**Travel Policies and Procedures:**

1. **Fill out the *Prior Approval Travel Request Form*** and turn into Department Administration. Obtain Chair (Mark Zylka) approval on the form if personal days are indicated.
2. **Contact Maupin Travel 919-967-8888** - to arrange your travel plans. Have the travel agent send Jennifer Moore and Sausyty Hermreck the itinerary for payment. <http://finance.unc.edu/departments/strategic-sourcing-payment/procurement/sysops/travel/airfare-request/>
3. **Personal days -** If you are incorporating personal days into a business trip, and wish to be reimbursed for your flight, you must obtain two flight itineraries from the travel agent. One with just the business days and the second with the personal days included and you will receive reimbursement for the cheaper of the two flights no matter the amount paid. If you do not submit proof of the cheaper flight and have personal days on the trip, your flight will be pro-rated for reimbursement of only the business days.
4. **Mandatory if flying international** – notify admin. staff of foreign travel plans to have an IPAS form processed and contact Janet Hoernke at Janet\_Hoernke@unc.edu to obtain travel insurance. **You must fly a U.S. carrier**.
5. **Conference registration** – submit conference registration form to Jennifer Moore so payment can be paid directly to the Conference in advance of the trip. Curriculum students will submit to Denise Kenney.
6. **Fill out the *Travel Reimbursement Request Form* and attach receipts within 30 days of completion of the trip.** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Other things to consider when travelling:**

**Travel Advances - can only be requested for international travel (only exception Students)**:

*Lodging* – must be staying at a place that is open to the public, cannot be a privately owned house, condo, etc. and you must provide an itemized receipt broken down by days stayed.

* *Privately owned but commercially available lodging (Airbnb, VRBO, etc*..) must have 3rd party authorization. That form is here: <http://financepolicy.unc.edu/policy-procedure/1305-third-party-lodging/1305-1-requesting-third-party-lodging-reimbursement/>
* *If lodging is being split among multiple occupants, a memo must accompany the lodging receipt, explaining in detail who the occupants were and how the receipt was split.*

*Meals* – will be given in advance for the days that you are traveling on University business.

*Conference registration* – can be given in advance only if being paid directly to the conference venue via Invoice. If you pay out of pocket for your registration, you cannot be reimbursed until you return from the trip.

**Meals** will be reimbursed for overnight trips only, at the State per diem rates for In/Out of State (below). ***Out of Country rates are country dependent*** and are only given if travelling on Federal Funding (see policy <https://unc.policystat.com/policy/5256375/latest/>). If the trip is to be paid from State-appropriated or F&A funds, the maximum per diem amount allowed for meals is $40.50. Trips funded by discretionary funds are reimbursed at the out-of-state per diem rate. Some federal contracts and grants allow meal reimbursement based on the [U.S. State Department allowances .](https://www.state.gov/travel/index.htm) <https://aoprals.state.gov/web920/per_diem.asp> . *Receipts for meals will not be collected and you cannot get reimbursed for meals that you pay for that exceed the established per diem rates.*

|  |  |  |
| --- | --- | --- |
|  | In-State | Out-of-State |
| **Breakfast** prior to 6am | $    8.40 | $    8.40 |
| **Lunch** prior to noon or return after 2pm | $  11.00 | $  11.00 |
| **Dinner** prior to 5pm or return after 8pm | $  18.90 | $  21.60 |
| Lodging | $  71.20 | $  84.10 |
| Total | $109.50 | $125.10 |

**Clarification to UNC Policy on Excess Lodging Expenses.**  Excess lodging expenses must be justified if hotel rates, excluding taxes and surcharges, exceed **$300 per night** (or **$400 per night**, if staying in one of the following high-cost cities: Boston, New York City, San Francisco and the Bay Area, Washington DC, and Los Angeles).  If those limits are exceeded, travelers must complete [**Form 1302.1.1f Excess Lodging Justification**](https://pstat-live-media.s3.amazonaws.com/attachments/document_30/4732679/5e201e66-187e-4bd0-bf7b-c7596fa053af/1302.1.1f%20Excess%20Lodging%20Justification.pdf?Signature=6xnO9kteSAP4hB73QYDUEvTUym4%3D&Expires=1524685223&AWSAccessKeyId=AKIAIR7CUSS72DOCIELA) and obtain their supervisor's approval and signature before travelling.  Only five justifications are acceptable to claim excess lodging reimbursement:

* the hotel is where the conference is located
* the hotel is in a high-cost area (and documentation is provided showing this hotel was the most reasonable price)
* the safety and security of the traveler was unattainable at the current allowance (a statement due to this effect must be provided and documentation is provided showing this hotel was the most reasonable price)
* The hotel had a discounted rate because it was suggested by the conference

The traveler shared this room with a colleague

**Submit all receipts within 30 days of completion of the trip.** If you received an advance and no other expenses were incurred, you still have to work with the Administration office to process a Travel reimbursement to reconcile all funds that were given as an advance or these funds will be deducted from your paycheck.

**Foreign Travel** – An IPAS form must be completed by the Administrative Staff prior to any foreign travel. Some grant agencies do not allow or require prior written approval, verify first.

**Effective August 15, 2016, University faculty and staff needing short-term vehicle rentals will use EHI Direct to book an Enterprise Rent-a-Car vehicle:** [**http://facilities.unc.edu/operations/fleet/vehicle-rental/**](http://facilities.unc.edu/operations/fleet/vehicle-rental/)

For step-by-step instructions on using this system, please refer to this PDF: <https://facilities.unc.edu/files/2017/10/EHIDirect-User-Guide.pdf>

**State Mileage Allowance Chart for Personal Vehicle Mileage Reimbursement**  
In the event that an employee does not use a state-owned vehicle or vehicle leased through a state contract, the following rates apply for trips on or after Jan. 1, 2017:

|  |  |
| --- | --- |
| Round trip does not exceed 100 miles | 54.5 cents per mile |
| Round trip exceeds 100 miles | Total round trip mileage reimbursable at 54.5 cents/mile for the first 100 miles per day of travel, and 33 cents/mile for each additional mile thereafter. |

FAQ’s

* Travel requests should generally be “one-to-one” – one request per traveler/one traveler per request.  Group registration/requests are not allowable in Web Travel.
* Payment is only issued to traveler who will incur/incurred the expense, regardless of who paid for the cost.
* Group travel is generally not processed thru Travel.  An exception may be if 2 or more UNC travelers are sharing a room.  The total room expense may be submitted by 1 of the occupant travelers or split between the 2.  However, a traveler may not request a reimbursement for 2 separate rooms.  Each occupant will need to submit an individual request and the 2nd occupant will be responsible for reimbursing the paying party.
* Travel requests, depending on the expense, should always be supported by documentation (receipt/proof of payment, invoice, etc.).  On a case by case basis, a lost receipt memo signed by the traveler may suffice in lieu of a receipt for small expense items.
* All travel advances and reimbursements require a personally signed Traveler Acknowledgement Form.  Digital signatures are generally not acceptable.
* Travel advances are issued out of Travel’s funds, creating an account receivable (open prepayment) for the traveler.
* Travel advances are issued as paper checks as they are from a separate bank account that does not have ACH capabilities.
* Only when the reimbursement is processed using the same Document ID (T#) is Travel’s funds repaid and the department’s funds charged for the expense(s).
* Traveler checks for unspent travel funds should be made payable to UNC-CH and forwarded to Travel Services (CB# 1230).
* Traveler checks for unspent funds should be received at Travel Services before the reimbursement can be reviewed.
* Items generally not allowable with a registration request include:  membership fees/dues, tours, networking lunches, license fees, etc.
* An item may be deemed allowable when justification is provided by the department to show the business purpose or benefit to UNC’s mission or when using a foundation fund (a non-UNCCH Business unit -- e.g., CHMED, CHFDN, CHJRN, etc.).
* Credit card statements, by themselves, are generally not acceptable proofs of payment as they do not include enough details to show what was paid for and for whom.
* Mileage is always measured from the closer of point of departure or duty station (generally designated as The Well at UNC-CH).
* Maximum one-way mileage reimbursement from UNC-CH to RDU is 18 miles.  Calculated from The Well at UNC-CH.