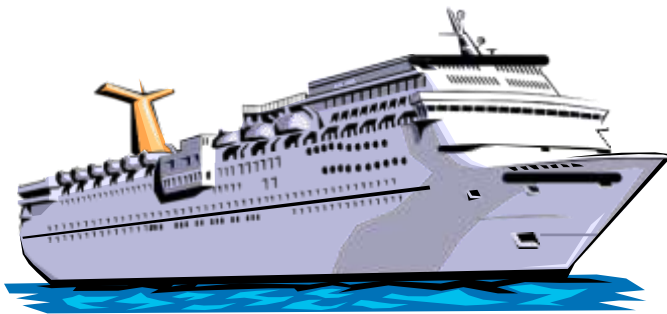




# UMBC

## TRAVEL POLICY AND PROCEDURES



UMBC #VIII-11.00.01

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**UMBC TRAVEL POLICY & PROCEDURES**

**UMBC Policy No. VIII-11.00.01**

This policy is written pursuant to the [University System of Maryland Board of Regents Policy VIII-11.00](#)

# Pre-approval



Pre-approval is required for the following types of travel:

- Out of state
- In state with overnight stay (includes Washington D. C.)
- Foreign

Approval must be complete prior to the commencement of the trip. This is necessary to ensure that the traveler is covered by Worker's Compensation benefits.

**Required form:** INDIVIDUAL REQUEST FOR TRAVEL.

Level of signature approval required:

- Out of state and in-state overnight travel: Department Head, Chairperson or the next higher authority above the traveler.
- Foreign travel: Same approvals as for out of state travel **PLUS** the Dean and the Vice President or Provost.
- Travel related to a grant or contract should also be reviewed by the appropriate persons to assure that the budget for the grant or contract is sufficient for the travel planned.

**Procedure:**

- Submit the original form to the approving authority who will forward it to [travel @umbc.edu](mailto:travel@umbc.edu).
- No tickets will be authorized, and no expense statements will be processed, unless the form is on file at the Travel Desk.

# Expense Reimbursements

**Required form:** UMBC EXPENSE STATEMENT.



Level of signature approval required:

- Out of state and in-state overnight travel: Traveler and the next higher authority above the traveler.
- Foreign travel: Traveler and the next higher authority above the traveler, plus the Dean or Vice President or the Provost.

## **Procedure:**

### **All travelers**

- Requests must be submitted to the Travel Desk within ten (10) business days following the conclusion of the trip.
- Please provide copy of approved E-Travel Request.
- Expenses for a trip that occurred in a prior fiscal year will not be permitted unless the trip terminates within the last ten days of that fiscal year and the expense report is submitted by July 10th of the next fiscal year.
- Start/end time of trip must be shown on the expense statement for first and last day of travel, and for all one-day trips.
- Include proper name, current address and social security number on the expense statement. Otherwise, documents will be returned.

### **Travelers with payroll Direct Deposit**

- Submit original and one copy of the form to the Travel Desk..
- Original receipts, plus one copy of each receipt, are required for all items over \$10.00 except as exempted on the Expense Statement Form. Undocumented expenses will be disallowed.
- All expenses will be reimbursed via Direct Deposit.

### **Travelers without payroll Direct Deposit**

- Submit original and one copy of the form to the Travel Desk.
- Original receipts, plus one copy of each receipt, are required for all items over \$10.00 except as exempted on the expense statement form Undocumented expenses will be disallowed.
- All expenses will be reimbursed on a State of Maryland check mailed to the address shown on the expense statement.



# Ticketing

- Travelers are expected to make their own travel arrangements.
- The UMS contracted travel agencies should be utilized whenever possible for airline, train or bus tickets as well as hotel accommodations and car rentals. These vendors have been selected through a competitive bid process. A current list of vendors is available from the Travel Desk.
- Advanced bookings should be made using the least expensive logical fare via the most direct route, or other reasonable routing that results in a lower fare.
- Travelers must use United States air carriers in compliance with the federal "Fly America Act" when flying on federal funds to foreign destinations unless otherwise directed by the federal sponsor.
- The cost of flight insurance is not reimbursable.
- If the traveler must change his plans for the convenience of the campus or if changes are the result of a personal emergency, the campus will pay any penalty fees incurred. (Reference UMS BOR policy VIII-11.00-1.2) Any change caused by a personal emergency requires a memorandum from the next higher authority and must be approved by the Dean or Vice President.

## **Procedure for USM Contracted travel agencies:**

- Contact the travel agent and book your flight(s).
- The travel agent will contact the UMBC Travel Desk and request an approval number for your booking.
- The Travel Desk will verify receipt of the E-TRAVEL REQUEST form for this trip. If no form is on file, the travel agent will be so notified and no approval will be given. Your booking will not be finalized. If the form is on file, the Travel Desk personnel will give an approval number to the travel agent and your booking will be finalized by the agent.

- The Travel Desk personnel are **not** responsible to notify the traveler or the department that approval is pending. It is the responsibility of the traveler or the department to ensure that the E-Travel form is submitted promptly to the Travel Desk.
- Approved paper tickets and receipts for e-tickets are delivered to the Travel Desk by the agencies.
- The traveler or his designee is responsible to pick up the ticket or receipt in person.
- **TICKETS ARE AVAILABLE FOR DISTRIBUTION MONDAY THROUGH FRIDAY FROM 9AM to 12 NOON and again from 2 PM TO 3:45 PM.**

#### **Procedure when other travel agencies are used:**

- Contact the travel agent, book your flight and pay for the ticket.
- Submit your payment receipt, which must show the cost and method of payment, on an Expense Statement at the conclusion of your trip.

**OR**

- Prepare a Requisition form showing the travel agency as the vendor.
- Submit the requisition form far enough in advance to permit processing by the procurement and accounting offices.

#### **Unused Tickets:**

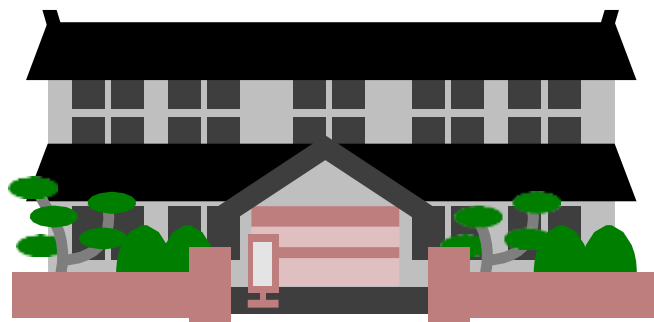
- Paper tickets that were picked up from the Travel Desk **MUST** be mailed to the Travel Agency for reimbursement.
- Failure to do so will result in the traveler being held responsible for the cost of the tickets.





# Hotel Reservations

- The State of Maryland Procurement card may be used for hotel reservations where accepted by the vendor. The cost of the room and applicable taxes are the only charges permitted on the card. Incidental charges must be paid by the traveler at check out and if business related, they should be substantiated on the Expense Statement for reimbursement. Non business expenses are the personal responsibility of the traveler (in room movies, personal toiletries, etc).
- Purchase Orders may also be issued when accepted by the vendor. The cost of the room and applicable taxes are the only charges permitted on the purchase order. See notes above.
- Travelers should identify themselves as UMBC employees when booking a room. UMBC travelers are entitled to all governmental discounts.
- Travelers are expected to pay the hotel bill at check out if neither of the above payment options are acceptable to the vendor. An original, *detailed* statement from the hotel *showing payment in full* is required for reimbursement on the Expense Statement. A charge card receipt, bank statement or credit card statement, is not detailed and therefore does not meet this requirement.
- Any increase in the base room rate and taxes that results from non-official travelers utilizing the accommodations is the personal financial responsibility of the traveler.



# Meals



## General

- Approving authorities are responsible to assure the appropriateness of meal expenditures in excess of per diem rates and are subject to audit scrutiny. Exceptions should not be routinely approved.
- The cost of alcoholic beverages can **NEVER** be reimbursed.
- **The cost of lunch may not be reimbursed unless the travel involved absence overnight or unless the traveler starts their travel more than two (2) hours prior to the traveler's normal starting time for work and/or extends more than two (2) hours after the traveler's normal quitting time. If the travel meets these two (2) requirements, then breakfast and dinner may also be reimbursed.**
- A partial day's travel **related to an overnight trip** (that is, the day you leave for an overnight trip or the day you return from an overnight trip) provides eligibility for certain meals depending on the start and end times of the travel. Departure from home at 6 AM or earlier on the first day of the trip entitles the traveler to all 3 meals. Likewise, arrival at home at 7 PM or later on the last day of the trip entitles the traveler to all 3 meals. Contact the Travel Desk for guidance on other partial day situations.
- Start/end time of trip must be shown on the expense statement for first and last day of travel, and for all one-day trips.

## Domestic Travel

- A per diem rate for each meal is published by UMBC based on the rate approved by the UMS Board of Regents each year.
- No receipt is required to receive the per diem for a meal.
- Meals may be reimbursed with an original, detailed receipt from the vendor in excess of per diem rate in exceptional cases, pursuant to limits imposed by the department and the availability of funds.



### **Domestic High-Cost Metro Areas**

- UMBC follows the Maryland Department of Budget and Management High-Cost Per Diem Schedule. To determine per diem reimbursement for high-cost metropolitan areas, please use the link below. Include a printed copy of the rates with your expense form.
  - [Domestic High-Cost Metropolitan Areas](#)
- Meals may be reimbursed with an original, detailed receipt from the vendor in excess of the high-cost per diem rate in exceptional cases, pursuant to limits imposed by the department and the availability of funds.

### **Foreign Travel**

- Meals are reimbursed without receipts at the current U. S. Department of State Meals and Incidental Expense per diem rate for the area visited. A current list of these rates is available by clicking [here](#).
- Meals may be reimbursed with an original, detailed receipt from the vendor in excess of the State Department MIE rates in exceptional cases pursuant to limits imposed by the department and the availability of funds.

# Travel by Car



## Use of State Owned Vehicles

- When availability permits, local travelers should use State owned vehicles. Contact Physical Plant to check availability.
- Traveler's driving record will be checked with the Motor Vehicle Administration for the number of points (if any) accumulated.
- Anyone whose record shows six or more points for moving violations will not be permitted to operate a state owned vehicle. This is required by State of Maryland vehicle fleet policy. Persons in this category will be reimbursed for the use of their personal vehicle at *one half the normal mileage reimbursement rate*.
- Anyone whose license has been suspended or revoked is prohibited from operating a state owned vehicle during the period such suspension or revocation is in effect.
- Any person operating a state owned vehicle must have a valid driver's license, comply with all traffic laws and obtain approvals as required by UMS or UMBC.
- Any traffic tickets issued to the driver of a state owned vehicle are the personal responsibility of the driver.



## Reimbursable Mileage

- Mileage for approved travel for UMBC business purposes will be reimbursed at the current rate. This rate is published each year and is available [here](#).
- A University employee who leaves the office, travels to a site, and returns to the office may be reimbursed for all mileage directly connected with the business trip (i.e., mileage from the office to the site and back to the office) because the driver will have driven the normal daily commute to and from the office by the end of the day.
- A University employee who leaves home to conduct business without stopping at the assigned office may be reimbursed for all mileage directly connected with the business trip that is in excess of the commute miles normally traveled (i.e., total official miles driven minus normal daily commute miles). In this situation, the driver has not driven the normal daily commute and therefore, must subtract the normal daily commute miles from the total official miles driven.

- A University employee who conducts University business prior to coming into the assigned office or on the way home from the assigned office may be reimbursed for all mileage in excess of the commute miles normally traveled.

### **Use of Employee's Personal Vehicle**

- All personal vehicles used for university business must be properly insured.
- If an auto insurance claim results from the use of a personal vehicle for travel related to university business, the driver's insurance is primary and must be used to its benefit limits to settle claims before State of Maryland insurance coverage may begin.
- Employees who use their personal vehicles for out of state travel will be reimbursed at amount not to exceed the cost of the least expensive airline ticket to that location.

### **Vehicle Rentals**

- For out of town travel, employees may rent a vehicle if necessary to meet business obligations on the trip. An original, detailed receipt showing payment in full is required for reimbursement. A bank statement or credit card statement is not detailed and therefore does not meet this requirement.
- Collision Damage Waiver (CDW) insurance:

Coverage is provided for employees of UMBC for rentals *within the U. S.* by the State Insurance Trust Fund. Employees should **not** sign a rental agreement within the U. S. that levies a fee for CDW coverage.

All 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.

- **Be sure the rental agreement includes the traveler's name, UMBC and the State of Maryland as the customer.**
- Rental discounts are available to all UMBC authorized travelers at the following rental agencies:

Avis A535800

Budget T586400

Enterprise W18490

# Travel by Private Airplane



- The pilot must be the traveler.
- UMBC faculty, staff and invited guests may use this form of transportation. No student on university travel may use a private airplane as a form of transportation under any circumstance.
- All pre-approval rules apply. Reference that section of the Travel Policy.
- The traveler/pilot must have an insurance policy with at least \$1,000,000 coverage per accident and at least \$300,000 coverage per person up to \$1,000,000 total for personal injury.
- The traveler/pilot must show proof that his insurance carrier has acknowledged that they have primary responsibility for payment of claims in case of a loss from university related travel.
- The traveler/pilot will be reimbursed for the calculated ground mileage from point to point, up to a maximum of 200 miles, at the current mileage reimbursement rate.
- If the calculated ground mileage exceeds 200 miles, the traveler/pilot will be reimbursed for the determined cost of a business coach commercial airline ticket for the trip (i.e.-what it would have cost if the traveler had flown to the same place from the same place on a commercial airliner).



# Travel Advances

- Advances are *not* made for routine business travel. Employees are expected to pay the basic trip expenses (lodging, ground transportation, meals, etc) with personal funds or personal credit card if the expense cannot be paid with the State Procurement Card or a Purchase Order.
- Employees who are required to travel, for business purposes, for a *continuous, extended period* of time are eligible to apply for a travel advance.
- Continuous extended travel is defined as continuous absence from home lasting at least ten (10) days.
- Documented business travel during at least 20 days of any 30-day consecutive period also makes an employee eligible for an advance.
- **Travel that does not meet these eligibility requirements will not be approved for an advance.**
- Eligibility for an advance does not guarantee approval since funding for advances is limited to current uncommitted monies in the campus working fund.
- Advances are issued on a first-come, first-served basis so the traveler is advised to submit the request at least 4 weeks in advance of departure date.

## **Procedure:**

- A separate policy for travel advances has been written. Complete procedure is detailed in this policy.

## **Required Form:** UMBC APPLICATION FOR TRAVEL ADVANCE

This form is available on the web at the same link referenced above. The form can also be obtained by calling the Working Fund Custodian.

# Recruiting, Interviewing or Hosting Guests of the University



## **Pre-Approvals:**

- Search committee chairperson (where applicable) must sign the E-Travel form.
- All other rules and procedures for employees apply. Refer to that section of the travel policy.

## **Expense Reimbursements:**

- Search committee chairperson (where applicable) must sign the expense statement.
- All other rules and procedures for travelers apply. Refer to that section of the travel policy.
- Athletics- When recruiting Student Athletes, reimbursement for the Student Athlete, the Student Athlete's parents or responsible parties and the UMBC coaches will be allowed per the current NCAA regulations. The Athletic Department's NCAA Compliance Coordinator will approve all reimbursement requests for expenses incurred during the recruiting process before they are submitted to the UMBC Business Services Travel Desk for payment.

## **Ticketing:**

- The UMBC host or recruiter is responsible to book transportation for the traveler and to submit required forms.
- The tickets may be delivered to the traveler's home airport if they so request.
- All other rules and procedures for employees apply. Refer to that section of the Travel Policy.

## **Hotel Reservations:**

- The UMBC host or recruiter is responsible to book lodging for the traveler and to submit required forms.
- All other rules and procedures for employees apply. Refer to that section of the Travel Policy.

### Meals:

- Dinner: The visitor and a maximum of two UMBC employees may be reimbursed at the current per diem rate.
- Lunch: The visitor's lunch may be reimbursed at the current per diem rate. No UMBC employees will be reimbursed for lunch during the work week.
- Breakfast: The visitor's breakfast may be reimbursed at the current per diem rate if an overnight stay is involved. No UMBC employees will be reimbursed for breakfast.
- All other rules and procedures for meals during domestic travel apply. Refer to that section of the Travel Policy.

### Vehicle Rentals

- Non-employees traveling for the university may rent a vehicle with prior approval and should obtain CDW coverage in *all rental agreements*. The traveler will be reimbursed for the cost of the CDW insurance.
- **Be sure the rental agreement includes the traveler's name, UMBC and the State of Maryland as the customer.**
- Rental discounts are available to all UMBC authorized travelers at many rental agencies. Contact the Travel Desk for a current list of agencies and their discount numbers.

### Use of personal vehicle

- Rules and procedures for employees apply. Refer to that section of the Travel Policy.

# Form Sources



**Forms referenced in this policy are listed below. Click on the form required.**

1. [E-Travel Request Form](#)

[http://www.umbc.edu/FinancialServices/Forms/Form doc/etravel request manual form](http://www.umbc.edu/FinancialServices/Forms/Form_doc/etravel_request_manual_form)

2. [Expense Statement](#)

<http://www.umbc.edu/accounting/PS Forms/new copy of expense statement>

3. [Application for Travel Advance](#)

<http://www.umbc.edu/accounting/PS Forms/umbc application for travel %20advance>



# Contact Information

Travel Desk: Located on the third floor of the Administration Building

Contact Number: (410) 455-2316

Peggy Ingle – Travel Coordinator [pingle@umbc.edu](mailto:pingle@umbc.edu)

Working Fund: Located on the third floor of the Administration Building.

Contact Number: (410) 455-2287

Linda Fleet – Working Fund Custodian [lfleet@umbc.edu](mailto:lfleet@umbc.edu)

Hours for both service areas: Monday – Friday from 9 AM to 12 Noon and again from 2 PM to 3:30PM



**Policy Number: VIII-11.00.01**

**Policy Section:**

**Responsible Administrator:**

**Responsible Office:**

**Approved by President:**

**Originally Issued:**

**Revision Date:**