

UNIVERSITY OF HOUSTON  
GRADUATE COLLEGE OF SOCIAL WORK

**TRAVEL POLICY**

**UPDATED SEPTEMBER 2019**

**GENERAL STATEMENT**

All travel requires advance authorization/approval, on a Travel Request in Concur, from a supervisor and the Director of College Business Operation or the College Department Business Administrator. Travel includes all use of a vehicle between duty points undertaken on behalf of the University of Houston and the Graduate College of Social Work (GCSW) outside the surrounding Houston area. If airfare is not required for travel you must still complete a Concur Travel Request for travel approval. Travel by university faculty and staff, and individuals not employed by the institution but who are traveling on official University of Houston business, is restricted by State of Texas and federal regulations. Employees should plan travel to achieve maximum savings and cost efficiencies. **Expenses for such travel shall be at the lowest possible rates, considering all relevant circumstances.** Claims for reimbursement of travel expenses will be evaluated based upon their justification as a business expense and authorized under the involved sponsored project. The GCSW enforces procedures for travel paid or reimbursed from state-appropriated funds and local funds (non-state appropriated). Some Sponsored Project guidelines require following the state-appropriated funds travel procedures.

**All reimbursement claims should be submitted immediately upon return of trip, but absolutely within thirty (30) days of return of travel. All requests for reimbursement must be submitted with a Travel Expense Report in Concur and required documentation (airline itinerary, itemized hotel bill, itemized meal receipts, incidentals, etc.).**

**I. FACULTY TRAVEL FOR PROFESSIONAL CONFERENCES**

GCSW faculty present numerous refereed papers at national and international conferences. If funding is available, the College will fund faculty at the following levels when presenting refereed (peer reviewed) papers or a key note paper at

national or international conferences according to the limits identified below. With invited papers, travel is typically paid for by the entity extending the invitation; if this is not the case, the Dean will consider whether to support the travel or not.

- National (includes Canada, Central America, the Caribbean and Mexico): \$1,500 total
- International (all other locations): \$2,500 total

In FY2020, faculty development travel funds will support attendance at the following three professional conferences:

- Council on Social Work Education (CSWE)
- Society for Social Work and Research (SSWR)
- One additional professional conference of a faculty member's choosing

Faculty development funds can be used to support presentation of a poster at ONE of the above professional conferences.

Travel to participate in a national or international conference to present a paper or poster as previously described requires the Dean's approval, which is based on the recommendation of the Associate Dean for Research & Strategic Partnerships (ADRSP). The faculty member is required to first submit a request via email to the ADRSP, with supporting documentation that the paper or poster was accepted through a refereed process. Following review and preliminary approval by the ADRSP, the faculty member can then initiate the TR in Concur. The TR will be routed to the Dean for review and approval and then to the College Business Administrator for final authorization.

In order to increase faculty scholarship and dissemination of research findings, faculty who receive travel funds are required to do one of the following within 12 months:

1. Submit a manuscript for publication based on their presentation in a peer reviewed journal (proof of submission will be needed to request support for the same conference the following year);  
OR
2. Submit a proposal to a funding agency (proof of submission will be needed to request support for the same conference the following year);  
OR
3. Do a presentation based on the conference presentation for the internal GCSW community at the Monthly GCSW Research and Scholarship Meeting.

For faculty who do not meet this requirement, future travel funds will be restricted until one of these criteria are met.

Additionally, GCSW faculty are required to apply for Provost funding prior to requesting funding from the Dean and are expected to provide documentation indicating that Provost funding has been applied for.

Faculty who have start-up funds or who have budgeted travel in their funded research projects are encouraged to use these funds first, if possible.

In accordance with the Tier 1 mission, other research-related travel may be approved by the Associate Dean for Research and Strategic Partnerships on a case by case basis.

## II. PROVOST FUNDED FACULTY TRAVEL

The Provost's Office will have additional funds to support faculty presenting refereed papers at national and international conferences. The guidelines for and application form are available on the [Provost's Travel Fund](#) website. GCSW faculty are required to apply for Provost funding prior to requesting funding from the Dean.

## III. OTHER FACULTY TRAVEL

The Dean may authorize other non-research related travel for other activities that support the GCSW or University mission. A faculty member may request funding to support such travel by directly contacting the Dean. The faculty member will submit a request to the Dean with supporting documentation that details how and to what extent the proposed travel benefits the faculty member, the GCSW, and the University.

## IV. LOCAL FUNDS REGULATIONS

All travel requires advance authorization/approval, on a Concur Travel Request from a supervisor and the Director of College Business Operation or the College Department Business Administrator. All expenses must be reasonable and necessary for conducting university business during travel, as determined by the traveler's supervisor, and the travel must benefit the University of Houston. **All travel paid or reimbursed with local university funds must use those travel vendors that will provide the services required at the lowest possible price.** All travel arrangements should be made to minimize travel costs, while fulfilling the objective of the university travel. Airfare must be purchased at the lowest price available (i.e., coach class). Personal charge cards and individual travel cards may be used to secure travel arrangements. Reimbursements will be processed in accordance with the procedures stated within this policy.

**Hotel Occupancy Taxes** - UH employees are exempt from the state portion of hotel occupancy taxes when traveling on official business in Texas. It is the employees' responsibility to present a Texas Hotel Occupancy Tax Exemption Certificate to the Texas lodging establishment at the time of check-in. If the establishment does not honor the Exemption Certificate, the employee may still be reimbursed for the state hotel occupancy tax. A University of Houston System exemption certificate form is available at: [http://www.uh.edu/finance/TaxInformation/PDF\\_files/Hotel\\_Occupancy.pdf](http://www.uh.edu/finance/TaxInformation/PDF_files/Hotel_Occupancy.pdf).

## V. STATE-APPROPRIATED FUNDS REGULATIONS

**THE FOLLOWING FUND CODES MUST FOLLOW STATE RULES FOR TRAVEL: 1XXX, 5014, 5016, 5017, AND 5018.**

All travel requires advance authorization/approval, on a Concur Travel Request, from a supervisor and the Director of College Business Operation or the College Department Business Administrator. All expenses must be reasonable and necessary for conducting university business during travel and travel must benefit teaching, research, and/or community service at the University of Houston. **All travel paid or reimbursed with state-appropriated funds must use state or university contracted travel service vendors when available, for the following services:**

- Travel Agency**
- Airfare**
- Lodging**
- Rental Cars**

**State contracted travel service vendors** are available at:

<https://comptroller.texas.gov/purchasing/programs/travel-management/#skip-scroll>

### **Airfare**

<https://comptroller.texas.gov/purchasing/programs/travel-management/airline.php>

Approved travel agencies know the contracted airlines. State-contracted airfare is not available to prospective employees or contractors who purchase their own airfare. A list of contracted airfares can be obtained at the link above. The contracted airlines have state rates available. The "state rate" means that the tickets are refundable and may be changed. You may choose whichever rate you prefer, however, you **must** use a state-contracted airline. All airfare must be purchased at the lowest price available (i.e., coach class).

Airfare may be purchased from state-appropriated funds by:

1. Charging airfare to the individual travel card:
  - a. The person making the travel arrangements must verify that state contracted airfare is purchased, if available. A list of contracted airfares may be found at:  
<https://comptroller.texas.gov/purchasing/programs/travel-management/airline.php>
  - b. If the trip is later cancelled or not approved by a higher administrative authority (e.g., supervisor, Chancellor), the airfare should be refunded to the individual travel card. If non-refundable airfare is cancelled, the original charge should be moved to a local, non-state, cost center.
2. Airfare purchased from a non-contracted travel agency, if the purchase meets acceptable condition(s) of non-use of contracted travel services. The [Travel Exemption Certification Form](#) is required.
3. All airfare must be purchased at the lowest price available (i.e., coach class). No-cost upgrades to business class or first class airfare are acceptable, as long as the airfare receipt provided by the airline or travel agency clearly indicates that there is no additional cost for the upgrade.

#### **Lodging and Hotel Occupancy Taxes:**

A State of Texas Contracted Hotel must be used, if available. The Director of College Business Operations has access to the Hotel Engine search website and can search dates and destinations for State of Texas Contracted Hotels. If a contracted hotel is not used, acceptable conditions of non-use of contracted travel vendors will require the completion of a [Travel Exemption Certification Form](#) before travel is undertaken.

**Contractors are not eligible for state-contracted hotel rates. Lodging reservations need to be guaranteed and paid by using a personal charge card.**

UH employees are exempt from paying the state (Texas) portion of hotel occupancy taxes. **Employees are responsible for presenting the Texas Hotel Occupancy Tax Exemption Certificate to the Texas lodging establishment at the time of check-in. Employees may not be reimbursed for the state hotel occupancy tax if they did not properly present the Exemption Certificate to the hotel.** If the establishment does not honor the Exemption Certificate, the employee may be reimbursed for the state hotel occupancy tax as follows:

1. The employee provides the name, address and phone number (if available) of the Texas hotel/motel that refused the certificate.
2. The employee faxes or e-mails the above information and the following or similar statement to the Travel Coordinator: “[name of hotel] refused to honor Texas Hotel Occupancy Tax Exemption Certificate on [date].”

3. The Travel Coordinator signs the statement and faxes it back to the employee or returns the e-mail indicating approval.
4. The Travel Coordinator notifies the Comptroller's Office that the Texas hotel or motel refused to honor the Exemption Certificate.

Employees may not be reimbursed for state hotel occupancy tax with state funds if they did not properly present the Exemption Certificate to the hotel. Non-employees are not exempt from the state hotel occupancy tax and should be reimbursed for this expense without explanation.

### **Rental Cars: Avis & Enterprise**

<https://comptroller.texas.gov/purchasing/programs/travel-management/rental/>

Rental cars may be obtained for university travel in one of the following ways:

1. State -contracted rental car charged directly to a GCSW department account through a direct billing arrangement. **Rental cars may not be direct billed for contractors.**
2. State-contracted rental car charged to the individual travel card or personal credit card.
3. Non-contracted rental car charged to the individual travel card or personal credit card, if the purchase meets acceptable condition(s) of non-use of contracted travel services. The [Travel Exemption Certification Form](#) is required.

State-contracted rental car costs include liability and loss/damage waiver insurance in the base rate, while non-contracted rental car costs do not. If a non-contracted rental car company is used, it is the traveler's responsibility to obtain the proper insurance coverage. **Contractors are not eligible for the state-contracted rate or direct billing.**

### **Travel to Washington, D.C.**

In addition to obtaining advance approval on the Concur Travel Request, the following procedures must be followed for state-appropriated funded travel to Washington, D.C.:

1. The Office of State-Federal Relations must be notified of (not approve) travel to Washington, D.C., no later than seven calendar days before travel begins. The responsible unit must complete the Report of State Agency Travel to Washington, D.C., at the following Internet address:  
<http://www.osfr.state.tx.us>.
2. When the information has been submitted online, a confirmation page will be created, which must be printed and attached to the Travel Request before it is routed for approval.
3. If notification is not given within seven days of departure, a letter of explanation must be faxed to the Office of State-Federal Relations at (512)

463-1984. This letter must also be attached to the Travel Request before it is routed for approval.

## VI. REIMBURSEMENT LIMITS/OPTIONS

### A. Meals & Lodging

1. **Non-Overnight travel** - meal expenses incurred during non-overnight travel are **not** reimbursable for University of Houston travelers. However, meal expenses incurred by prospective employees during non-overnight travel may be reimbursed. Such expenses should not be lavish or extravagant in view of the circumstances.
2. **Overnight travel** - meal expenses for overnight travel on local funds will be reimbursed with an itemized receipt. State-appropriated funds no longer require an itemized receipt. Expenses will be reimbursed per the following:

#### **Local Funds:**

It is preferred that all meal expenses are supported by itemized receipts. All lodging must be accompanied by an itemized receipt.

#### **[Combine Travel Meals and Lodging Limits](#)**

#### **State Funds:**

All lodging and meals expenses must be supported by itemized receipts.

#### **[Per Diem Rates](#)**

Within the above limits, travelers may only be reimbursed up to the amount actually expended.

Employees may not be reimbursed for a lodging expense incurred at a place that is not a commercial lodging establishment in accordance with Texas Government Code Sec. 660.113.

#### **Mileage**

Mileage in a personal vehicle while on university travel may be reimbursed. The current state mileage reimbursement rate can be found at:

<https://fmx.cpa.state.tx.us/fm/travel/travelrates.php> . Employees may calculate the number of miles by using a mapping service website such [Mapquest](#).

However the mileage tool within Concur should be used to request reimbursement for mileage.

#### **Registration Fees**

Registration fees can be paid directly to sponsoring organizations in advance by Purchase Voucher (state and local funds), individual travel card, or p-card, or be

reimbursed to the traveler on a Travel Expense Report after the trip is completed (state and local funds). A receipt is required for registration reimbursement.

### **Car Rental**

All drivers must be approved by the Office of Risk Management by way of an Motor Vehicle Record Evaluation. Prior to renting a vehicle for business purposes, on behalf of the university, the [MVR Request Form](#) must be completed and approved by the Office of Risk Management.

### **Incidentals**

Incidental expenses must be itemized on the Concur Travel Expense Report. Receipts are not required for incidental expenses unless an individual expense exceeds \$75.00. However, travelers should always ask for a receipt and provide it as documentation with the reimbursement request.

Reimbursable incidental expenses include:

1. Hotel occupancy taxes for lodging within the United States. Taxes will only be reimbursed in proportion to the lodging expense reimbursement. Hotel occupancy taxes are considered part of the lodging expense (not an incidental expense) for lodging outside the United States.
2. Telephone calls (only related to university business).
3. Gasoline charges when a vehicle is rented.
4. Toll charges.
5. Copying charges.
6. Passport or visa charges, departure taxes, and inoculations for foreign travel.
7. Postage.
8. Notary fees.
9. Charges to exchange U.S. currency for foreign currency and vice versa. The exchange rate used for conversion must be attached as supporting documentation.
10. Travelers check charges.
11. Mandatory charges by a commercial lodging establishment other than the room rate.
12. Books or documents purchased for and while attending a seminar or conference.
13. Tips for baggage handling or other services where it is customary to tip. Discretion must be used to ensure tips are given only in appropriate circumstances and for appropriate amounts, not to exceed 20% of the amount charged.
14. Fax charges.
15. Parking.
16. Laundry and dry cleaning expenses incurred during a travel for a trip lasting longer than six days.



## **B. Travel Outside the United States**

In order for any part of travel outside of the United States to be reimbursable, the trip must either: 1) meet the criteria that all of the travel is entirely for business (i.e., no personal activities); or 2) meet one of the exceptions allowed by the IRS to be considered entirely for business.

Until the Provost deems the trip, or a portion of the trip, to be considered entirely for business, no portion of the international travel may be reimbursed.

1. Travel is entirely for business if the traveller spends the entire time on business activities.
2. Travel is considered entirely for business if (1) the traveller is not a managing executive, and (2) the travel was approved by the appropriate Vice President/President as business travel in accordance with the IRS guidelines. **Such approvals must be obtained to travel. Travel not approved by the appropriate Vice President/President is not considered entirely for business and the transportation costs to and from the business destination will not be paid or reimbursed.**

Transportation costs to/from the business destination will be paid/reimbursed 100%, not including personal destinations or side trips. Other travel expenses, such as meals, lodging, and local transportation, will be reimbursed only if they are incurred on days spent on business activities. Expenses for days spent on personal activities will not be reimbursed.

- a. If the traveler's actual airfare includes a personal destination, the traveller must provide a lowest priced airfare quote that only includes business destinations. The traveller will be reimbursed the lesser of the actual airfare, which includes the personal destination, and the quote, which only includes business destinations. Airfare that includes personal destinations may not be directly charged to the university on a voucher or travel card.
  - b. All meals, lodging, and other travel expenses incurred on personal days will not be reimbursed to the traveller and may not be directly charged to the university on a voucher or travel card.
  - c. Any additional expenses incurred (additional hotel room charge, additional baggage fees, etc.) because a family member is traveling with the employee for personal reasons may not be charged to the university or reimbursed to the employee.
- C. Travelers should contact the business office prior to making travel arrangements for trips that combine both business and personal travel if they have questions about compliance with this policy.**

## VIII.COMPLETION OF TRAVEL EXPENSE REPORT - ALL TRAVEL

The Travel Expense Report should document all trip-related expenses, whether direct-billed to the university or reimbursed to the traveler, as well as third party reimbursements, or disallowed travel expenses.

**The traveler is responsible for completing and submitting a Travel Expense Report with all required documentation within 30 days of return of travel.**

### **1. Traveler Completes A Travel Expense Report And Submits, Through Concur, With Supporting Documentation**

The traveler must initiate all requests for reimbursement by completing a Travel Expense Report. Amount of meal and/or lodging expenses claimed each day of travel must be itemized and entered on a separate row in the corresponding column. The traveler must provide a daily itemization of meal expenses on the form.

### **2. Traveler Provides Required Documentation/Receipts**

- a. Airline itinerary, Ground Transportation, etc.
- b. Trip Itinerary
- c. Conference agenda or daily trip itinerary
- d. Itemized Lodging Receipt- verify that the state portion of the hotel occupancy tax was not charged for lodging in Texas
- e. All itemized meal receipts for local funded travel only. Do not attach meal receipts to state funded travel expense reports.
- f. Itemized incidental expenses: Parking, phone calls, etc.
- g. Itemized car rental receipt showing payment
- h. Receipt and documentation for registration fee, if paid personally
- i. Receipts in foreign currency will automatically be converted to U.S. dollars in Concur

### **If State-Appropriated Funds, the following must also be included:**

- a. Travel Certification Form/ Addendum B (If personal choice was not to use a state-contracted vendor).
- b. Hotel conference registration form (If not using the state-contracted hotel because conference requires particular hotel).
- c. Memo requesting exception for non-contracted travel agent airfare purchase, with documentation, if applicable.
- d. For foreign travel, copy of the approved Request for Governor's Approval.
- e. For travel to Washington, D.C., a copy of the confirmation page for reporting
- f. If state hotel occupancy tax was charged, a copy of the UH Travel Coordinator approved statement.

## **X. FOREIGN TRAVEL**

The traveler must submit a specific statement for the appropriate Vice President's approval prior to the trip, which describes the need for the trip and the benefit or expected benefit for the university. This statement must be included with the Travel Request. Following the trip, the traveler must submit an agenda to the appropriate Vice President, as well as a trip report that describes the activities and meetings including those attending, and how the trip was beneficial for the university. Conference programs or other documentation are to be provided in support of the statement. In a similar manner, senior administrators who report directly to the president shall provide a detailed statement and agenda for foreign travel.

## **XI. TRAVEL RELATED INSURANCE**

- A. Travel must be approved in advance to ensure travelers are covered under the university workers' compensation programs insurance and to provide legal protection as they perform official duties.
- B. In addition, the state travel card vendor provides travel insurance when the airfare is charged to the to the traveler's individual corporate travel card.
- C. State-contracted rental cars include liability insurance and the collision damage waiver in the contracted price. However, they are not generally included in the price of non-contracted rental cars. Therefore, travelers should purchase liability insurance, unless covered by their own car insurance, and the collision damage waiver for non-contracted rental cars. Total cost may not exceed the cost of state contracted rental car that includes the liability insurance and the LDW.
- D. A Travel Request is not required for insurance purposes when travel is limited to the Houston area (i.e., for intercity mileage). However, it should be evident that the employee was driving to or from a university-related meeting.

## **XII. NON-REIMBURSABLE EXPENSES**

Expenses, which are the responsibility of the traveler and are not reimbursable include, but are not limited to, the following:

- 1. Movies (in a hotel or theater), sporting events, concerts, and plays
- 2. Any expense not related to university business
- 3. The portion of any expense considered lavish, extravagant, or unnecessary to accomplish university business in view of the circumstances
- 4. Expenses attributable to other travelers. However, rental cars and taxi fares may be reimbursed to one traveler, though more than one traveler uses the same rental car or taxi.

5. Expenses related to personal travel
6. Gas for personal vehicle (reimbursement is included in the mileage allowance)
7. Traffic and parking violations
8. Fees for automobile storage or repair
9. Excess baggage charges for personal belongings
10. Individual membership dues; dues must be in the name of the University or college
11. Personal expenses such as dry cleaning and medical items
12. Alcoholic beverages

### **XIII. LINKS TO CONCUR AND TRAVEL INFORMATION**

Please go directly to the university's travel webpage for all updated information:

<http://www.uh.edu/office-of-finance/ap-travel/travel-policies/>