### POLICY CONCEPT FORM

<table>
<thead>
<tr>
<th>Name and UO Title/Affiliation:</th>
<th>Kelly B. Wolf, AVP &amp; Controller</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy Title &amp; # (if applicable):</td>
<td>Travel Policy IV.04.02</td>
</tr>
<tr>
<td>Submitted on Behalf Of:</td>
<td>Business Affairs Office</td>
</tr>
<tr>
<td>Responsible Executive Officer:</td>
<td>Jamie Moffitt, VPFA</td>
</tr>
</tbody>
</table>

**SELECT ONE:**
- [ ] New Policy
- [x] Revision
- [ ] Repeal

*Click the box to select*

**HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT:**  
- [x] Yes
- [ ] No

*If yes, which attorney(s):* Craig Ashford

### GENERAL SUBJECT MATTER

*Include the policy name and number of any existing policies associated with this concept.*

The original Travel Policy hasn’t been amended or revised since its original adoption in March, 2017. The proposed revisions are the result of 3+ years of lessons learned under the original policy, cleanup of old language, actions related to the COVID-19 travel restrictions (primarily around duty-of-care), and recommendations from the Concur Service Advisory Board.

### RELATED STATUTES, REGULATIONS, POLICIES, ETC.

*List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary. Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.*

- [https://policies.uoregon.edu/vol-4-finance-administration-infrastructure/ch-4-business-affairs/university-fiscal-policy](https://policies.uoregon.edu/vol-4-finance-administration-infrastructure/ch-4-business-affairs/university-fiscal-policy)
- [https://policies.uoregon.edu/vol-4-finance-administration-infrastructure/ch-8-parking-vehicles/vehicles](https://policies.uoregon.edu/vol-4-finance-administration-infrastructure/ch-8-parking-vehicles/vehicles)
- [https://pages.uoregon.edu/baoforms/web/pdf/uo-departmental-fiscal-procedures.pdf](https://pages.uoregon.edu/baoforms/web/pdf/uo-departmental-fiscal-procedures.pdf)

### STATEMENT OF NEED

*What does this concept accomplish and why is it necessary?*
Highlights of the changes:

- **Added Guiding Principle:** All university travel will be conducted within the university’s managed travel program in order to provide duty-of-care for university travelers and to exercise appropriate stewardship of public funds.
- **Added language to post zero-cost travel in Concur** (to provide appropriate duty-of-care).
- **Expanded travel eligibility to current employees who are relocating for business purposes (i.e., moving from Eugene to Portland).**
- **Explicitly stated that airline travel will be purchased through the Concur Booking Tool or a contracted agent.** All other travel expenses can be either paid directly to a vendor or reimbursed to the traveler.
- **Explicitly stated that airfare purchased outside the travel program will not be reimbursed (without compelling business reason).**
- **Adjusted per-diem rules from IRS guidelines to GSA guidelines.**
- **Updated language related to business class tickets.**
- **Updated insurance language on personal and loaned/courtesy vehicles (in coordination with Flo H.).**
- **Updated language throughout to gender-inclusive pronouns.**

**AFFECTED PARTIES**

*Who is impacted by this change, and how?*

Applies to employees, students, board/committee members, prospective employees, volunteers, and independent contractors who travel on behalf of the university or on university business.

**CONSULTED STAKEHOLDERS**

*Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc.).)*

<table>
<thead>
<tr>
<th>Name</th>
<th>Office</th>
<th>Date</th>
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<tbody>
<tr>
<td>Concur Service Advisory Board</td>
<td></td>
<td>Apr, 2020</td>
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<tr>
<td>Jamie Moffitt</td>
<td>VPFA</td>
<td>Sep, 2020</td>
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<tr>
<td>Missy Matella</td>
<td>HR-ELR</td>
<td>Sep, 2020</td>
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<tr>
<td>United Academics (via HR-ELR)</td>
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<td>Nov, 2020</td>
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<tr>
<td>Academic Finance and Operations Team</td>
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<td>Chiefs of Staff</td>
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<td>Concur Processors</td>
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</table>
Reason for Policy
This policy provides guiding principles for university-related travel.

Entities Affected by this Policy
This policy applies to employees, students, board/committee members, prospective employees, volunteers, and independent contractors who travel on behalf of the university or on university business.

Web Site Address for this Policy
https://policies.uoregon.edu/vol-4-finance-administration-infrastructure/ch-4-business-affairs/travel-policy

Responsible Office
For questions about this policy, please contact the office the Travel/Concur office at travel@uoregon.edu or (541) 346-3100Vice President for Finance and Administration at (541) 346-3003.

Enactment & Revision History
[updated following enactment]
29 March 2017 - Approved by the university president

Policy
A. GUIDING PRINCIPLES

- Faculty, staff, and student travel is necessary to support and enhance the university’s mission
- Travelers are expected to be, and believed to be, reasonable and prudent utilizing university resources for travel
- Budget Authorities are accountable and responsible for appropriate use of university resources. Departments are free to create policies/limits that are more restrictive (but not less restrictive) than university-wide policies/limits
PROPOSED CHANGES

• All university travel will be conducted within the university’s managed travel program in order to inform university risk management functions and to exercise appropriate stewardship of public funds.
• University processes related to travel reimbursements should not be overly onerous so as to negatively affect travelers (including guests, visitors, recruits, etc.)
• Travel reimbursement processes should be clear, consistent, transparent, convenient, efficient, and compliant.
• Travel payments/reimbursements are for official business-related expenses only, not for personal expenses of the traveler or any traveling companions.

B. APPROVAL

All official, business-related university travel, even if the trip does not incur any costs to the university, will be requested and approved utilizing the university’s managed travel program. Travel expenses will be paid/reimbursed provided the trip and reimbursement request expense report are approved by authorized campus university personnel (generally the traveler’s supervisor or designee). Travel authorizations are processed through the university’s travel management software system. They may be oral or written. Blanket authorization for a series of trips may be approved. Employees whose duties require frequent or continuous travel are considered to have approval when travel is within the usual limits of their duties.

C. TAX TREATMENT

University payments/reimbursements are subject to tax or are tax-exempt depending on federal and state tax law. These laws are changed from time to time and those changes may affect the tax associated with any travel reimbursements.

The university pays/reimburses for travel expenses in accordance with federal tax standards for under an IRS Accountable Plan, so that employees are not subject to tax for university paid/reimbursed travel costs and in accordance with IRS Publication 463 (Travel, Entertainment, Gift, and Car Expenses) and IRS Publication 519 (U.S. Tax Guide for Aliens). These standards include the requirement that payment/reimbursement be limited to reasonable expenses and that the university receive an accounting of employee travel expenses be accounted for within a reasonable period of time after the expenses are incurred.

Payment/reimbursement of travel expenses for employees who are on temporary assignments (less than one year in duration) to work in another location are generally not taxable to the employee. However, if the assignment is indefinite, the employee is considered to have moved to the new work location. Payment/reimbursement of expenses for indefinite assignment to another location or indefinite travel is generally recorded as taxable to the employee.

D. PERSONS ELIGIBLE FOR TRAVEL-EXPENSE REIMBURSEMENT

(1) Employees
PROPOSED CHANGES

Reasonable travel expenses of University of Oregon employees may be paid/reimbursed when for expenses incurred in connection with official travel. Moving/relocation expenses of existing university employees, when that relocation is predicated upon a change in work location, may be paid/reimbursed as approved by the hiring authority and in accordance with the University Fiscal Policy.

(2) Employees on Leave
Reasonable travel expenses incurred during sabbatical leave may be paid/reimbursed when the travel was approved as official university travel by Academic Affairs as part of the application for sabbatical leave. Payment/reimbursement for travel expenses while on other types of leave is warranted only in exceptional circumstances.

(3) University of Oregon Board of Trustees Members and Unpaid Members of University Advisory Committees
Reasonable travel expenses of University of Oregon Board of Trustees members and unpaid members (non-university personnel) of university advisory committees may be paid/reimbursed using an actual-cost basis for actual and reasonable expenses, including mileage and gratuity.

(4) Prospective Employees
Reasonable travel expenses incurred in connection with prospective university employee interviews and recruitment are paid/reimbursed when properly authorized.

(5) New Employees
Moving/relocation expenses of new university employees may be paid/reimbursed for travel and moving expenses as approved by the hiring authority and in accordance with the University Fiscal Policy.

(6) Students
Reasonable travel expenses of students who travel as employees or on behalf of officially-designated representatives of the university may be paid/reimbursed for travel expenses.

(7) Non-Employees/Volunteer Workers/Independent Contractors
Official, business-related university travel expenses of individuals not listed above may only be paid/reimbursed for travel expenses incurred in conjunction with providing a service to the university campus through a formal or informal contractual relationship or who would otherwise perform services on the university’s behalf.

E. TRAVEL-EXPENSE PAYMENT

Airline travel will be purchased using the university’s travel management software system or through an approved and contracted Travel Management Company (TMC). Except for specific circumstances, payment for airline tickets will be made via the university lodge card, not as a reimbursement to the traveler. All other travel expenses may be paid either by reimbursement to the traveler or direct payment to a provider/merchant (e.g., airline ticket through a contract agency, direct billing from a hotel or rental car company).
Airfare booked/purchased outside of the travel management software system or a TMC will not be reimbursed unless there is a compelling business reason for the outside booking.

Requests to reimburse travel expenses and/or allocate prepaid travel expenses must be made via the travel management software system campus travel reimbursement process. Requests for reimbursement through the system must be accompanied by receipts, when required. Direct payments/reimbursements from the University of Oregon Foundation are subject to that organization’s policies and processes.

A corporate travel credit card is available for university business travelers subject to the employee’s agreement to comply with the university’s requirements and procedures. Travel advance funds may be requested from and approved (under limited circumstances) through the travel management software system by Business Affairs.

When employees travel together, it may be expedient for one employee to pay and claim reimbursement for certain expenses of other employees. Reimbursement for multiple employees is only allowed when actual expenses are being reimbursed and are supported by receipts. Deductions are made from the per diem amounts for employees involved.

F. STUDENTS, STUDENT GROUPS, AND TEAMS

(1) Student Travel

The university’s Policy on Vehicles Traffic, Parking and Vehicle Safety (former OAR 580-40-0030) provides guidelines regarding transportation of students in a state owned, leased or controlled vehicle.

(2) Travel Expenses of Others

A university employee, such as a coach, athletic director, or group leader, may pay for the travel expenses of the team or group members. However, the employee may only pay for university students or university-affiliated group members. Refer to travel procedures for documentation requirements.

(3) One-Day Trips

Meal expenses for an athletic team or student group on a one-day trip may be reimbursed at actual cost (as opposed to per diem). An itemized receipt is required. University employees such as coaches, trainers, or group leaders who accompany and are responsible for the care, custody, or control of the team or group are also eligible for meal-expense reimbursement. The request for reimbursement must state that the expenses result from a trip by an athletic team or student group.

G. TRAVEL PAID BY OUTSIDE SOURCE

If permitted under federal and state law, university policies governing employee ethics, and other applicable restrictions, outside entities may reimburse the campus university, pay a service provider directly, or reimburse a university employee for travel expenses related to university business. The university will not pay or reimburse for any travel expenses that are also being paid by an outside source directly to the university employee.
H. MEAL AND INCIDENTAL EXPENSES

(1) General
Generally, meal and incidental expenses are reimbursed at a per diem rate. Meal and incidental expenses may be reimbursed only if the traveler qualifies for lodging-expense reimbursement, except as noted herein.

Travelers are eligible for 75% of the meal and incidental expenses per diem amount on the initial and final day of travel. Travelers are eligible for 100% of the meal and incidental expenses per diem on all other travel days.

For the day the traveler leaves on a trip, the per diem rate specified for where the traveler will conduct the majority of their business and spend the night is used. For the day the traveler returns from a trip, the per diem rate specified for the last location where the traveler conducted business and stayed overnight is used.

(2) Travel Days
Travelers are eligible for 75% of the meal and incidental expenses per diem amount on the initial and final day of travel.

(3) Hosted Meals
Applicable meal and incidental expense per diem will be reduced on a pro-rata basis for days when one or more meals are provided and consumed may not be claimed if a meal is provided and consumed as part of a hosted function (e.g., a conference registration fee includes a meal, meals are included with lodging rate), or included with a roomette/bedroom railroad rate or international flight. Meal per diem is pro-rated based upon the applicable rate table. Incidental expense per diem is paid at 100% even if the meal per diem is apportioned. The per diem rate for a full day’s meal and incidental expenses is apportioned as follows:

- breakfast: 25%
- lunch: 25%
- dinner: 50%

Meal and incidental expense per diem is not pro-rated apportioned for the initial and final day of travel (even if a meal is provided and consumed).

(4) Actual Meal-Expense Reimbursement
Reimbursement for meals at actual expense (including gratuity) instead of per diem rate is allowed when hosting official guests and groups and in other circumstances noted herein (See departmental fiscal procedures) Fiscal Policy 56.100 – Non-Travel Meals, Refreshments, and Hospitality Expenses.

(5) Meals on One-Day Trips
When an employee departs and returns the same day, meal expenses are reimbursed only in the following cases:
(a) When traveling as a University of Oregon Board of Trustees member or unpaid member of a university advisory committee

(b) When a meal at a convention, conference, or meeting is part of the agenda and the cost of the meal has not previously been paid with the registration fee

(c) When directed or required to attend mealtime business meetings, including community or public relations meetings

(d) Trips by athletic teams and student groups (see STUDENTS, STUDENT GROUPS, AND TEAMS, above)

Lunches on one-day trips will not be reimbursed except in circumstances H.5(a)-H.5(d), listed above.

In addition to H.5(a)-H.5(d) above, the university may provide breakfast and dinner allowances under circumstances (e) and (f) below. However, The IRS Internal Revenue Service (IRS) requires considers breakfast and dinner allowances, figured provided on the basis of hours worked (such as those permitted under (e) and (f) below, to be recorded as taxable income to the employee. Breakfast and dinner allowances are not available to non-employees.

(e) When an employee leaves his/her official station two or more hours before his/her regular work shift, they are eligible for the breakfast allowance.

(f) When an employee returns to his/her official station two or more hours after his/her regular work shift, they are eligible for the dinner allowance.

[46] Incidental Expenses
Incidental Expenses are combined with meals into a single rate.

The university uses IRS guidance references IRS (Publication 463 (Travel, Entertainment, Gift, and Car Expenses) or any substitute guidance) for the definition of domestic-travel incidental expenses and the U.S. Department of State guidance for the definition of foreign-travel incidental expenses.

I. LODGING

Lodging expenses are normally permitted reimbursed when authorized campus university personnel determine that the traveler would not reasonably be expected to return to his/her residence between work shifts. Generally, lodging is paid/reimbursed at actual cost up to per diem rates. Exceptions to per diem maximum may be granted with appropriate justification and supervisor approval. Common exceptions include:

- Conferences
- Traditionally high-cost locations (e.g., New York City; Washington, DC; San Francisco Bay Area; Boston; Seattle)
• Cities where a per diem hotel is not available within a reasonable distance [e.g., twenty (20) 
minute drive] of the primary business location

(1) Lodging Receipts Requirements
Receipts for lodging are required and must show the following:
• Traveler’s name (or names)
• Date(s) occupied
• Itemization of Charges
• Settlement in Full

(2) Taxes on Lodging
Lodging taxes at domestic locations are paid/reimbursed as part of the actual lodging cost calculation, 
but are not included when determining if lodging cost has exceeded the per diem rate maximum. 
Lodging taxes at international locations are included as part of the per diem.

(3) Non-commercial Lodging
The intent of the non-commercial lodging per diem is to reimburse travelers using non-commercial 
facilities (e.g., travel trailer, motor home, or staying with friends or family members) and should result in 
an economic benefit for the university. For current rate, see related resources [Link to per diem rates]

For purposes of payment/reimbursement rates and per diem limits, lodging arranged through 
commercial services such as Airbnb is considered Commercial Lodging.

In certain circumstances, alternate lodging arrangements (e.g., leased apartment) may be considered 
most appropriate. Contact the BAO Travel Office for additional information and consideration.

J. TRANSPORTATION
Transportation expenses incurred while traveling on official business may be paid/reimbursed. Personal 
expenses, such as an employee’s personal vehicle repair and maintenance, may not. The 
following expenses may be reimbursed or paid directly (per guidelines below):
• Common carrier fare
• Rental vehicle charges
• Private-vehicle mileage allowance
• Taxi or shuttle service fare (including gratuity)
• Parking and garage fees

K. COMMON CARRIER FARES
Transportation by common carrier (e.g., airline, railroad, bus) is recommended when it is more 
appropriate and economical than travel by state or private vehicle. Common carriers are usually 
preferred for out-of-state travel. Actual cost is paid or reimbursed for airline, railroad, and bus fares for 
travel. See TRAVEL-EXPENSE PAYMENT (above) for specific Policy guidance related to airline travel.

(1) Airlines
All employees are encouraged to travel using routes, schedules, and airlines that provide the most cost-effective, efficient travel that meets the business purpose. Economy Plus and/or Business Class airfare are authorized international flights where the elapsed time in-the-air for any single segment/leg/portion of the overall flight is eight hours or greater for any leg of international flights where the elapsed time in-the-air is eight hours or greater. First Class airfare is not authorized. Air travel paid from federal funds must conform to the Fly America Act.

(2) Taxis and Shuttle Services
Taxi and shuttle service is authorized between terminals, lodgings, and work stations.

(3) Railroads
All employees are encouraged to travel using routes and schedules that provide the most cost-effective, efficient travel that meets the business purpose. A roomette is allowed when sleeping accommodations are needed due to overnight travel. A bedroom is allowed if no roomette is available or if special accommodations are approved because of the trip’s nature or the traveler’s employee’s health. Applicable meal and incidental expense per diem may not be claimed on a pro-rata basis if a meal is provided and consumed as part of the roomette or bedroom rate.

(4) Bus Lines
Scheduled or charter buses may be used.

(5) Travel Awards and Frequent Flyer Mileage
Because the cost of record-keeping outweighs any monetary benefit, the university does not require employees to utilize airline bonuses awarded employees for and/or frequent flyer miles earned from university-paid travel for university purposes. Frequent flyer bonuses may be used by employees as they choose unless the terms of a grant or contract require otherwise. The university will not reimburse or trade tickets purchased using frequent flyer miles.

(6) Payment in Lieu of Air Travel
Common carriers (e.g., airlines, railroads) are usually preferred for out-of-state travel. A traveler may choose to travel by private vehicle instead. In such a case, the employee-traveler may be reimbursed for ground transportation expenses, including standard mileage, parking, and tolls, up to the cost that would have been incurred had they/traveled by common carrier.

The following costs associated with air travel can be used as a basis for comparison:

- The cost of round-trip commercial air fare that would have been incurred. An online quote (i.e., Travelocity, Orbitz) from the university’s managed travel software system should be obtained prior to the travel dates.
- Private vehicle mileage to and from the air terminal that would normally be used for departure.
- Lodging, meal, and incidental expenses that the employee would normally incur with air travel.

L. PRIVATE VEHICLES

Private vehicles may be utilized for business-related travel.
Employees and agents authorized to use their privately-owned vehicles for official business are required to have personal automobile liability insurance to provide the primary coverage for any accidents involving that vehicle. University-provided automobile liability coverage will apply on a limited basis after the employee's primary coverage limits have been exhausted. For additional information, contact Safety and Risk Services.

The university's Policy on Vehicles provides guidelines regarding driver and vehicle qualifications.

The per-mile reimbursement rate is determined by the Internal Revenue Service (IRS). Employees who receive a Car Allowance Stipend are not eligible for per-mile reimbursement.

Mileage for the most direct, usually-traveled route may be reimbursed. The university reimburses for use of a private vehicle at the pre-established rate regardless of the number of passengers in the vehicle.

Use standard mileage guides, odometer/tripometer readings, or online mapping tools (e.g., Mapquest.com). Substantial deviations from standard distances or usual routes must be justified. Mileage calculations generally start at the employee's official work station.

Travel between work places and travel between lodging and restaurants for a traveler's sustenance, health, and comfort may be reimbursed if meals cannot be obtained at the temporary duty or lodging sites. Travel for personal reasons or entertainment may not be reimbursed.

Travel between the employee's home and official work station is a personal considered commuting expense and may not be reimbursed.

Employees and agents authorized to use their privately owned vehicles for official business are required to have personal automobile liability insurance to provide the primary coverage for any accidents involving that vehicle. University-provided automobile liability coverage will apply on a limited basis after the employee's primary coverage limits have been exhausted. The university does not provide physical damage, uninsured motorist and personal injury protection for personal vehicles. For additional information, contact the Office of Risk Management.

M. VEHICLE RENTAL

Vehicle rental expenses for official university travel may be paid/reimbursed. A car, boat, aircraft or other vehicle may be rented when it is the most cost-effective, efficient means of transportation that meets the business purpose. Receipts are required for vehicle rentals. Employees are encouraged to utilize University of Oregon or State of Oregon contracts which provide rental discount rates, car upgrades, and insurance coverage. Employees are also encouraged to use their corporate travel cards when renting vehicles because of the primary Collision Damage Waiver (CDW) coverage provided.

(1) Insurance on Rented Vehicles
The university provides and maintains self-insurance coverage for rental vehicles if they are to be used exclusively for official university business. A certificate of insurance may be obtained from the Office of Risk Management.

If a rental vehicle is to be used for a mix of personal and business purposes, the university's self-insurance coverage is only applicable for the portion of travel applicable to official business. The employee or agent will want to check with their/their insurance agent regarding coverage for personal usage.

If the employee or agent plans to travel outside the United States, its territories and possessions, and Canada, the department should contact the Office of Risk Management for help in obtaining the appropriate coverage.

(2) Responsibilities After an Accident
The renter of a vehicle involved in an accident is responsible for immediately reporting the accident to the Office of Risk Management.

N. LOANED/COURTESY VEHICLES

If permitted under federal and state law, university policies governing employee ethics, and other applicable restrictions, the use of loaned/courtesy vehicles may be authorized when it benefits the university. Expense reimbursement is for use of the vehicle regardless of the number of passengers. Some companies may lend vehicles to the university, departments, or individual employees for specified purposes. The operator is reimbursed for actual out-of-pocket expenses arising from using the vehicle for official business. The university reimburses for use of vehicles without regard to the number of passengers in the vehicle. The university will not pay or reimburse an employee for any vehicle expenses that are also being paid by an outside source directly to the university employee.

(1) Insurance on Loaned/Courtesy Vehicles
Employees and agents authorized to use loaned/courtesy vehicles for official business are required to have personal automobile liability insurance to provide the primary coverage for any accidents involving that vehicle. University-provided automobile liability coverage may apply on a limited basis after the employee’s primary coverage limits have been exhausted. For additional information, contact the Office of Risk Management. The university’s Policy on Vehicles provides guidelines regarding driver and vehicle qualifications.

The university provides coverage for loaned vehicles if the campus has agreed in writing to accept responsibility for any liability or damage to the vehicle. The loaned vehicle must be used for official business.

For additional information, including the loan agreement form, contact the Office of Risk Management.

O. MOTOR POOL AND UNIVERSITY-OWNED VEHICLES

Motor pool and university-owned vehicles may be used for official university business only. Use of a state motor pool or university-owned vehicle is not authorized when costs are charged to Agency...
Funds, except for use by university Campus Organizations or for other legitimate state business purposes as approved by authorized campus university personnel. The department that authorizes a state motor pool or university-owned vehicle’s use by an employee or student is financially accountable for damages and all costs resulting from violations of policies relating to use of the motor pool or university-owned state vehicle.

(1) Private Use Prohibited
Using a motor pool or university-owned vehicle for personal purposes or allowing another person to do so is prohibited (ORS 283.395) and punishable, upon conviction, by a fine (ORS 283.990).

(2) Vehicle Safety Including Authorized Drivers
The university’s Policy on Traffic, Parking and Vehicles Safety (former OAR 580-40-0030) provides safety guidelines regarding transportation in a motor pool or university-owned, leased, or controlled vehicle.

(3) Overnight Parking at Employee’s Residence
A motor pool or university-owned state vehicle may be kept overnight at an employee’s residence when doing so is approved in advance by authorized campus university personnel.

P. MISCELLANEOUS EXPENSES

The university pays/reimburses authorized miscellaneous Necessary business-related travel expenses normally reimbursed. The university maintains a list of miscellaneous travel Personal expenses which may not be authorized for payment/reimbursement are not reimbursed. The university establishes the definition of miscellaneous expenses. All miscellaneous expenses must be itemized.

Necessary Authorized miscellaneous business-related travel expenses are not paid/reimbursed using a per diem funds; rather, if the traveler has incurred a miscellaneous business travel expense as outlined below, that expense is payable/reimbursable at the actual cost.

(1) Checked Baggage
Up to two (2) standard-weight bags (standard weight as defined by the airline used). Charges for the following may be paid/reimbursed only when necessary for the business purpose and approved by authorized institution university personnel (receipts required):
- additional baggage (more than 2 bags)
- overweight/oversize baggage

(2) Other Business-Related Travel Expenses That May Be Authorized for Payment/Reimbursement Normally Reimbursed
- Telephone
- Fax
- Internet
- Postage
- Printing and mailing services
• ATM cash advance fees
• Materials and supplies purchased to meet an immediate business need
• Visa and passport expenses
• Vaccinations or medications required for foreign travel (if not paid/reimbursed through health insurance coverage)
• Parking
• Tolls
  - Energy surcharge

Q. PER DIEM RATE REFERENCES

Per diem rates for the continental United States are determined by the US General Services Administration using the federal rate in the IRS's High-Low Substantiation Method. Per diem rates for the non-continental United States and Territories (e.g., Alaska, Hawaii, Guam, Puerto Rico) are determined by the US Department of Defense. Per diem rates for foreign locations are determined by the US Department of State.

R. EXCEPTIONS

Upon consideration of documented extenuating circumstances, exceptions to these policy provisions may be granted by the Vice President for Finance and Administration or designee.

Related Resources

Concur Login and Resources
International Travel Registration and Insurance Cards
Lodging & Meal Reimbursement Rates
University Fiscal Policy
University Policy on Vehicles
Reason for Policy
This policy provides guiding principles for university-related travel.

Entities Affected by this Policy
This policy applies to employees, students, board/committee members, prospective employees, volunteers, and independent contractors who travel on behalf of the university or on university business.

Web Site Address for this Policy
https://policies.uoregon.edu/vol-4-finance-administration-infrastructure/ch-4-business-affairs/travel-policy

Responsible Office
For questions about this policy, please contact the office the Travel/Concur office at travel@uoregon.edu or (541) 346-3100.

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C. TAX TREATMENT

University payments/reimbursements are subject to tax or are tax-exempt depending on federal and state tax law. These laws are changed from time to time and those changes may affect the tax associated with any travel reimbursements.

The university pays/reimburses for travel expenses in accordance with federal tax standards for Accountable Plans so that employees are not subject to tax for university paid/reimbursed travel costs. These standards include the legal requirement that payment/reimbursement be limited to reasonable expenses and that the university receive an accounting of employee travel expenses within a reasonable period of time after the expenses are incurred.

Payment/reimbursement of travel expenses for employees who are on temporary assignments (less than one year in duration) to work in another location are generally not taxable to the employee. However, if the assignment is indefinite, the employee is considered to have moved to the new work location. Payment/reimbursement of expenses for indefinite assignment to another location or indefinite travel is generally recorded as taxable to the employee.

D. PERSONS ELIGIBLE FOR TRAVEL-EXPENSE REIMBURSEMENT

(1) Employees
Reasonable travel expenses of University of Oregon employees may be paid/reimbursed when incurred in connection with official travel. Moving/relocation expenses of existing university employees, when that relocation is predicated upon a change in work location, may be paid/reimbursed as approved by the hiring authority and in accordance with the University Fiscal Policy.

(2) Employees on Leave
Reasonable travel expenses incurred during sabbatical leave may be paid/reimbursed when the travel was approved as official university travel as part of the application for sabbatical leave. Payment/reimbursement for travel expenses while on other types of leave is warranted only in exceptional circumstances.

(3) University of Oregon Board of Trustees Members and Unpaid Members of University Advisory Committees
Reasonable travel expenses of University of Oregon Board of Trustees members and unpaid members (non-university personnel) of university advisory committees may be paid/reimbursed using an actual-cost basis, including mileage and gratuities.

(4) Prospective Employees
Reasonable travel expenses incurred in connection with prospective university employee interviews and recruitment are paid/reimbursed when properly authorized.

(5) New Employees
Moving/relocation expenses of new university employees may be paid/reimbursed as approved by the hiring authority and in accordance with the University Fiscal Policy.

(6) Students
Reasonable travel expenses of students who travel as employees or on behalf of the university may be paid/reimbursed.

(7) Non-Employees/Volunteer Workers/Independent Contractors
Official, business-related university travel expenses of individuals not listed above may only be paid/reimbursed in conjunction with providing a service to the university through a contractual relationship or who would otherwise perform services on the university’s behalf.

E. TRAVEL-EXPENSE PAYMENT

Airline travel will be purchased using the university’s travel management software system or through an approved and contracted Travel Management Company (TMC). Except for specific circumstances, payment for airline tickets will be made via the university lodge card, not as a reimbursement to the traveler. All other travel expenses may be paid either by reimbursement to the traveler or direct payment to a provider/merchant (e.g., direct billing from a hotel or rental car company).

Airfare booked/purchased outside of the travel management software system or a TMC will not be reimbursed unless there is a compelling business reason for the outside booking.

Requests to reimburse travel expenses and/or allocate prepaid travel expenses must be made via the travel management software system. Requests for reimbursement through the system must be accompanied by receipts, when required. Direct payments/reimbursements from the University of Oregon Foundation are subject to that organization’s policies and processes.
A corporate travel credit card is available for university business travelers subject to the employee’s agreement to comply with the university’s requirements and procedures. Travel advance funds may be requested and approved (under limited circumstances) through the travel management software system.

F. STUDENTS, STUDENT GROUPS, AND TEAMS

(1) Student Travel
The university’s Policy on Vehicles provides guidelines regarding transportation of students in a state owned, leased or controlled vehicle.

(2) Travel Expenses of Others
A university employee, such as a coach, athletic director, or group leader, may pay for the travel expenses of the team or group members. However, the employee may only pay for university students or university-affiliated group members. Refer to travel procedures for documentation requirements.

(3) One-Day Trips
Meal expenses for an athletic team or student group on a one-day trip may be reimbursed at actual cost (as opposed to per diem). An itemized receipt is required. University employees such as coaches, trainers, or group leaders who accompany and are responsible for the care, custody, or control of the team or group are also eligible for meal-expense reimbursement. The request for reimbursement must state that the expenses result from a trip by an athletic team or student group.

G. TRAVEL PAID BY OUTSIDE SOURCE

If permitted under federal and state law, university policies governing employee ethics, and other applicable restrictions, outside entities may reimburse the university, pay a service provider directly, or reimburse a university employee for travel expenses related to university business. The university will not pay or reimburse for any travel expenses that are also being paid by an outside source directly to the university employee.

H. MEAL AND INCIDENTAL EXPENSES

(1) General
Generally, meal and incidental expenses are reimbursed at a per diem rate. Meal and incidental expenses may be reimbursed only if the traveler qualifies for lodging-expense reimbursement, except as noted herein.

For the day the traveler leaves on a trip, the per diem rate specified for where the traveler will conduct the majority of their business is used. For the day the traveler returns from a trip, the per diem rate specified for the last location where the traveler conducted business is used.

(2) Travel Days
Travelers are eligible for 75% of the meal and incidental expenses per diem amount on the initial and final day of travel.

(3) Hosted Meals
Applicable meal and incidental expense per diem will be reduced on a pro-rata basis for days when one or more meals are provided and consumed as part of a hosted function (e.g., a conference registration fee includes a meal, meals are included with lodging rate). Meal per diem is pro-rated based upon the applicable rate table. Incidental expense per diem is paid at 100% even if the meal per diem is apportioned.

Meal and incidental expense per diem is not pro-rated for the initial and final day of travel (even if a meal is provided and consumed).

(4) Actual Meal-Expense Reimbursement
Reimbursement for meals at actual expense (including gratuity) instead of per diem rate is allowed when hosting official guests and groups and in other circumstances noted herein (see departmental fiscal procedures).

(5) Meals on One-Day Trips
When an employee departs and returns the same day, meal expenses are reimbursed only in the following cases:

(a) When traveling as a University of Oregon Board of Trustees member or unpaid member of a university advisory committee

(b) When a meal at a convention, conference, or meeting is part of the agenda and the cost of the meal has not previously been paid with the registration fee

(c) When directed or required to attend mealtime business meetings, including community or public relations meetings

(d) Trips by athletic teams and student groups (see STUDENTS, STUDENT GROUPS, AND TEAMS, above)

Lunches on one-day trips will not be reimbursed except in circumstances H.5(a)-H.5(d), listed above.

In addition to H.5(a)-H.5(d) above, the university may provide breakfast and dinner allowances under circumstances (e) and (f) below. However, the Internal Revenue Service (IRS) requires breakfast and dinner allowances, provided on the basis of hours worked (such as those permitted under (e) and (f) below, to be recorded as taxable income to the employee. Breakfast and dinner allowances are not available to non-employees.

(e) When an employee leaves their official station two or more hours before their regular work shift, they are eligible for the breakfast allowance.
(f) When an employee returns to their official station two or more hours after their regular work shift, they are eligible for the dinner allowance.

[6] Incidental Expenses

The university uses IRS guidance (Publication 463 (Travel, Entertainment, Gift, and Car Expenses) or any substitute guidance) for the definition of domestic-travel incidental expenses and the U.S. Department of State guidance for the definition of foreign-travel incidental expenses.

I. LODGING

Lodging expenses are normally permitted when authorized university personnel determine that the traveler would not reasonably be expected to return to their residence between work shifts. Generally, lodging is paid/reimbursed at actual cost up to per diem rates. Exceptions to per diem maximum may be granted with appropriate justification and supervisor approval. Common exceptions include:

- Conferences
- Traditionally high-cost locations (e.g., New York City; Washington, DC; San Francisco Bay Area; Boston; Seattle)
- Cities where a per diem hotel is not available within a reasonable distance [e.g., twenty (20) minute drive] of the primary business location

1. Lodging Receipts Requirements

Receipts for lodging are required and must show the following:

- Traveler's name (or names)
- Date(s) occupied
- Itemization of Charges
- Settlement in Full

2. Taxes on Lodging

Lodging taxes at domestic locations are paid/reimbursed as part of the actual lodging cost calculation, but are not included when determining if lodging cost has exceeded the per diem rate maximum. Lodging taxes at international locations are included as part of the per diem.

3. Non-commercial Lodging

The intent of the non-commercial lodging per diem is to reimburse travelers using non-commercial facilities (e.g., travel trailer, motor home, staying with friends or family members) and should result in an economic benefit for the university. For current rate, see related resources.

For purposes of payment/reimbursement rates and per diem limits, lodging arranged through commercial services such as Airbnb is considered Commercial Lodging.

In certain circumstances, alternate lodging arrangements (e.g., leased apartment) may be considered most appropriate. Contact the BAO Travel Office for additional information and consideration.
J. TRANSPORTATION

Transportation expenses incurred while traveling on official business may be paid/reimbursed. Personal expenses, such as an employee’s personal vehicle repair and maintenance, may not. The following expenses may be reimbursed or paid directly (per guidelines below):

- Common carrier fare
- Rental vehicle charges
- Private-vehicle mileage allowance
- Taxi or shuttle service fare (including gratuity)
- Parking and garage fees

K. COMMON CARRIER FARES

Transportation by common carrier (e.g., airline, railroad, bus) is recommended when it is more appropriate and economical than travel by state or private vehicle. Common carriers are usually preferred for out-of-state travel. Actual cost is paid/reimbursed for airline, railroad, and bus fares for travel. See TRAVEL-EXPENSE PAYMENT (above) for specific Policy guidance related to airline travel.

(1) Airlines
All employees are encouraged to travel using routes, schedules, and airlines that provide the most cost-effective, efficient travel that meets the business purpose. Economy Plus and/or Business Class airfare are authorized international flights where the elapsed time in-the-air for any single segment/leg/portion of the overall flight is eight hours or greater. First Class airfare is not authorized. Air travel paid from federal funds must conform to the Fly America Act.

(2) Taxis and Shuttle Services
Taxi and shuttle service is authorized between terminals, lodgings, and work stations.

(3) Railroads
All employees are encouraged to travel using routes and schedules that provide the most cost-effective, efficient travel that meets the business purpose. A roomette is allowed when sleeping accommodations are needed due to overnight travel. A bedroom is allowed if no roomette is available or if special accommodations are approved because of the trip's nature or the employee’s health. Applicable meal and incidental expense per diem may be reduced on a pro-rata basis if a meal is provided and consumed as part of the roomette or bedroom rate.

(4) Bus Lines
Scheduled or charter buses may be used.

(5) Travel Awards and Frequent Flyer Mileage
Because the cost of record-keeping outweighs any monetary benefit, the university does not require employees to utilize airline bonuses and/or frequent flyer miles earned from university-paid travel for university purposes. Frequent flyer bonuses may be used by employees as they choose unless the terms
of a grant or contract used to pay for the travel require otherwise. The university will not reimburse or trade tickets purchased using frequent flyer miles.

(6) Payment in Lieu of Air Travel
Common carriers (e.g., airlines, railroads) are usually preferred for out-of-state travel. A traveler may choose to travel by private vehicle instead. In such a case, the traveler may be reimbursed for ground transportation expenses, including standard mileage, parking, and tolls, up to the cost that would have been incurred had they traveled by common carrier.

The following costs associated with air travel can be used as a basis for comparison:

- The cost of round-trip commercial air fare that would have been incurred. A quote from the university’s managed travel software system should be obtained prior to the travel dates.
- Private vehicle mileage to and from the air terminal that would normally be used for departure.
- Lodging, meal, and incidental expenses that the employee would normally incur with air travel.

L. PRIVATE VEHICLES

Private vehicles may be utilized for business-related travel.

Employees and agents authorized to use their privately-owned vehicles for official business are required to have personal automobile liability insurance to provide the primary coverage for any accidents involving that vehicle. University-provided automobile liability coverage will apply on a limited basis after the employee's primary coverage limits have been exhausted. For additional information, contact Safety and Risk Services.

The university’s Policy on Vehicles provides guidelines regarding driver and vehicle qualifications.

The per-mile reimbursement rate is determined by the Internal Revenue Service (IRS). Employees who receive a Car Allowance Stipend are not eligible for per-mile reimbursement.

Mileage for the most direct, usually-traveled route may be reimbursed. The university reimburses for use of a private vehicle at the pre-established rate regardless of the number of passengers in the vehicle.

Substantial deviations from standard distances or usual routes must be justified. Mileage calculations generally start at the employee's official work station.

Travel for personal reasons or entertainment is not reimbursed.

Travel between the employee’s home and official work station is a personal commuting expense and is not reimbursed.

M. VEHICLE RENTAL
Vehicle rental expenses for official university travel may be paid/reimbursed. A car, boat, aircraft or other vehicle may be rented when it is the most cost-effective, efficient means of transportation that meets the business purpose. Receipts are required for vehicle rentals. Employees are encouraged to utilize University of Oregon or State of Oregon contracts which provide rental discount rates, car upgrades, and insurance coverage. Employees are also encouraged to use their corporate travel cards when renting vehicles because of the primary Collision Damage Waiver (CDW) coverage provided.

(1) Insurance on Rented Vehicles
The university maintains self-insurance coverage for rental vehicles if they are to be used exclusively for official university business. A certificate of insurance may be obtained from the Office of Risk Management.
If a rental vehicle is to be used for a mix of personal and business purposes, the university’s self-insurance coverage is only applicable for the portion of travel applicable to official business. The employee or agent will want to check with their insurance agent regarding coverage for personal usage.

If the employee or agent plans to travel outside the United States, its territories and possessions, and Canada, the department should contact the Office of Risk Management for help in obtaining the appropriate coverage.

(2) Responsibilities After an Accident
The renter of a vehicle involved in an accident is responsible for immediately reporting the accident to the Office of Risk Management.

N. LOANED/COURTESY VEHICLES
If permitted under federal and state law, university policies governing employee ethics, and other applicable restrictions, use of loaned/courtesy vehicles may be authorized when it benefits the university. Some companies may lend vehicles to the university, departments, or individual employees for specified purposes. The operator is reimbursed for actual out-of-pocket expenses arising from using the vehicle for official business. The university reimburses for use of vehicles without regard to the number of passengers in the vehicle. The university will not pay or reimburse an employee for any vehicle expenses that are also being paid by an outside source directly to the university employee.

(1) Insurance on Loaned/Courtesy Vehicles
Employees and agents authorized to use loaned/courtesy vehicles for official business are required to have personal automobile liability insurance to provide the primary coverage for any accidents involving that vehicle. University-provided automobile liability coverage may apply on a limited basis after the employee’s primary coverage limits have been exhausted. For additional information, contact the Office of Risk Management. The university’s Policy on Vehicles provides guidelines regarding driver and vehicle qualifications.

O. MOTOR POOL AND UNIVERSITY-OWNED VEHICLES
Motor pool and university-owned vehicles may be used for official university business only. Use of a state motor pool or university-owned vehicle is not authorized when costs are charged to Agency Funds, except for use by university organizations or for other legitimate state business purposes as approved by authorized university personnel. The department that authorizes a motor pool or university-owned vehicle's use by an employee or student is financially accountable for damages and all costs resulting from violations of policies relating to use of the motor pool or university-owned vehicle.

(1) Private Use Prohibited
Using a motor pool or university-owned vehicle for private or personal purposes or allowing another person to do so is prohibited.

(2) Vehicle Safety Including Authorized Drivers
The university’s Policy on Vehicles provides safety guidelines regarding transportation in a motor pool or university-owned, leased, or controlled vehicle.

(3) Overnight Parking at Employee's Residence
A motor pool or university-owned vehicle may be kept overnight at an employee’s residence when doing so is approved in advance by authorized university personnel.

P. MISCELLANEOUS EXPENSES

The university pays/reimburses authorized miscellaneous business-related travel expenses. The university maintains a list of miscellaneous travel expenses which may not be authorized for payment/reimbursement. All miscellaneous expenses must be itemized.

Authorized miscellaneous business-related travel expenses are not paid/reimbursed using per diem funds; rather, if the traveler has incurred a miscellaneous business travel expense as outlined below, that expense is payable/reimbursable at the actual cost.

(1) Checked Baggage
Up to two (2) standard-weight bags (standard weight as defined by the airline used). Charges for the following may be paid/reimbursed only when necessary for the business purpose and approved by authorized university personnel (receipts required):
  • additional baggage (more than 2 bags)
  • overweight/oversize baggage

(2) Other Business-Related Travel Expenses That May Be Authorized for Payment/Reimbursement
  • Telephone
  • Fax
  • Internet
  • Postage
  • Printing and mailing services
  • ATM cash advance fees
  • Materials and supplies purchased to meet an immediate business need
• Visa and passport expenses
• Vaccinations or medications required for foreign travel (if not paid/reimbursed through health insurance coverage)
• Parking
• Tolls

Q. PER DIEM RATE REFERENCES

Per diem rates for the continental United States are determined by the US General Services Administration. Per diem rates for the non-continental United States and Territories (e.g., Alaska, Hawaii, Guam, Puerto Rico) are determined by the US Department of Defense. Per diem rates for foreign locations are determined by the US Department of State.

R. EXCEPTIONS

Upon consideration of documented extenuating circumstances, exceptions to these policy provisions may be granted by the Vice President for Finance and Administration or designee.

Related Resources

Concur Login and Resources
International Travel Registration and Insurance Cards
Lodging & Meal Reimbursement Rates
University Fiscal Policy
University Policy on Vehicles