

BUSINESS AND FINANCE

SUBJECT: Travel Policy
Number: 600
Issued by: Vice Chancellor for Finance
Date: January 1, 2004

This policy is in accordance with USC Policy Business and Finance 1.00, the full text of which is available at: <http://www.sc.edu/policies/busf100.html>

1. Travel is deemed to be official travel of University faculty and staff while away from the University for the purpose of conducting the business of the University, attending professional meetings, special demonstration meetings and other related meetings. This Policy is applicable to all travel regardless of the source of funds used for reimbursement.

A traveler on official business will exercise the same care in incurring expenses and accomplishing an assignment that a prudent person would exercise if traveling on personal business. Excess costs, circuitous routes, delays or luxury accommodations unnecessary or unjustified in the performance of an assignment are not considered exercising prudence. Travel by commercial airlines will be in coach or tourist class, except where exigencies require an exception. Transportation to and from points of arrival and departure will be by the most economical method. In calculating the most economical method, the travel time and any resulting extra funds used for meals and lodging should be considered in addition to transportation costs.

Reimbursement will vary depending upon the circumstances and conditions, including the extent of benefit expected to accrue to the individual and the University, and the competing demands on available funds. Financial arrangements may vary from token University participation in the costs up the maximum travel and subsistence allowances applicable for regular official travel. Each administrator shall determine in his respective area of responsibility the appropriateness of such travel and the extent to which the University is to participate in defraying travel and subsistence expenses. Such arrangements should be clearly indicated on the Travel Authorization Form.

2. Expense Classifications of Travel

A. Consultant and Lecturer Travel -expense code 52021. This expense category is to be used for travel associated with a person providing consultation or guest lecture services for the University.

B. Student Travel - expense code 52022. This expense category is to be used for USC student travel.

C. Employment Interview Travel - expense code 52023. This expense category is to be used for travel associated with visitation of a potential employee. It should not be used for travel expenses incurred by University personnel in pursuit of prospective employees.

D. Professional Travel - expense code 52024. This expense category is to be used for all USC employee travel associated with 1) professional meetings, conventions or seminars; 2) negotiations on grants, contracts and other legal matters, and 3) other travel not specifically covered elsewhere.

E. Professional Travel Foreign - expense code 52025. This expense category is to be used for travel that is not within the United States, Canada or Puerto Rico.

3. Procedures for Travel Authorization

Individuals traveling on University business should do so only after prior submission of the Travel Authorization Form. All copies should be submitted through the appropriate official for approval. The routing of Travel Authorizations for domestic travel should generally be through the administrative office above the requesting unit.

Two signatures are required only if the department head is the traveler. Then the signature of his/her supervisor is also required. In the case of the Chancellor, travel is approved by the Vice President for Business and Finance.

After the Travel Authorization Form (TA) has proper approval it should be forwarded to the Business office. The Business Office will forward the TA to the Controller's Office in Columbia. If funds are not available in the account, the Authorization will be returned by the Business Office. If an individual travels on an account without sufficient funds, the University reserves the right not to reimburse the traveler expenses incurred. TA's should be submitted to the Business Office as early as possible, but always BEFORE the trip.

4. Method of Transportation

The method of transportation utilized by University employees will be the most practical and economical means, with due consideration given to the time involved and the mission to be accomplished. Travel under 500 miles round trip insofar as practical, shall be by University-owned or personal vehicle. Travel in excess of 500 miles round trip should be by air carrier because of the great savings in time over other types of conveyances. If time permits, travel over 500 miles round trip may be accomplished by private vehicle or University-owned vehicle. Use of University owned vehicles should be limited to South Carolina and adjoining states.

5. Repetitive Travel

Those individuals who do repetitive travel for a fixed period of time, (i.e., semester), should file a "blanket" Travel Authorization, including the estimated cost for the entire period. The Travel Reimbursement Voucher, under approved "blanket" Travel Authorizations, should be forwarded through the normal administrative channels. Blanket authorizations are good for no longer than the fiscal year.

6. Group Travel (Students)

More than one student may travel under one Travel Authorization. However, one person must be designated responsible for the funds. This person must account for all expenditures of the group and will be appropriately reimbursed. If such an arrangement is not desirable, a separate Travel Authorization must be submitted for each traveler.

7. Procurement of Airline Tickets

If an airline is to be used, the individual should contact Island Travel [(843)-525-0777]. Island Travel will directly bill USCB for the ticket; however the individual must submit the amount on a TA and will sign the TRV once the bill is received.

The individual must furnish the travel agent with the Travel Authorization number which is on the upper right corner of the Travel Authorization Form.

If you prefer, you may purchase your own airline ticket on-line using a personal credit card. For reimbursement, print an official itinerary/receipt that states traveler's name, amount of ticket and method of payment. Attach this itinerary/receipt to a completed TRV. for the amount of the ticket.

8. Reserving University Vehicles

If a USCB vehicle is to be used, the individual wishing to travel should reserve the car by

How to Reserve a State Vehicle

- A. Open Groupwise
- B. From the main Toolbar select New Appointment
- C. Fill in Place (where the traveler is going)
- D. Select the appropriate Start Date (or multiple dates)(date(s) you will need the vehicle), Start Time (time you wish to pick up the keys to the vehicle), and Duration (time you will return the keys to the vehicle).
- E. Fill in Subject: (Purpose of the trip)
- F. Any additional information relevant to the trip may be included in the message box.
- G. Select the Address option from the Toolbar of the current window (New Appointment). The Address Selector window will open. On the bar stating Address List there two rings/circles which represent the filter control for the address book. Click on the circles/rings to reveal the options. Click on Resources to select Resources. This will reduce the entries displayed to only Resources (All vehicles are setup as Resources in Groupwise – NOTE: Setting

the filter to reveal only Resources is not required but it may make it easier to locate the vehicles in the address list.). Either begin to type “Bft” or scroll down in address list until you come to the Resources which begin with “Bft” and double click on the vehicle you wish to reserve. Bft Do Van and Bft 01 Tar are vehicles located at North Campus. Bft 06 Van and Bft 99 Tar are vehicles located at South Campus. The TO box will indicate your name (the Groupwise account creating the appointment) and the selected vehicle. If you wish to change the appointment to reflect another user add that user name to the TO box as you would in addressing an email to multiple users. Each name in the TO box will receive the appointment message and it will appear on each user’s Groupwise calendar.

H. Then click Send.

I. You will receive a reply indicating acceptance of the scheduled appointment if the vehicle is available or declining the appointment if the vehicle is not available.

You may also check the schedule of the vehicle you are requesting prior to clicking Send on the appointment by using the Busy Search feature.

- a. Complete steps 1 through 8 as explained above.
- b. Select Busy Search from the toolbar of the current window (New Appointment)
- c. A window will open indicating all users and resources that have been selected to receive the appointment under the bar Invite to Meeting. Select the vehicle from the list and existing appointments will be reflected on the Individual Schedule Grid as gray boxes. See legend at the bottom of the current window). You may use the scroll bar at the bottom of the Individual Schedule Grid to view more the availability of additional days.

9. Use of Private Vehicle

Under varying circumstances it may be appropriate and desirable to use one's personal vehicle. This should be requested on the Travel Authorization form. Under no circumstances will the University reimburse for use of a personal car within ten miles of an employee's official headquarters and/or place of residence. When a private vehicle is used for service travel (i.e., supervision of clinicals, practicum’s or student teachers) the individual will be reimbursed only for mileage in excess of the distance between employee's residence and USCB.

10. General Rules for Reimbursement of Travel Expense

A. Maximum Reimbursement

State law provides that faculty and staff while traveling on the business of the University shall be allowed reimbursement for subsistence expenses incurred and paid. They shall, upon presentation of a paid receipt, be allowed reimbursement for actual

expenses incurred for lodging up to a maximum of \$300.00 per night. Lodging expenses should be reasonable taking into consideration location, purpose of travel, or other extenuating circumstances.

The employee shall also be reimbursed for the actual expenses incurred in obtaining meals except that such cost shall not exceed \$25.00 per day, except in areas outside of South Carolina maximum daily reimbursement for meals shall not exceed \$32.00.

B. Method of Determining Allowable Subsistence

1. Meals will be reimbursed on time of departure, and time of return up to a maximum allowance as follows:

<u>Departure Time</u>	<u>Return Time</u>	<u>Regular S.C.</u>	<u>Out of State</u>
Before 6:30 am	After 11:00 am	\$6.00	\$7.00
Before 11:00 am	After 1:30 pm	\$7.00	9.00
Before 5:15 pm	After 8:30 pm	\$12.00	\$16.00
		TOTAL \$25.00	\$32.00

Meals for one-day trips may be reimbursed within the allowances listed above, but this amount is considered income and will be listed on a year-end W-2. USC Beaufort does not allow meal payment for one day trips.

Foreign Travel-Meals:

If receipts are not provided, only the maximum daily rate for meals as established by the Federal Government for travel in foreign areas can be claimed.

*(Note: the rates listed on the websites below include an amount for **incidental charges**. This amount cannot be included in the meal reimbursement request. More explanation further in paragraph).*

To figure daily foreign meal rates, go to: <http://www.state.gov/m/a/als/prdm/2003/> Click on the most current year. Find the appropriate country (some countries have many regions). Go to column G, note the amount. Then go to <http://www.state.gov/m/a/als/prdm/651.htm>. The amount from column G, find in the "M&IE Rate" column--columns 2, 3, and 4 are the Breakfast, Lunch and dinner break downs for that country. Column 5 is the **incidental*** column mentioned above, and is not included in the daily meal amount. When claiming reimbursement for actual expenses of meals that exceeds the daily rate, receipts are required (there are limits) outlined on the non-Excel version of the first website mentioned above.

2. Lodging

Actual hotel/motel cost will be reimbursed not to exceed \$300.00 per day. No reimbursement for overnight accommodations will be made within fifty (50) miles of the traveler's official headquarters and/or place of residence.

Original itemized receipts for hotel or motel expenditures must be attached to the Travel Voucher when submitted for reimbursement and should show the applicable single room rate.

C. Transportation expense

Transportation will be paid in full at coach rates. However, if private vehicle is authorized, reimbursement will be at \$.30.5 per mile traveled or at coach airfare, whichever is less. The \$.30.5 per mile reimbursement includes all expenses of vehicle operation including insurance and repairs. This allowance will be increased to \$.34.5 per mile if documentation is submitted that a University vehicle was requested but was unavailable for the trip. Mileage is only reimbursed if the round trip is 20 miles or more.

D. Other Expenses

Other expenses may be reimbursed, such as conference or registration fees, taxi/limousine service, airport, parking and telephone. Receipts for these charges must be furnished. These reimbursements are in addition to the daily meals and lodging or subsistence amount. However, conference fees which include meals should have the meal allowance reduced by an appropriate amount. Gratuities are considered part of the meal cost.

Registration fees can be paid directly to the organization in advance by submitting a month ahead of the due date to allow for sufficient processing time by the Columbia travel department.

E. Dependents Accompanying Employee

If a dependent accompanies an employee on an authorized business trip, only those expenses which may be directly attributed to the employee may be reimbursed.

11. Changes in Approved Travel Plans

If travel plans are altered from those previously submitted and approved, or the funds need to be increased, a memo (or email from the appropriate person) revising the travel authorization should be forwarded to the Business Office. The same signatures as on the original TA are required. If the travel plans are canceled, likewise notify the Business Office in writing.

12. Travel and Subsistence Allowance for Students

Students traveling as official representatives of the University or sanctioned student organizations are subject to the same policies and procedures applicable to University staff. Reimbursement may range from token financial support up to the maximum travel and subsistence allowance applicable to regular official travel. The Vice Chancellor for Student Development or their designated representative must approve all student organization travel and make the determination as to method of travel and degree of financial support. Other official University student travel will be treated the same, as faculty and staff travel must be approved by the Division Head or Chancellor whose budget will be charged for the travel.