

413. Travel Guidelines

I. General

It is the policy of the University to reimburse its employees who travel at the request of the University for reasonable and necessary expenses incurred while traveling on authorized University business. The implementation of this policy is reflected in the spirit of the guidelines set forth below. In this regard, these guidelines are not intended to replace the good judgment of those responsible for their execution. Circumstances and differences in responsibilities may dictate exceptions. In such cases, appropriate action should be characterized by prudence and a responsibility to safeguard public funds.

A. Authorization

All travel, whether in or out of State, for which the necessary and actual expenses thereof may be reimbursed, shall be approved by the President or his/her designee.

B. Necessary and Actual Expenses Reimbursable

Only actual and necessary expenses of official travel shall be reimbursed. All travel shall be by the most economical route practical and any person traveling by another route, without adequate justification therefor, shall assume any additional expense incurred thereby. Where for the traveler's personal convenience there is interruption of travel or deviation from the direct route, the travel allowance will not exceed that which would have been incurred on uninterrupted travel.

C. Annual, Sabbatical, or Sick Leave

1. An employee in official travel status may be granted annual leave. Travel expenses shall not be allowed during the periods of such leave.
2. An employee may be granted travel expenses during a period of sabbatical leave if such expenses are incurred incident to official travel and in the performance of official duties.
3. An employee may be continued in travel status if he or she becomes incapacitated due to illness or injury that qualifies for official sick leave; however, medical expenses that may be incurred shall not be charged to travel expense.

D. Official Station

The official station of an employee is the office and/or campus to which an employee is normally assigned. Transportation costs between an individual's domicile and official station shall not be allowed.

E. Timeliness

To ensure that the University's travel reimbursement policies continue to qualify as an "Accountable Plan" (as defined by Internal Revenue Service guidelines), all travel expense claims shall normally be filed within sixty (60) days of the date that the expenses were incurred.

II. Claim Certification

A diligent effort shall be made by University personnel responsible for certifying claims for reimbursements to ensure that expense accounts submitted are reasonable and accurate and cover only expenses actually incurred by the traveler in the interest of the University.

III. Transportation

Responsible personnel shall ensure that all transportation modes and practices are the most economical obtainable under the circumstances of the travel involved, consistent with their programs, practicality, and the best interests of the University.

A. Accommodations

Tourist (economy) class accommodations shall be used when traveling by commercial airline. Exceptions shall be clearly documented.

B. Special Conveyance

The cost of renting automobiles or other special conveyances may be allowed if public transportation is not available or is impractical to utilize.

C. Public Transportation

Travelers shall employ public transportation where possible in intracity travel. Taxi fare may be allowed when more economical ground transportation is unavailable or impracticable.

D. University-Owned or -Leased Vehicles

1. University-owned or -leased vehicles and credit cards may be utilized for in-state travel when available. These vehicles should be used for out-of-state travel whenever it is most economical and practical.
2. A University-owned or -leased, passenger-carrying vehicle may be operated by any properly licensed adult employed by or enrolled in the University. The vehicle operator's licenses of such individuals must be valid and unrestricted (corrective lenses excluded). Where provision of an automobile for business and personal use is part of an executive compensation package, the automobile may be driven by other properly licensed drivers, age 21 or over, who have been so authorized by the appropriate division of The University of Alabama System.

E. Privately Owned Automobiles

1. Privately owned automobiles may be authorized for official travel. When the use of a privately owned automobile has been authorized, the employee may claim mileage reimbursement for the most direct and usually-traveled route at the rate per mile authorized by the State. However, reimbursement will be limited to the amount that would be incurred if public conveyance had been used.
2. Mileage shall be allowed from the point of origin to the point of destination plus reasonable local mileage for all official travel by private automobile. There is no provision under State Law which allows one's home to be treated as the point of origin or the point of return. However, when business trips originate or terminate at the employee's home because of convenience to the employee, mileage reimbursement to the employee must be the lesser of: (a) an amount based on the distance between home and destination; and (b) an amount based on the distance between office and destination. This will be applicable when the official travel occurs regardless of time of day (including non-business hours), day of the week (including weekends), or official holidays.
3. Actual parking and toll charges incurred during authorized travel by private automobile may be reimbursed.

IV. Subsistence

A. General Limitations

1. Reimbursement shall not be allowed for meals or lodging provided free of charge to an employee in an official out-of-state travel status.
2. See paragraph I.C.1. & 2. with regard to annual or sick leave.

B. Lodging

Adequate accommodations shall be obtained. When a room is shared with other employees on out-of-state travel status, reimbursement shall be calculated on a pro rata share of the total cost. An employee on out-of-state travel status, if accompanied by someone who is not an employee on travel status, shall be reimbursed at the single room rate.

V. Other Expenses

A. Baggage

Charges for baggage in excess of the weight carried free by common carriers are allowable if such excess is used exclusively for official business. Storage and handling charges may also be allowed on the same conditions.

B. Gratuities

Tips to waiters, taxi drivers, and/or housekeepers are allowable when deemed by administration to be reasonable and necessary. Gratuities claimed as travel expenses should be consistent with levels generally accepted, taking into account geographical location, type of services provided, and any special circumstances.

C. Porterage

Reasonable expense for baggage handling services are allowable for delivery to or from a common carrier and delivery to or from a lodging accommodation.

D. Registration Fees

The payment of registration fees which are required as admittance fees for participation in meetings are allowable. Organizational membership dues, as distinguished from registration fees, shall not be processed for payment as travel.

E. Telephone and Facsimile

Expenses for necessary official telephone and facsimile services are allowable. Whenever possible, telephone calls to an activity's central office shall be made direct dial.

F. Other

Other miscellaneous expenses including laundry, valet service, and other similar personal expenses are allowable provided that they are incurred incident to official travel and are necessary in the performance of official duties.

VI. Reimbursement

University employees shall be reimbursed for authorized travel as follows:

A. In-State Travel

The University shall reimburse its employees for in-state meals and lodging on the basis of a daily rate (per diem). The amount of per diem allowable to employees traveling inside the State of Alabama in the service of the University shall be that amount fixed by the Governor pursuant to the appropriate section of the Alabama Code.

There is no provision under State Law which allows one's home to be treated as the point of origin or the point of return for the purposes of calculating per diem reimbursements. However, when business trips originate or terminate at the employee's home because of convenience to the employee, per diem payments to the employee must be the lesser of: (1) the amount based upon the home as the point of origin/return; and (2) the amount based upon the office as the point of origin/return. This will be applicable when the official travel occurs regardless of time of day (including non-business hours), day of the week (including weekends) or official holidays.

Each campus may, if it deems appropriate, establish a scheduled reduction in per diem to apply when the University has otherwise covered the cost of overnight lodging and/or meals.

B. Out-of-State Travel

The amount allowable employees traveling outside the State of Alabama in the services of the University shall be the amount of their actual and necessary expenses. Individual campuses may establish maximum amounts for lodging and meals.

C. Reimbursement from Funds Available Through Outside Contract

If reimbursement is to be made from funds available through a contract between an outside sponsor and the University and such contract expressly provides a measure of reimbursable travel expense, persons traveling in the service of the University shall be reimbursed in accordance with the terms of the contract but cannot be reimbursed in excess of the amount allowed by State law.

D. Foreign Travel

All University-related foreign travel requires written prior approval from the President or his or her designee. In addition, foreign travel on federally sponsored grants and contracts must have prior approval from the sponsoring agency.

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