



Administration and Finance

Policy No: 3331

Policy Name:
Travel Policies and Procedures

Effective Date:
April 3, 2007

Policy:
The following University of Maryland, Baltimore travel policies are intended to cover all business trips regardless of the fund sources.

Revision Date:
N/A

- A. Travel Approval
- Pre - approval is required for all out-of-state and foreign travel by the submission of an Out-of-State Travel Request form.
 - Approval for in-state travel is either verbal or written depending on the school/department.
 - All travel must be documented, i.e. out-of-state travel request and/or expense statement with supporting documentation.

Approved by:
Marc E. Wasserman
Director
Financial Services

- B. Reservation and Ticketing
- When a traveler arranges business travel through a contracted travel agency, air and rail charges can be billed directly to the University's travel account.
 - If a traveler would like to purchase airline tickets directly, they may do so either by utilizing their University issued American Express card or a personal credit card. A traveler can purchase special "Internet Only" tickets sometimes at better pricing, since these fares are not offered to the contracted travel agencies. Because airline tickets are typically purchased well in advance of the travel date, Financial Services will reimburse employees at the time the tickets are purchased.
 - Travelers are expected to make advance bookings, using the least expensive logical fare via the most direct route (or other reasonable routing that results in a lower fare) and are encouraged to purchase air and rail tickets and reserve in-trip services through the contracted travel agencies.
 - Federal regulations require travel on US air carriers at coach rates (Reference: Principal Investigator's Handbook – Pages 1.2-5) and this is in relation to federally sponsored contracts and grants.
 - Air and rail travel other than coach will be reimbursed only:
 1. When necessary because it is the only service offered between two points.
 2. When schedules, routing changes or cancellation of service make such travel necessary, this will be taken into consideration for reimbursement.
 3. When such accommodations are necessary for approved medical reasons, they will be taken into consideration for reimbursement.
 - In the absence of an explanatory statement, reimbursement will be reduced to the coach or service used.
 - If the traveler uses a travel agency other than the University's contracted travel agencies, the traveler must pay and subsequently be reimbursed.

Approval Date:
April 3, 2007

Refer Questions to:
Travel Coordinator
410-706-6527

Travel Web Page
Financial Services
Web Page

**USM Board of
Regent's Policy
Reference:**
N/A

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- Fees for changed plans, cancellations and other penalties will be paid by the campus only when the cancellation or charge was made for the convenience of the campus or was necessitated by circumstances of an emergency nature affecting the travel.
- C. Hotel, Meal and Other Expense Reimbursements
- The cost of hotel accommodations will be reimbursed on the basis of a single room rate. Any overages above the single room rate that are a result of non-official travelers using the accommodations will be the personal financial responsibility of the traveler.
 - For domestic travel, travelers are not required to provide individual meal receipts or to show a per meal breakdown for daily travel using the University published Standard Meal rates (See Travel Web Page).
 - Foreign travel meals are reimbursed at either the University published Standard Meal rates, actual costs with receipts or at the applicable U.S. Department of State Meal and Incidental Rates (M&IE) without receipts. The per diem rate should be for the city in which the traveler is staying (hotel bill). The M&IE rates include incidentals, which are delineated under Definitions and Terms. (See Travel Web Page)
 - Meal reimbursements are allowable for partial day's travel with the following guidelines:
 1. The cost of breakfast and/or dinner when the employee must leave home and/or return home, in travel status on official business, two hours before or after the normal work day. The two hours are in addition to the normal commuting time.
 2. The cost of lunch when an employee is in travel status for a normal day (or 8 hours).
 - Business meals are reimbursable in accordance with the Department of Financial Services Policy No. 3332.
- D. Use of Institution and Personal Vehicles and Car Rentals
- State (i.e. Institution or System-owned) vehicles may be driven only by University/System authorized employees and authorized institutional employees when acting within the scope of their public duties. Any person driving a State owned vehicle must have a valid driver's license.
 - Properly insured personal vehicles may be used for travel on institutional business.
 - The settlement of any fines or penalties imposed for traffic or other violations is the responsibility of the individual and cannot be claimed for reimbursement.
 - When a car rental is deemed necessary, the University expects the rental of the least expensive car.
- E. Employee Travel with Spouses
- The institution will not reimburse any expenses incurred on behalf of the spouse, when spouse travels with institution employees but are not themselves serving as agents of the institution.

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F. Interviewing and Recruitment For Prospective Employment with the University

- Travel expenses incurred with respect to employment interviews and recruitment are reimbursable when authorized. Expenses of a spouse accompanying a prospective employee are also reimbursable, if authorized by the school/department.

G. Travelers' Insurance Coverages

- State of Maryland
All University employees are automatically covered for injuries received while traveling by air on business of the State. State travel insurance does not cover rail travel.
- Travel Agencies
When air and rail tickets are purchased through the University's contracted travel agencies and billed to the University, travelers automatically receive travel and baggage insurance.
- Emergency Evacuation Services
This insurance coverage relates to transportation, travel and temporary lodging expenses for emergency evacuation for medical/civil or political unrest. The insurance is for evacuation to the United States or another appropriate site. The insurance policy must be obtained by the traveler. This is required for all employees traveling outside the United States.

H. Travel Advances

- Travel advances are not provided under normal circumstances. There is an exception in relation to contracts and grants, when foreign travel is involved. The contract or grant must stipulate in its documentation the criteria for an individual on foreign travel status to qualify for an advance.

Definitions and Terms:

In-state Travel – This not only includes the State of Maryland, but the Washington, D.C.- Metropolitan Area and the northern counties of Virginia (Fairfax, Falls Church, Alexandria and Arlington).

Contracted Travel Agencies – The University has contracted with several travel agencies for travel services.

M&IE Incidentals – The U.S. Department of State Meal and Incidental Rates (M&IE) includes incidentals such as laundry and dry cleaning expenses, taxes, service charges and customary tips.

Purpose:

To further define and support the University System of Maryland Travel Policy.

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Scope:

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

- Facilitate travel arrangements.
- Define responsibilities for travel authorization.
- Provide guidance for the allowable expenditure of travel funds and supporting documentation.

Restrictions and Exclusions:

- Travel advances.
- Non-reimbursable expenses.
 1. Alcoholic beverages.
 2. Fines.
 3. Hostess gifts.
 4. Lost or stolen tickets, cash or property.
 5. Additional flight insurance premiums.
 6. Costs incurred by unreasonable failure to cancel transportation or hotel reservations.
 7. Expenses not directly related to, or necessary for, the purpose of University travel.
 8. Spousal expense.

Responsibilities:

Traveler and the traveler's department:

- Obtain permission to be on travel status.
- Prepare the appropriate travel forms.
- Adhere to the campus travel policies and procedures, as well as specific travel requirements of contracts and grants.

Travel coordinator:

- Review the traveler's forms in relation to the campus travel policies and procedures, as well as specific travel requirements of contracts and grants.
- Processing of the travel expense statements for reimbursement through payroll or accounts payable.
- Preparing the journal entry to distribute the airline charges.
- Processing the monthly invoice for Diner's Club.
- Being the contact person for questions from the campus community, travel agencies, etc.

Procedures:

The following University of Maryland, Baltimore travel procedures are intended to cover all aspects of a business trip from approval to reimbursement of travel expenses. All travel reimbursements must be submitted on a Travel Expense Statement. All Travel Expense Statements will be processed for reimbursement through payroll or accounts payable depending on the classification of the traveler at the time of processing.

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A. Reservation and Ticketing

Contracted Travel Agency

- Traveler must have completed an out-of-state travel request form. (See Travel Web Page)
- Telephone travel agency. Identify yourself as an employee from UMB, your office and school/department and your telephone number, tell the agency the Project ID (chartstring) to which the trip is to be charged and the "T" number on the out-of-state travel request form.
- To request airline information, tell the agency the following information:
 1. The date of departure/approximate time.
 2. The date of return/approximate time.
 3. The city of origin and destination.
 4. Any special seating requests.
 5. Any special meal requests.
 6. If you can take advantage of cost saving alternatives, such as non-refundable fares, flights with connections vs. non-stop flights, or Saturday night stays.
- Request any hotel or car rental reservations. These must be charged to your personal credit card.
- Before ending the conversation:
 1. Verify the airfare. Is this a non-refundable fare? Are there restrictions or change and cancellation penalties once the ticket is issued?
 2. Ask the travel agent to recap your entire itinerary. Careful attention should be given to date and time of travel.
 3. Note the agent's name.
 4. Special delivery instructions?
 5. Verify it is an approved US air carrier if air travel is to a foreign country specifically for research contracts and grants.
- Fax out-of-state travel request form with school/departmental approval to the travel agency. **Tickets will not be issued without an Out-of-State Travel Request.**
- Travel agency will fax or e-mail itinerary to the traveler. This must be reviewed for accuracy.
- To cancel or change travel reservation, call travel agency.
- The travel agency will provide the following services to the University:
 1. Guaranteed lowest applicable airfare at the time of booking.
 2. A 24-hour, toll free telephone service – 7 days a week; a telephone counselor will be available for emergency travel assistance. En route changes of airline, hotel, or car rental arrangements can be effected with a single telephone call to the "hotline". Agencies operate a toll free line directly into the reservation center during normal business hours.
 3. Last seat availability – through the "direct access" computerized airline systems used by the travel agencies, agents can directly access the very last seat available from specific airlines.

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4. Boarding passes.
5. Seat assignments – travel agencies have direct computer access to most airline reservation systems to reserve a specific seat in accordance with a traveler's preference (subject to availability).
6. Preferred availability of hotels.
7. Visa and passport processing.

Purchasing Airline Tickets Over the Internet

- Complete an Out-of-State Travel Request form and obtain all required approvals
- Shop the internet for the best fares. Check the major air carriers and/or use only reputable third party discount sites. Do not participate in auction sites. Be careful of the "fine print" and note that many tickets are changeable only with a fee and/or are non-refundable.
- Call one of the University's contracted travel agencies and see if they can match or beat the best Internet price that you were able to locate. Be careful to note any fees or other charges when comparing prices. Both contracted travel agencies charge a small fee per printed ticket. Many Internet sites also charge fees that may be significant.
- If you decide to purchase your ticket over the Internet, you may do so by charging the ticket on your University-issued American Express Card or a personal credit card. If you do not have a University-issued American Express Card and would like one, please contact Financial Services, extension 6-3882.

B. Hotel, Meal and other Expense Reimbursement

Travelers will be reimbursed on the basis of a single room and the related taxes. A copy of the hotel bill must accompany the Expense Statement for reimbursement.

Travelers will be reimbursed at the University published standard meal rates for domestic travel. (See Travel Web Page) Travelers are not required to provide individual meal receipts or to show a per meal breakdown.

For foreign travel, travelers will be reimbursed at either actual costs with receipts or at the applicable U.S. Department of State Meal and Incidental Rates (M&IE) without receipts.

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C. Use of Institution and Personal Vehicles and Car Rentals

Employees using State (i.e. Institution or System-owned) vehicles have a payroll deduction for auto.

The use of a personal vehicle will be reimbursed at the University published mileage rate. (See Travel Web Page) During business days, reimbursable mileage is calculated from the starting point of the trip or from the normal place of employment, whichever is less. On non-business days, the trip will be calculated from the starting point of the trip.

Car rental will be reimbursed for the least expensive car. The traveler should take advantage of University/System, federal and state government, and institution vendor discount rates which are available. The renter should not purchase Collision Damage Waiver (CDW) or Loss Damage Waiver (LDW). Vehicles rented to the State are covered for liability under the Maryland Tort Claims Act. As with all claims, the University will be responsible for the first \$1,000.00 of damages. If damage occurs to a rental vehicle, the employee must report the incident to the Office of Environmental Health & Safety-Risk Management at 6-2331 or 6-7034. Information can also be obtained from the Environmental Health & Safety Web Page under Fleet Management.

D. Employee Travel with Spouses

Traveler must maintain a record of individual expenses, since the University will only reimburse the traveler for their expenses.

E. Interviewing and Recruitment for Prospective Employment with the University

The Out-of-State Travel Request and Expense Statement would include the prospective candidate's and the spouse's (if appropriate) names and the combined expenses.

F. Travelers' Insurance Coverages

- **State of Maryland**
The coverage is only for traveling by air. The beneficiary designation form is not necessary, if the traveler is a member of one of the State's Retirement Systems. The beneficiary will be the individual cited in the State Retirement System. More information can be found on the Environmental Health and Safety Web Page under Air Travel Insurance.
- **Travel Agencies**
UMB's contracted travel agencies provides each University traveler, at no additional cost, automatic common carrier and flight insurance for each trip by air or rail. The beneficiary will be the individual cited in the State Retirement System. The insurance covers all common carrier and airport transfers.
- **Emergency Evacuation Services**
The traveler will purchase the insurance and be reimbursed on a travel expense statement.

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G. Travel Advances

Travel advances are only provided to individuals that are on contracts and grants which involve foreign travel. An Out-of-State Travel Request and Expense Statement are required to obtain and advance. The contract or grant must specify in its documentation that University employees and non-employees are to receive advances for meals and lodging, while in working travel status. The advances must be in accordance with the U.S. State Department Meal and Incidental Rates (M&IE).

I. Required Documents

	In-State	Out-of-State	Foreign
A. Out-of-State Travel Request		X	X
B. Expense Statement	X	X	X

II. Reimbursements

The following are reimbursable travel expenses with submission of original receipts:

• Reasonable expenses for ground transportation to and from airports, railroad stations, hotels and meeting places.	X	X	X
• Parking fees	X	X	X
• Bridge or related tolls	X	X	X
• Telephone calls necessary to obtain transportation and hotel reservations.	X	X	X
• Telephone calls allowing travelers to stay in reasonable contact with their office or family.	X	X	X
• Laundry/valet services are permissible, when an employee is required to be in travel status over one week.		X	X
• Portage for porters, bellhops and maid service (See Travel Web Page)	X	X	X
• Registration fees charged by various professional societies and other organizations for attendance at conventions, conferences and workshops, not paid in advance by the University.	X	X	X

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	In-State	Out-of-State	Foreign
• Business Center – administrative services Such as copying and faxing documents, etc.	X	X	X
• Visas/Passports			X
• Inoculations or other required prophylactic medicines			X
• Photographs for travel documents			X
• Internet Services	X	X	X
• Emergency Evacuation Services			X

Forms:

See Travel Web Page or Financial Services Web Pages for forms and their preparation.