

UNIVERSITY OF HAWAII
COMMUNITY COLLEGES GUIDELINES

Replaces Employee Travel dated March 2015

EMPLOYEE TRAVEL

Revised April 2016

To establish guidelines for employee travel for the UH Community Colleges (UHCC). These guidelines standardize certain travel procedures and processes and shall be used in support of UH APM A8.851 Employee Out-of-State and Intra-State Travel.

I. Related University Policies

- A. UH Board of Regents Policies, Chapter 8, RP 8.208 Travel
hawaii.edu/policy/?action=viewChapter&policySection=rp&policyChapter=8
- B. UH Systemwide Executive Policies EP 8.208 Travel
hawaii.edu/policy/?action=viewPolicy&policySection=ep&policyChapter=8
- C. UH Systemwide Administrative Procedures A8.851 Employee Out-of-State and Intra-State Travel
hawaii.edu/policy/?action=viewPolicy&policySection=ap&policyChapter=8
- D. E-Travel Home Page
hawaii.edu/etravel/index.html
- E. E-Travel Frequently Asked Questions hawaii.edu/etravel/faq_storyboard

II. Roles and Responsibilities

- A. Traveler – Requests approval for intra-state/out-of-state travel. Upon completion, certifies that the trip was taken and expenses listed were incurred for official business.
- B. Supervisor (signature line: Approving Authority) – Approves intra-state travel. For out-of-state travel, certifies that the purpose of the trip benefits the University, the employee has permission to travel, and the employee's workload is covered.
- C. Executive Approving Authority (signature line: Vice Chancellor/Chancellor/VP/President) – Approves out-of-state travel.
- D. Fiscal Administrator (signature line: Fiscal Officer) – Certifies that funds are available and fiscal policies and procedures have been followed.

- E. Principal Investigator (PI)/Account Supervisor (signature line: Approving Authority) – Authorizes use of the account code(s) to fund the trip, and that it supports the grant/program activities.
- F. Disbursing Office – Audits for procedural compliance.

III. Approval to Travel

- A. For intra-state travel, campuses are allowed to use their discretion in the establishment of internal control requirements.
- B. For out-of-state travel, the travel must be approved **BEFORE** any University fund commitments are made and **PRIOR** to departure (i.e., the P-Card cannot be used unless the travel has been approved).
- C. Travel for training does not require UH Form 410. Proper administrative approval of the travel and/or registration fees on the travel request shall be considered as approval of the proposed training.

IV. General Guidelines

- A. The purpose/justification should specify the name, date and place of the meeting, conference, workshop, or seminar; if not, state the nature of the task to be performed.
- B. Documentation which provides a basis for the travel should be submitted with the travel request, e.g., conference agenda.
- C. A business itinerary that includes the business destination, travel dates, travel times, etc., shall be included with the travel request.
- D. All claims of expenses should be necessary and reasonable in nature and amount.
- E. Transportation should always be by the most economical and direct route.
- F. Airfare shall be coach/economy class.
- G. Travel completion should have receipts attached to support actual costs and expenses for the trip.

V. Travel Including Business and Personal Time

If travel includes business and personal time, travel advances shall be provided for the business days only. Two airfare/airline itineraries shall be submitted with the travel request. Travelers must obtain a comparison airfare quote with dates and times based on the most direct economical route to the business destination, in addition to the actual airfare/airline itinerary that includes personal time. Reimbursement will be the lessor of the two. Requirements are:

- A. Quote for the actual airfare itinerary with personal time.
- B. Quote for the comparison airfare itinerary showing flights with dates, times and cost for business portion only, had personal time not been included.
- C. All airfare quotations should be obtained on the same day for meaningful cost comparisons.
- D. Airfare quotations can be for multiple carriers from one source (e.g., travel agent, travel websites) or from multiple sources.
- E. The University P-Card cannot be used for airfare if the travel includes personal time.

VI. Lodging

- A. Federal Allowable Rates (FAR) are used as the base rate for computing lodging costs for the place of business. For example, if the traveler lodged in a different city than the place of the conference, FAR would be used for the city where the conference is being held.
- B. Lodging costs in excess of the FAR is considered excess lodging and must be approved in advance on the travel request.
- C. If excess lodging is being claimed on the travel completion, and it was not approved in advance on the travel request, the Executive Approving Authority must approve the excess lodging on the travel completion (4th line approval).
- D. Attach hotel lodging cost support (e.g., conference brochure, quote from hotel).
- E. If the traveler is staying at the conference hotel, cost comparison quotes for other hotels are not required.
- F. If the traveler is not staying at the conference hotel, and the hotel rate exceeds FAR (excess lodging):

1. Hotel cost must be reasonable. Provide a justification in the comments section if not staying at the conference hotel.
2. One additional cost comparison quote for hotel lodging is required to establish price reasonableness.
 - a. When comparing FAR to the actual lodging cost for Continental US cities (CONUS), the FAR does not include taxes.
 - b. When comparing FAR to the actual lodging cost for Outside Continental US cities (OCONUS), the FAR includes taxes and other related charges.

G. Out-of-State Travel

1. When claiming hotel lodging, the employee shall be scheduled to arrive at the business destination no more than one day before the conference starts.
2. When claiming hotel lodging, the employee shall be scheduled to depart the business destination at the earliest time practicable but no later than noon the day after the conference ends.

H. Hotel Receipts

1. Hotel receipts are required for reimbursement. Receipts must show proof of payment (zero balance), itemized, name of occupant, and dates of stay.
2. If a receipt is not available, an attempt by the department should be made to contact the vendor for an official copy of the receipt showing proof of payment.
3. If a vendor receipt is not available, a copy of the credit card statement showing the expense is acceptable as proof of payment; however, documentation showing the actual detail of expenses or charges is still required.

VII. Meals and Incidental Expenses (M&IE)

- A. If there is a set rate for conference registration such that the traveler doesn't have the option of excluding meals, then M&IE should not be deducted.
- B. If conference registration has an option to include meals for an additional cost and the traveler selects this option, then M&IE shall be deducted based on the following percentages:

1. Breakfast 20% of M&IE
2. Lunch 30% of M&IE
3. Dinner 50% of M&IE

C. Out-of-State Travel

1. In computing the amount of M&IE, 3 hours are allowed for travel time before the scheduled flight departure time.
2. In computing the amount of M&IE, the employee shall be scheduled to arrive at the business destination no more than one day before the conference starts.
3. In computing the amount of M&IE, the employee shall be scheduled to depart the business destination at the earliest time practicable but no later than noon the day after the conference ends.

D. Intra-State Travel: In computing the amount of M&IE, 90 minutes is allowed for travel time before the scheduled flight departure time.

VIII. Car Rental

- A. Limited to compact or sub-compact vehicles. Only under special circumstances and with written justification will larger vehicles be allowed. Justification for larger vehicles shall be submitted with the travel request/purchase document for approval by the PI/Account Supervisor.
1. If the traveler is staying at the conference hotel, car rentals are not allowed, unless special circumstances exist and are approved on an exception basis. Driving to eateries for lunch or dinner is not an acceptable justification. A written justification and cost analysis shall be submitted with the travel/purchase document for approval by the PI/Account Supervisor.
 2. If car rental includes personal time, the traveler shall pay with personal funds, and the cost of car rental and gasoline will be prorated and reimbursed for the business portion on the travel completion.
 3. Collision Damage Waiver is the only out-of-state car rental insurance allowed.
 4. Reimbursement for Frequent Flyer Fees is not allowable.

IX. If Traveler A Pays for Traveler B's Expenses, e.g., airfare, hotel (two options)

- A. Traveler A may claim the expense for both Travelers A and B costs. This method may be used if the same account is being charged for both travelers. The travel documents for Travelers A and B should reference the other traveler's document number so as not to have a duplicate claim and include an explanation. The travel documents should also be submitted together to the Business Office if within the same campus.
- B. Travelers A and B may claim the expense on their own travel completions. This method would be used if different accounts are being charged for both travelers. Travelers shall work out reimbursement between each other. The travel documents for Travelers A and B should reference the other traveler's document number, and include an explanation.

X. Travel Advance

Travel advances may be requested for out-of-state travel, and intra-state travel exceeding four (4) calendar days. Documents required for travel advances include:

- A. Airfare (print out of quote): Airfare quotation can be directly from the airlines, a travel agent or other travel websites. If cost of airfare is greater than \$2,500, three (3) verbal quotations for air travel either from three (3) different vendors, e.g., travel agencies, or from one (1) vendor for three (3) different airlines.
- B. Hotel (print out of quote with lowest rate from a minimum of two quotes, if it is not a conference hotel): Hotel quotations can be directly from the hotel or other travel websites.
- C. Car rental (print out of quote). Car rental quotations can be directly from the car rental agency or other travel websites.
- D. Registration Fee (conference registration form showing fee schedule)
- E. Meals and Incidental Expenses (print out of Federal Allowable Rates for the applicable business destination city)
- F. If the amount of the advance exceeds the reimbursable expenses, payment from the traveler for the amount due shall be submitted with the travel completion.

XI. Other

- A. Conference brochures showing dates, times, location, hotel information, registration form, transportation, etc., are required with the travel request.

- B. All items requested as a travel advance shall have quotes attached as support documentation.
- C. Receipts that have been lost or not available: Form DISB 4D – “Receipt Summary Worksheet” may be completed and certified by the traveler. The maximum amount that can be claimed is \$75 per receipt.
- D. Boarding passes are not required to be submitted with the travel completion. The airfare/airline itinerary should be used to support departure and return times.
- E. If there were changes to the itinerary, reflect revised dates and times on the travel completion in the e-travel itinerary and provide an explanation in the comments section.