**GWS Department**

**Travel Guide**

**For all travel, please fill out an online travel form before making any travel arrangements.**

<http://staff.as.uky.edu/travel-form>

**TRAVEL**

**Responsibilities of the Traveler:**

1. Travel only when it is in the best interest of the University

2. Read and understand the University’s travel policies and procedures

3. Make all arrangements in accordance with University travel policy

4. If an alternate vendor is used for airfare, pay with personal funds and provide a valid cost comparison

5. If personal travel is included document the personal days, pay with personal funds and provide a valid airfare cost comparison for the business dates and destination(s)

6. Travel by most economical means feasible

7. Comply with the Fly America Act when traveling on federal grants

8. Request reimbursement only for necessary business expenses not previously paid with a procurement card; included in a registration fee; or reimbursed by a third party. Document third party payments.

9. Have a Motor Vehicle Record (MVR) Release and Information Form on file with the University’s Risk Management Department before driving a motor vehicle (personal, rental or motor pool) on University business

10. Retain original receipts, itineraries, and conference brochures or agendas to submit with your reimbursement request.

11. Submit all original receipts and required documentation immediately upon return from trip in order that there will be sufficient time for the IBU to process, obtain all approvals, and forward to Accounts Payable for their receipt within the 30-day time frame; note that signature of traveler may not be delegated

**Combining personal with business travel**

1. When combining personal with business travel, all travel expenses must be paid using personal funds, not with a procard or any other method using University funds; exceptions are:

1. Conference registration fees (when you register for a conference with the procard please forward the registration form or documentation from the website stating what is included in the cost of the registration fee to the IBU, Also, you must submit a conference schedule/agenda showing the dates of travel match the conference dates.)

1. In all cases that personal and business travel are combined and travel is by air, a valid cost comparison using the dates and destination(s) of the business side of the trip is required and reimbursement will be for the cheaper cost. Reimbursement will be given after the trip. Failure to run the cost comparison may result in no reimbursement. (Please see section on how to obtain a valid cost comparison). It is advisable to still use AAA/Cliqbook/Avant to book travel using personal credit card/funds. The cost comparison must be submitted with your reimbursement materials.
2. Any additional cost resulting from combining personal travel with business travel is the responsibility of the traveler and will not be reimbursed by the University.

**Travel -- Airfare**

* + UK’s approved vendor for airfare is AAA, which can be accessed through UK’s online reservation system, Concur. Please see UK’s travel site for information on using Concur, AAA, or Avant Travel: <http://www.uky.edu/Travel>. This site also has instructions for setting up a profile for first-time users.
	+ Travel receipts for travel purchased through Concur/AAA/Avant should be forwarded to KASfinance@uky.edu.
	+ Please note that airfare booked through an alternate vendor (Expedia, Travelocity, Delta, etc…) other than UK’s approved vendors **cannot be purchased with the procard**. However, you can buy your tickets through an alternate vendor with your personal credit card and then be reimbursed after you return from your trip. In order to be reimbursed, you must also provide a valid cost comparison showing that the alternate vendor was less expensive than UK travel. The print out MUST show the comparable rates of both vendors for the same date and same timeframe and should be printed out on the same date you book your alternative flight. Accounts payable will NOT reimburse unless this information is included. *(please see section about how to obtain a valid cost comparison below)*

**Travel -- Hotel**

* You can pay for lodging with a personal credit card and ask for reimbursement when you return from your trip. In order to be reimbursed, the IBU will need a copy of the **itemized** hotel bill that shows the date(s) of stay, the method of payment, and a zero balance.
* You can pay for lodging (for business purposes only) with the procard (instructions will be provided by the IBU after you fill out the online travel form). In order for the lodging to be charged to the procard at checkout, please call the hotel and ask them to fax a credit card authorization form to you before your trip and forward it to the IBU along with your your dates of stay, confirmation number, and whether you will need parking and/or internet so that the IBU can fill out the form. Only the room, tax, parking, and internet can be charged to the procard (any food or incidentals need to be charged to your personal credit card). Please submit the itemized receipt provided at checkout with your reimbursement materials.
* You can pay for lodging (for business purposes only) through a hotel that asks for immediate payment at the time of the reservation (Expedia, Hotels.com, etc…). Please refer to the IBU purchase instructions that you will receive after you fill out the online travel form.
* Cost for lodging may not exceed the cost of a single room rate.

**Travel -- Car**

*Before traveling by car for university business, regardless if a rental car, personal car, or University-owned vehicle (Motor Pool), you must have a Motor Vehicle Record (MVR) Release and Information Form on file with the University’s Risk Management Department.*

**University-Owned Vehicle**

* If you need to travel by car, the University prefers that you use a vehicle from the UK Motor Pool when available and feasible. You can submit a request online at [http://www.ca.uky.edu/mgmtops/vehicle\_reservations.asp or call 257-3119](http://www.ca.uky.edu/mgmtops/vehicle_reservations.asp%20or%20call%20257-3119). Before submitting a request, you will need to contact Michelle to find out the account number to charge, which is different depending on the type of funding you are using (dept travel, start-up, other) and also fill out the online travel form.

**Personal Car**

* When using a personal vehicle, the maximum reimbursement for all travel expenses will be calculated as follows:
	+ When the destination is less than 400 miles (one way) from the traveler’s workstation or residence, mileage, tolls, and subsistence only will be reimbursed. (i.e. no lodging)
	+ When the destination is 400 or more miles (one way) from the traveler’s workstation or residence, the maximum reimbursement, including mileage, tolls, lodging, and subsistence, is limited to no more than the normal expenses that would have been incurred if commercial air had been used.
* A valid cost comparison from Cliqbook must be submitted with your reimbursement materials *(see section on how to obtain a valid cost comparison)* showing that the cost of airfare is a higher rate than driving.
* The cost comparison should be obtained at the time airfare would normally have been booked, or at least three weeks prior to the date of the trip.

**Rental Car**

* If you choose to travel by rental car, you can rent a car with personal funds and submit the receipts for reimbursement along with a valid cost comparison showing that driving was less expensive than airfare (*see section on how to obtain a cost comparison*) You will need to submit the **itemized** rental car receipt that shows all charges. *Please note that insurance is not a reimbursable expense.*

**Travel - Reimbursements**

* + Travel expenses can only be reimbursed after you have returned from your trip. Accounts payable will not reimburse for travel expenses before the trip occurs.
	+ In order to be reimbursed you need to submit original, itemized receipts. Receipts should clearly show the amount and method of purchase. *In addition, please remember to submit conference brochures, agendas, and registration forms detailing the conference dates and what is included in the cost of the registration fee regardless of whether you are asking for reimbursement or have prepaid the registration fee on the procard.*
	+ You do not need receipts for subsistence since a per diem rate will be used instead for meals *(please note: subsistence cannot be claimed for meals included in registration fees even if you do not attend that conference meal)*.
	+ Miscellaneous travel expenses (transportation, baggage fees, etc…) over $10 need to be accompanied by a receipt in order to get full reimbursement. Without the receipt, you can only be reimbursed $10 for the expense regardless of the actual transaction cost.
	+ Please note that gasoline can only be reimbursed for rental cars. However, you can be reimbursed for mileage at the current rate per mile if you used a personal car. *Please remember that before traveling by car for university business, regardless if a rental car, personal car, or University-owned vehicle (Motor Pool), you must have a Motor Vehicle Record (MVR) Release and Information Form on file with the University’s Risk Management Department.*
	+ Please note: On occasion, accounts payable may ask for further documentation for purchases before they will reimburse. Most often we will need to have both an original receipt and a copy of the credit card or bank statement showing proof of the charges and payment. The credit/bank statements can be simple printouts from the bank/credit card website. You may cross out any other information that is not related to the specific charges to be reimbursed.

**How to obtain a valid Cost Comparison when (1) purchasing airfare through an alternate vendor or (2) choosing personal/rental car travel over airfare, (3) combining personal and business travel**

Although the University prefers that all business travel arrangements be made through UK Travel, travelers have the option of using an alternate vendor if the guidelines listed below are followed. You will also need a valid cost comparison for the business portion of your travel if (1) personal time is combined with business travel, (2) if you choose to travel by personal or rental car rather than airfare.

**Failure to submit a valid cost comparison will result in no reimbursement.**

* When purchasing airfare through an alternate vendor, remember it must be purchased using personal funds.
* For combined personal/business travel, the valid cost comparison should be completed using the business dates of travel only.
* For car travel instead of airfare, a valid cost comparison needs to show the comparable rate for the dates of car travel.
* The cost comparison must be the first page of available itineraries/airfares from Concur, which also shows the search parameters used and the airline matrix across the top of the screen.
* The cost comparison must be printed on the same day as the ticket is purchased, and must be date-stamped to show this. Cost comparisons used to substantiate car travel need to be obtained at the time airfare would normally have been booked, or at least three weeks prior to the date of the trip. It must show a listing of itineraries/airfares for the same dates of travel, the same travel destinations, and the same times of departure as shown on the ticket purchased from the alternate travel vendor.
* Print from your browser (do not use the print/email function on Concur) to include all information requested.
* If an air plus hotel or car "package" was purchased through an alternate vendor, then the appropriate cost comparisons for the air as well as the hotel or car must be secured from Concur.
* For multi-destination foreign travel, the valid cost comparison may be obtained from AAA or Avant Travel full service agents, as booking tools may not offer the best fares for these itineraries.
* The original ticket receipt showing the ticket number, date of issue, name of vendor, complete itinerary, form of payment, and amount of the charge, including service fees, is submitted for reimbursement after the trip is completed.
* Reimbursement of the alternate vendor’s service fees is limited to the service fees established by UK Travel: $9 for an online ticket; $29 for an agent-assisted domestic ticket; and $39 for an agent-assisted international ticket.
* For additional information regarding the use of alternate vendors, visit the Travel Management Services web site for alternate vendors at http://www.uky.edu/Travel/alternate.html.