Mileage reimbursement is not allowed for the use of rental vehicles. Only actual gas purchases are allowed.

- 7.7.4. University-provided travel cards may be used to purchase gas for a rental vehicle.
- 7.7.5. Receipts for rental vehicles must be included in the traveler’s Reimbursement Request.

7.8. Incidental Expenses

- 7.8.1. Incidental expenses are any ordinary, necessary, and reasonable overnight travel-related expenses not specifically addressed above. Examples include, but are not limited to:
 - 7.8.1.1. Business phone calls
 - 7.8.1.2. Internet access fees
 - 7.8.1.3. Repair charges when a University-owned vehicle is used

- 7.8.1.4. Copying and duplication charges
 - 7.8.1.5. Notary fees
 - 7.8.1.6. Books or documents purchased while attending a seminar or conference
 - 7.8.1.7. Fax charges
- 7.8.2. Receipts for all incidental expenses of \$25 or more, in total by type of incidental expense, must be submitted with the Reimbursement Request.

EXAMPLE 4.8.2

Joe Traveler is staying in a hotel that charges \$7 per day for internet access. He stays for four nights. Because the total charged for internet access is \$28, Joe must submit an appropriate receipt in order to be reimbursed.

8. TRAVEL PROCEDURES – WASHINGTON, D.C.

This section addresses additional procedures for travel to the Washington, D.C., area *only if the travel involves obtaining/spending federal funds or impacting federal policies*. The procedures in Section 7 for out-of-state travel must also be followed.

- 8.1. Seven (7) days prior to the travel date, the traveler is required to inform the state Office of State-Federal Relations (OSFR).
- 8.2. Office notification will be submitted via the OSFR website at http://governor.state.tx.us/osfr/forms/state_funded_DC_travel/.
- 8.3. The A&M-San Antonio agency code to be used is 749.

9. TRAVEL PROCEDURES – INTERNATIONAL

International travel is travel to/from any destination that is not in:

- the United States;
- a territory or possession of the United States;
- Mexico; or
- Canada

The procedures in Section 7 for out-of-state travel must also be followed.

- 9.1. All international travel *must be pre-approved* by the President or designee.
- 9.2. Payment or reimbursement for all lodging and meals is limited to actual amounts denominated in or converted to U.S. dollars.
 - 9.2.1. When a University travel card is used, the conversion is calculated by the credit card provider.

- 9.2.2. When a personal credit card is used, the traveler must submit a copy of the credit card statement showing the transaction. The U.S. dollar amount shown on the statement will be the amount eligible for reimbursement.
- 9.2.3. When foreign currency is used, the traveler must determine the appropriate exchange rate at the time of the transaction using the foreign exchange website at <http://www.xe.com>.

10. TRAVEL PROCEDURES – PROSPECTIVE EMPLOYEES

Pre-authorization of travel for prospective employees is not required.

- 10.1. The University may request that a prospective employee travel for purposes of an interview or an evaluation. At the discretion of the President, travel accommodations related to University executive positions (i.e., the President and members of the President’s cabinet) are exempt from these procedures.
- 10.2. The search committee chair or delegate is required to make travel and lodging arrangements for prospective employees. When booking travel and lodging, the procedures in Section 7 must be followed. The prospective employee’s interview agenda must be included with the Reimbursement Request, and must include the prospective employee’s name, date of the interview and the operating account to be used for the travel expenses.
- 10.3. Prospective employees must submit receipts for **all** out-of-pocket expenditures in order to be reimbursed.
- 10.4. Prospective employee use of a rental vehicle while in San Antonio is not allowed without prior written approval of the search committee chair and the applicable vice president.

CAUTION

Rental vehicles for prospective employees are **not allowed** under the terms of the University’s contract with Enterprise. Approved vehicle rentals must be made and paid for with personal funds by the prospective employee. The prospective employee must submit the rental receipt in order to be reimbursed.

- 10.5. Reimbursement for meals while traveling (including meals while staying in a hotel) is allowed for prospective employees.
- 10.6. The prospective employee must submit a Form W-9 to the search committee chair or designee, who is then responsible for forwarding the form to Procurement. Reimbursement will not be made until a completed Form W-9 is received.

11. TRAVEL PROCEDURES – STUDENTS

- 11.1. See University Procedure 13.04.99.O1.01 for additional guidance relating to student travel.
- 11.2. In general, travel procedures for student travel are the same as those for faculty and staff. See Sections 4 (Local travel), 5 (In-state travel with an overnight stay), 6 (In-state travel without an overnight stay), 7 (Out-of-state travel), and 9 (International travel).
 - 11.2.1. Student travelers must submit receipts for *all* expenditures in order to be reimbursed.
- 11.3. Student travel reimbursement is allowed only for organized student travel by one or more students currently enrolled at the University, when the activity is:
 - Sponsored and/or funded by the University; or
 - Coordinated by a student organization properly registered at the University.
- 11.4. When a student requests reimbursement be made to themselves, the student must submit a Form W-9 to Procurement Services before the reimbursement will be paid.
- 11.5. For risk management purposes, preauthorization of student travel is required. The travel request must include the names of all A&M-San Antonio students and all others who are traveling with the students.