



Policy and Procedures for University Travel

(Approved by the President on November 14, 2005; revised March 3, 2006)

I. PURPOSE

This policy is written pursuant to the University System of Maryland Board of Regents policy VIII-11.00 Policy on University System Travel. This policy is intended to facilitate travel and travel arrangements; to provide full reimbursement for all necessary expenses; and to protect travelers against the risk of loss, while simultaneously maintaining the necessary controls for accountability. This policy is further intended to ensure that all travel arrangements are reasonable and appropriate to the trip. This policy is applicable to employees and nonemployees while traveling on official UMBI business. Employees, as well as nonemployees, traveling on UMBI business are expected to exercise reasonableness when incurring expenses that will be reimbursed at the conclusion of their trip. This policy establishes procedures for travel arrangements through the University's preferred travel agencies and reimbursement mechanisms for employees and nonemployees to recover travel expenses.

II. BACKGROUND

The University System of Maryland's travel policies and procedures approved by the Board of Regents are intended to:

- A. Facilitate travel arrangements
- B. Define responsibilities for travel authorization
- C. Provide guidance for the allowable expenditure of travel funds
- D. Provide guidance for supporting documentation
- E. Provide reimbursement for all allowable expenses incurred in connection with UMBI related travel.

III. POLICY

A. Travel Approval

All UMBI out of state travel is to be documented and approved prior to commencement of the trip regardless of fund source. This includes in-state travel with an overnight stay. For travel approval purposes, UMBI business conducted in the "Washington D.C. – Metropolitan Area" including the Virginia counties of Arlington, Fairfax and Loudoun and the Virginia cities of Alexandria, Fairfax and Falls Church are classified as in-state travel. Approval must be complete prior to commencement of the trip to ensure Workers Compensation coverage.

B. Restricted Funds

For travel on restricted funds, units are responsible for identifying sponsor restrictions and prior approval requirements. Units will coordinate with UMBI Office of Research and Development to obtain all necessary sponsor approval prior to making any travel arrangements.

C. Reservations and Ticketing

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Travelers and travel arrangers should ensure that all arrangements are reasonable and appropriate and should be aware of the possibility of obtaining air, hotel and rental car services at the discount rate(s) available to the University/System or campus. Travelers are expected to make advance bookings, using the least expensive logical fare via the most direct route (or other reasonable routing resulting in a lower fare) and encouraged to purchase air and rail tickets and reserve in-trip services through the UMBI preferred travel agencies.

Use of a travel class other than the most economical is allowed only in circumstances where the most economical fare is unavailable. An explanation of these circumstances in writing must be included with the travel request. In the absence of an explanatory statement, the travel request is not to be approved and reimbursement will be reduced to the coach or standard fare for the service used.

If the traveler uses a travel agency other than the University's preferred travel agencies, the traveler must personally pay and subsequently be reimbursed at the conclusion of the trip with the appropriate receipts included with the Expense Statement and travel approval.

In the event of changed plans, UMBI will pay cancellations and/or other penalties provided that the cancellation or change was made for the convenience of the campus or was necessitated by circumstances of an emergency nature affecting the traveler. These situations must be documented in writing and attached to the respective approved Expense Statement and travel approval.

D. Hotel, Meal and Other Expense Reimbursement

The cost of hotel accommodations will be reimbursed on the basis of a single room rate and with original dated receipts. Any overage above the single room rate, which is a result of non-official travelers using the accommodation, will be the personal financial responsibility of the traveler.

For domestic travel, travelers are not required to provide individual meal receipts or to show a per meal breakdown for daily travel using the Standard or High-Cost per diem rates. The Chancellor will identify the locations designated as high cost. The Board of Regents will review the rates biennially.

Foreign travel meals are reimbursed at actual costs with receipts or at the applicable U.S. Department of State Meal and Incidental Rates (M&IE) without receipts. Log on to <http://www.dbm.maryland.gov> for current rates. A partial day's travel is eligible for the appropriate meal(s) consumed.

E. Other

Original receipts are preferred for all expense reimbursements except per diem. Original receipts are not required for individual expenses of less than \$25. In cases where original receipts are not available for expenses over \$25, traveler will certify that original receipt was not available and expenses have not been previously reimbursed.

F. Guidelines For Meal Reimbursements Are As Follows:

The cost of breakfast and/or dinner is reimbursable when an employee must leave home and/or return home, in travel status on official business, two hours before or after the normal workday. The two hours are in addition to the normal commuting time.

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The cost of lunch is reimbursable when an employee is in travel status for a normal work day.

When an employee is attending a meeting, seminar or convention and a meal is part of the cost of registration, any additional cost for the same meal (such as per diem) is not normally reimbursed to the traveler.

Under special circumstances, and where UMBI's public or professional image is best served, or in conjunction with the interviewing of prospective candidates, the reasonable cost of a meal up to 3 times the established per diem per person will be reimbursed upon submission of itemized paid receipt. Costs in excess of the established maximum will be considered as extraordinary circumstances and must be approved by the President in order to be reimbursed. The cost of alcoholic beverages will not be reimbursed under any circumstances.

G. Use of Institution Vehicles

State (i.e. institution or System owned) vehicles (other than exclusively assigned to the President) may be driven only by UMBI officers and authorized UMBI personnel and only when acting within the scope of their public duties. Any person driving a state owned vehicle must have a valid driver's license, comply with all traffic laws and obtain approval as required by UMBI policies and procedures on use of state vehicles. The State of Maryland self-insurance includes collision coverage for state vehicles as well as personal immunity from suit and judgment for authorized employees while operating state vehicles within the scope of their public duties and within the state of Maryland only. The State of Maryland self-insurance does not cover state vehicles outside of Maryland, including Washington DC and Virginia. Usage of a state vehicle outside the state of Maryland requires approval from the unit head. Employees should be aware of potential personal liability for state vehicles taken out of the state of Maryland.

H. Use of Personal Vehicles

Properly insured personal vehicles may be used for travel on UMBI business. The use of a personal vehicle will be reimbursed at the rate established by the USM when travel is in compliance with UMBI procedures. Reimbursable mileage is based on official business mileage accumulated in a privately owned vehicle that exceeds the normal round trip mileage incurred from the employee's home to the permanently assigned office or work station. The amount reimbursed is intended to cover all costs of the vehicle operation including but not limited to gas, oil, tires, depreciation, repairs, insurance and similar costs. The settlement of any fines or penalties imposed for traffic or violations is the responsibility of the individual and cannot be claimed for reimbursement.

I. Use of a Rental Car

When a car rental is deemed necessary, UMBI expects the rental of the least expensive car that will accommodate the requirements of the trip. Travelers should take advantage of University/System; federal and state government and institution vendor rates available. UMBI recommends that travelers purchase Collision Damage Waiver (CDW) insurance for travel out of state as the State Insurance Trust Fund covers travelers within Maryland only. All car rental agreements in a foreign country should include CDW coverage whether or not a fee is levied. The traveler will be reimbursed for the cost of the CDW insurance with a valid paid receipt. Be sure the rental agreement includes the traveler's name, UMBI and the State of Maryland as the customer.

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J. Travel with Non-Official Companions

When non-official companions travel with institution employees but are not themselves serving as agents of the institution, traveler should be careful to maintain a record of individual expenses. The institution will not reimburse any expenses incurred on behalf of the non-official companion. Likewise, airfare or any other travel expense that is directly billed to the institution should not include expenses for the non-official companion.

K. Interviewing and Recruitment

Travel expenses incurred with employment interviews and recruitment are reimbursable when authorized. When authorized by a Center Director or President, expenses of a companion accompanying a prospective employee are also reimbursable.

L. Travelers' Insurance

The State provides air travel accident insurance to all active full-time employees of the State traveling on State business. State travel insurance does not cover rail travel. When air and rail tickets are purchased through the University's preferred travel agencies and billed to UMBI, UMBI travelers automatically receive travel and baggage insurance. Also, the University's preferred travel agencies provide each traveler, at no additional cost, automatic common carrier and flight insurance for each trip by air or rail. The beneficiary is to be the traveler's designee. This insurance covers all common carriers and airport transfers.

M. Travel Advances

If an employee traveler anticipates personal financial hardship as a result of the time between the payment of out-of-state travel expenses and reimbursement, he or she may request a travel advance. The unit head or designee and the UMBI Office of Operations and Finance must approve the advance request. Travel advance funds are extremely limited; therefore, advances will only be issued in special circumstances subject to fund availability. The advance amount shall not exceed 80% of the estimate of reimbursable expenses (net of estimated transportation charges from a non-contract travel agency).

N. Non-Reimbursable Costs

- Alcoholic beverages
- Fines
- Hostess gifts
- Lost or stolen tickets, cash or property
- Additional flight insurance premiums
- Costs incurred by unreasonable failure to cancel transportation/hotel reservations
- Expense not directly related to, or necessary for, the purpose of UMBI travel
- Entertainment expenses, except when included as part of a conference package
- Commuting costs to a regularly assigned work location

APPROVED: Jennie C. Hunter-Cevera 3/03/06