Contents
Travel Approval Procedures

Introduction:

Approval Policy:

Special Approval Procedures:

Travel Reimbursement Guidelines

Overview

Business Purpose

Meals

One day trips

Lodging

Qualified Oregon Lodging Establishments

Transportation

Air Travel Requirements

Mileage

Vehicle Rental

Conferences

Sabbatical or Other Leave

CAS Guidelines for Sabbatical Supplements

Miscellaneous

Receipts

Revised 5/17/10 MG Page 2
Travel Approval Procedures

Introduction:

Units within CAS are responsible for ensuring that employee travel has been properly approved and that applicable travel policies, rules, regulations, procedures and guidelines have been applied. The College of Arts and Sciences has been delegated the task of assigning a hierarchy of responsibility for approvals for employee travel payments from all university funds. To that end, departments and programs have been asked to develop written employee travel approval policies and procedures readily available to all travel staff and travelers for reference. A copy of these procedures must also be filed with the CAS Dean’s Office each year.

Approval Policy:

- All travel paid with Department of Biology funds, excluding course field trips, must be reviewed and approved by the department head. If the department head is not available, a member of the Executive Committee is authorized to give approval. In the case of travel for the Department Head, such expenses are reviewed and approved by the CAS Dean (or designee).

- Travel approval should be obtained in advance of the trip if at all possible. (Please note that without advance approval neither the university nor the department have an obligation to reimburse for travel expenses.)

- Requests for travel approval must be in writing (email acceptable) and must include a business purpose, the level of expenditures, and the
source(s) of fund(s).

- The statement of business purpose must include at a minimum
  
  - Start and end dates, or multiple dates when personal and professional travel are combined
  
  - Location(s)
  
  - Activity
    
    - The name(s) of the organization(s) involved (no acronyms, please); the names and positions of individuals visited/consulted; places or institutions visited; or other descriptions as appropriate.
    
    - A description of the activity itself. The description of the activity should be specific and mention, for example, research topic, whether you gave a seminar, gave a talk at a meeting, chaired a session at a meeting, went to a meeting to recruit graduate students, and the like, as appropriate.
    
    - A statement addressing the job related nature of the trip and the direct benefits derived by the university.

Special Approval Procedures:

Please note two special situations:

1. Faculty who plan to travel during the academic year when classes are in session, even though they themselves may not be teaching during the
term of the planned trip, must follow the policy of the CAS Statement of Faculty Responsibility. This policy requires faculty to make their absence from campus known depending on length of time away.

2. Faculty requesting funds for travel during a sabbatical leave year must obtain additional approval in advance from the CAS Dean’s Office and the Vice President of Academic Affairs using the **Sabbatical Approval Request Form**. This applies to all UO funds used for travel including, but not limited to, general funds, foundation funds, and grants.
Travel Reimbursement Guidelines

Overview

Travel Reimbursement Request forms are used for the reimbursement of travel expenses of employees, students, and non-employees. A travel reimbursement cannot be filed before the trip is completed and should be filed in a reasonable period of time. The IRS defines reasonable as within 60 days. If the trip is exceptionally lengthy, interim filings may be permitted. Travel reimbursements on Grant Funds must be submitted within 3 months of completing the trip.

It must be signed by someone in the department who is authorized to sign on the index being used. The traveler must sign in the claimant's signature box and should be original. When it's difficult to obtain an original signature, a faxed signature is acceptable for payment processing. Another individual may not sign on behalf of the traveler.

If the traveler does not want to claim the maximum allowable rates, the reimbursement must state "claiming only".

One person can claim expenses for another person and be reimbursed. They must have proof that they paid the expense in order to be reimbursed.

When combining personal travel with U of O business travel, payment will be based on the least expensive and reasonable means of transportation, and the meal and lodging per diem to which the traveler would have been entitled to while traveling on official business. This is generally one day before and one day after the dates of the conference/meeting. No payment will be made for vacation days. Expenses associated with an employees family and friends that travel with the traveler, are not reimbursable. Sight seeing costs are also considered a personal expense and will not be reimbursed.

Incidental expenses have already been figured into the meal per diem and are not reimbursed as separate expenses. The term "incidental expenses" includes laundry, cleaning and pressing of clothing and tips and gratuities.

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1 Excerpted from http://ba.uoregon.edu/staff/travel
**Business Purpose**

All Travel Reimbursements/Payments must include a business purpose. The nature of the business needs to be described in detail for each destination. IRS defines purpose as "Business purpose for the expense or the business benefit gained or expected to be gained". Descriptions should give enough information to determine the benefit. Inadequate Descriptions:

- Attend Conference
- Research
- Book Research
- Collaboration
- Meet with Colleagues
- Site Visits
- Give a lecture
- Speaker

Adequate Descriptions:

- Attend Annual American Solar Scientists Conference
- Interview Candidate
- Prospective Ph D Candidate
- Speaker for April 5 Symposium
- Research for Brain Imaging Project
- Give Lecture on Economic Trends in Oregon
- Research for book on French influence in NW. Reviewed museum documents
  
  &

- Collaborate with Jane Jones at USC about Title IX impact on PAC 10 athletes for upcoming paper.
Meals

Meal and incidental expenses are reimbursed at per diem rates. Meal expenses may be reimbursed only if the traveler qualifies for lodging expense reimbursement and the meal has not been provided by the conference/meeting or hotel. If the traveler stays in a Bed & Breakfast, breakfast per diem would not be an allowable expense. Continental breakfast is not considered a meal. **One day trips.**

On the day the trip begins, the traveler is eligible for 100% of the per diem if the trip begins before 7am.

On the day the trip begins, the traveler is eligible for Lunch & Dinner if the trip begins between 7am and 12:59 pm.

On the day the trip begins, the traveler is eligible for dinner if the trip begins at 1pm or after.

On the day the trip concludes, the traveler is eligible for 100% of the per diem if the trip concludes at 6pm or after.

On the day the trip concludes, the traveler is eligible for Breakfast & Lunch if the trip concludes between 12 noon and 5:59pm.

On the day the trip concludes, the traveler is eligible for Breakfast if they return prior to 12 noon.

For the day the traveler returns from a trip, the per diem rate specified for the last location where the traveler stayed overnight is used.

When traveler is in more than 1 city per day, the meal per diem paid is for the city in which they spend the night.

*Travel Reimbursement Rates for meals from Jan. 1, 2010 and after are shown below:*

<table>
<thead>
<tr>
<th>Category</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Cities</td>
<td>$52.00</td>
</tr>
<tr>
<td>High Cities</td>
<td>$65.00</td>
</tr>
</tbody>
</table>

*Travel Reimbursement Rates for meals from Nov. 1, 2005 to Dec. 31, 2009 are shown below:*
Low Cities $45.00
High Cities $58.00

The breakdown for specific meals is as follows:

25% of the per diem for breakfast
25% of the per diem for lunch
50% of the per diem for dinner

Related Links:

U.S. States & Territories
International
High City List
Banquets or special meals served at conferences
Hosting/Food & Beverage

If an exception has been made to pay actual for lodging at a conference hotel, then the meal per diem per day would be $58.00 even if staying in a low city. Documentation of conference hotel is required.

There are two options for a traveler to be reimbursed for someone else's meals:

(1) The traveler may pay for the meals directly and provide receipts for the actual expense up to a maximum of the allowable per diem for the meal(s). (2) The traveler may give the individual cash up to the allowable per diem. This is required to be documented by a signature sheet. The person that received the money has to sign the sheet and fill in the amount they received to make it valid.

A traveler may not claim per diem for someone else.

One day trips
The IRS considers breakfast and dinner allowances, figured on the basis of hours worked (such as those permitted below) to be taxable to the employee. If such breakfast and dinner allowances are paid, account code 28502 - Overtime Meal Allowance - must be used. Meals on one-day trips cannot be reimbursed to a non-employee.
When a traveler departs and returns the same day, meal expenses are reimbursed only in the following cases:

- When an employee leaves their official station two or more hours before their regular work shift, they are eligible for breakfast per diem.
- When an employee returns to their official station two or more hours after their regular work shift, they are eligible for dinner per diem.

Lunches on one day trips are reimbursed only in the following cases...

- When traveling as an OUS Board member or unpaid member of an advisory committee.
- 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. Receipt and documentation required.
- When directed or required to attend mealtime business meetings, including community or public relations meetings. Receipt and documentation required.
- Trips by athletic teams and student groups. Receipt required.
Lodging expenses are normally eligible for reimbursement when it is determined that the traveler would not reasonably be expected to return to his or her residence between work shifts. The maximum allowable lodging rate is generally the per diem rate plus tax when staying in commercial lodging facilities. Lodging tax should be listed as a miscellaneous expense unless an exception is made to pay actual at a conference/meeting hotel. Tax should then be included in the daily amount listed in the itinerary section. Lodging tax cannot be listed as a miscellaneous expense on foreign travel.

Reimbursement for all lodging expenses will be reimbursed at actual cost up to the current per diem rates. Original, itemized hotel receipts are required and must show the following:

- Traveler’s name (or names if reimbursement is being claimed for more than one University employee)
- Date(s) occupied
- Actual rate charged per room
- Indication that the amount submitted for reimbursement has been paid in full

Exceptions to the current per diem limit (e.g. conferences) may be reimbursed at actual and reasonable cost with the appropriate documentation.

On a case by case basis, exceptions will be made for travel to remote or non-standard locations, both domestic and foreign. Please contact the BAO Travel Office for assistance.

When staying in non-commercial facilities (family, friends, camping etc.) the maximum per diem allowed is $25.00 per night. No overnight lodging will be reimbursed if the traveler’s home base is within 50 miles. Exceptions only with justification.

A traveler can be reimbursed for someone else’s lodging if they have a receipt. They can be reimbursed up to the per diem amount or the actual if it’s a conference/meeting. If the receipt is not in the traveler’s name they will need to provide proof that they paid for the lodging. Lodging for another person should be
listed in the other expenses section of the reimbursement.

Non-commercial Lodging per diem is $25.00

Travel Reimbursement Rates for Lodging from Jan. 1, 2010 and after are shown below:

<table>
<thead>
<tr>
<th>Cities</th>
<th>Amount</th>
<th>Plus</th>
<th>Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>$111.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>High</td>
<td>$193.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Travel Reimbursement Rates for Lodging from Jan. 1, 2009 to Dec. 31, 2009 are shown below:

<table>
<thead>
<tr>
<th>Cities</th>
<th>Amount</th>
<th>Plus</th>
<th>Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>$113.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>High</td>
<td>$198.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Travel Reimbursement Rates for Lodging from Jan. 1, 2008 thru Dec. 31, 2008 are shown below:

<table>
<thead>
<tr>
<th>Cities</th>
<th>Amount</th>
<th>Plus</th>
<th>Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>$107.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>High</td>
<td>$179.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Related Links:

**U.S. States & Territories**
International High City List

Qualified Oregon Lodging Establishments
This list is provided as a guide to be used when making your lodging reservations for travel in the State of Oregon. Because this list was designed with State of Oregon agencies being the largest user, you will find per diems listed that are not relevant to the University of Oregon. Click on the following web address for the information and list.  
DAS Information Regarding Qualified Lodging Establishments
Transportation

Airfare that is purchased from someone other than one of the contracted travel agencies can be reimbursed. This includes airfare purchased from any travel agency, directly from the airlines, or from an internet site. If a traveler purchases the ticket directly, they cannot be reimbursed until the trip is complete. Original receipt is required.

If the traveler is seeking reimbursement for airfare, the passenger receipt coupon portion of the airline ticket should be attached to the travel reimbursement. Receipt must show traveler's name - itinerary/dates of travel, amount traveler paid. The UO will not reimburse for tickets purchased using frequent flier miles. All employees are required to travel using routes, schedules and airlines that provide the lowest rates and most efficient travel. If the traveler is combining personal travel with business travel, a comparison airfare quote is required.

When driving a private car out of state for personal reasons (i.e. including vacation), claiming "airfare in lieu of mileage" may be the most economical and should be used. Get a quote for airfare for the cheapest fare to the business destination and compare to the mileage. List "airfare in lieu of mileage" in the other expenses section with an explanation.

Private car mileage of 10 miles each way is allowed to and from the Eugene airport. If a family member has to take the traveler to the airport, a round trip of 20 miles can be claimed on the beginning and ending day of the trip.

Air Travel Requirements

All employees are required to travel using routes, schedules and airlines that provide the lowest rates and most efficient travel.

When combining personal travel with business, ONLY the business portion can be paid by the UO. Any personal portion of the airfare will have to be paid by the traveler at the time of ticket purchase. When to get a comparison airfare quote. First class airfare is not allowed under any circumstances.

At the UO four ways exist to purchase transportation services such as air, train,
and bus fares.

**Contract Travel Agencies** The UO has contracted with four local travel agencies for travel services. In addition, there is one agency that has a contract with the State of Oregon. These agencies will bill your department index for all charges. They are also the only place you can purchase city pair fares. These state contract rates might offer a lower fare particularly if your reservation does not include a Saturday night stay or if you are booking on short notice. Airfare Authorization Form Required, Airfare Authorization Form Example.

Travel administrators authorized to purchase airfare from the contract travel agencies may fax the Airfare Authorization Form to the agency. A copy is then faxed to Travel Office 6-8078 for reconciliation purposes.

Travel administrators not authorized to purchase airfare from the contract agencies should fax the Airfare Authorization to the Travel Office 6-8078 by 4 pm the same day the reservation is made. The Travel Office will authorize the airfare and fax the form to the agency.

When a trip has been canceled and an airfare authorization form has been submitted, the Travel Office should be notified of the cancellation. Send a copy of the authorization form to the Travel Office with "canceled" written across the face of the form.

**UO Procurement Card** When department policy allows, the UO Procurement Card may be used to purchase common carrier fares including air, train, and bus fares. This does not include taxis and airport shuttles. You may make these purchases anywhere that will accept a Visa card. There are both advantages and disadvantages to this type of purchasing method. See Internet Airfare Purchases for more information.

If you use the department procurement card, you will be required to do a journal voucher when the charges clear, to move them to the appropriate travel account code. For more complete instructions on Procurement Card Purchases see Procurement Card Program.
PLEASE NOTE: If you use your UO department procurement card to purchase airfare, the traveler will not have travel insurance coverage. Travel Insurance is only provided when using one of the 4 contracted travel agencies, UO Central Travel System (CTS) card, or the UO Corporate Travel card. Some personal credit cards may also provide travel insurance. You will not be reimbursed for any insurance that you purchase.

If not using one of the contract travel agencies:

The Airfare Authorization Form is not required
All purchasing or procurement card rules apply
When driving a private car out of state for personal reasons (i.e. including vacation), claiming "airfare in lieu of mileage" may be the most economical and should be used. Get a quote for airfare for the cheapest fare to the business destination and compare to the mileage. List "airfare in lieu of mileage" in the other expenses section with an explanation.

Frequent Flyer Miles
The UO will not reimburse or trade tickets purchased using frequent flier miles.

UO Unused Airline Tickets
This procedure provides guidance to departments in the accounting of unused tickets. On occasion, UO employees will make airline ticket reservations and subsequently not use the tickets for various reasons (e.g., family illness). Some tickets are refundable or reusable while others are not, so the procedure for receiving credit for tickets will depend largely on the method of payment that was used to purchase the ticket. Below are some guidelines for departments to follow when requesting refunds/credits of unused tickets.

1) Ticket purchased through a Contract Travel Agency

The department should contact the travel agency as soon as they know the ticket will not be used. The Travel Agency will identify the available options. Refunds will be posted to the UO account that was used to purchase the ticket.

2) Ticket purchased using UO Procurement Card
The department should contact the vendor where the ticket was purchased (i.e., airline, travel agency, other) to determine if the ticket is refundable, or reusable. NOTE: Typically, tickets purchased on the internet from third party vendors (travel sites such as Travelocity.Com or Priceline.Com) are not refundable or reusable. If the ticket is refundable the credit should be applied to the procurement card. If the ticket is reusable, the department will need to track the ticket for future use. Paper tickets must be obtained from the traveler and maintained by the department. Tickets purchased by the University are university property.

3) Tickets purchased using an employee's personal credit card

The department should contact the vendor where the ticket was purchased (i.e., airline, travel agency, other) to determine if the ticket is refundable, or reusable. NOTE: Typically, tickets purchased on the internet from third party vendors (travel sites such as Travelocity.Com or Priceline.Com) are not refundable or reusable. If the ticket is refundable the credit should be applied to the employee's personal credit card. In some instances the vendor will charge a fee. The employee can submit a travel reimbursement request for reimbursement of this fee. A hard copy of the receipt will be necessary in order to receive reimbursement.

If the ticket is not refundable, the traveler may submit a travel reimbursement request for reimbursement of the ticket. This request requires Department Head or designee approval before being reimbursed. A hard copy of the receipt will be necessary in order to receive reimbursement.

If the ticket is reusable, the traveler may submit a request for reimbursement, however, the department must track the unused ticket for future use. Paper tickets must be obtained from the traveler and maintained by the department. Once an unused ticket is reimbursed by the University it becomes university property.

Mileage

Mileage expenses for the most direct, usually traveled route, while traveling on official University of Oregon business, may be reimbursed at the following rates.
Use standard mileage guides, MapQuest or odometer readings. Odometer readings must be documented with a mileage log.

Jan. 1, 2010 - 50 cents per mile.
Apr. 1, 2008 thru Jul. 31, 2008 - 50 1/2 cents per mile.

When using odometer readings, substantial deviations from the standard mileage guides must be explained. For example, a detour that adds otherwise unexplainable miles to a trip (due to accident on I-5 travel was routed via I-205). Generally all trips start at the employee's official work station because this is usually the shorter distance. All mileage amounts have to be shown in the mileage column of the travel reimbursement including local mileage. Local/vicinity mileage should be separated from highway mileage. Include a statement such as "accumulated 35 miles in local/vicinity miles" while in Portland for a Leadership Conference.

Employees authorized to use their private vehicles for official business are required to have personal automobile liability insurance to provide the primary coverage for any accidents involving that vehicle. State-provided automobile liability coverage will apply on a limited basis after the employee's primary coverage limits have been used. The state does not provide physical damage, uninsured motorist and personal injury protection for personal vehicles. For additional information contact Becky Adair, UO Risk Director, 346-8316.

Driver Certification

UO Business Travel Itinerary
When driving a private car out of state for personal reasons (i.e. including vacation), claiming "airfare in lieu of mileage" may be the most economical and should be used. Get a quote for airfare for the cheapest fare to the business destination and compare to the mileage. List "airfare in lieu of mileage" in the other expenses section with an explanation.

Personal expenses such as private vehicle repair and maintenance will not be reimbursed.
Mileage expenses will not be reimbursed on a borrowed vehicle. Gas receipts would be appropriate in these instances.

Mileage for personal reasons or entertainment when on travel status will not be reimbursed.

Private car mileage of 10 miles each way is allowed to and from the Eugene airport. If a family member has to take the traveler to the airport, a round trip of 20 miles can be claimed on the beginning and ending day of the trip.

Callback mileage paid to classified staff in accordance with the Collective Bargaining Agreement, Article 30, Section 5 is considered taxable to the employee by the IRS. Mileage paid for this reason should be labeled as callback mileage either in the Business Purpose/Notes or the Mileage Notes section of the electronic travel form. The amount reimbursed will show as a taxable amount on the employee's earnings statement within one-two months of the travel reimbursement.

**Vehicle Rental**

Vehicle rental expenses such as cars, boats and aircraft may be reimbursed when regular means of transportation are unavailable or inappropriate for the particular use. Generally rental cars are not necessary when staying at a conference hotel. Receipts are required and a business purpose should be clearly documented for all rentals. Economy or Compact rate is normally required.

Exceptions include:

- Three or more persons riding in the vehicle
- The State of Oregon Enterprise/National or Hertz Contract is used (intermediate size allowable)
- Transporting large amounts of business equipment
- Severe weather conditions
- Medical conditions - contact the UO Travel Coordinator.

The vehicle rented should be the most economical that meets the business need. The reason for the exception must be documented on the travel reimbursement.
When combining business travel with personal travel the car rental will have to be prorated. The easiest way to do this is to divide the total dollars by the number of total days. This will give you the daily total that you can reimburse for each business day.

Travelers cannot be reimbursed for mileage on a rental car, but gas reimbursement would be appropriate.

The State of Oregon has contracts with Enterprise/National/WeCar and Hertz that are available for use by the University of Oregon. When these contracts are used, the car rental agencies will take full responsibility for the entire risk of loss or damage to the rented vehicle. They also allow drivers age 18 and older to drive without adding a minimum age surcharge to the rental.

Departments should take advantage of these contracts and use them when a rental vehicle is necessary. These contracts are for use by UO employees or students only, who are on “Official UO Business”. Contractors, speakers, lecturers, visitors, etc, may use these vendors for their rental needs, but they are not eligible for the contract rates or insurance coverage. Independent contractors are responsible for their own insurance. This applies whether or not you are paying the contractor for their services. If employees are combining personal time with business, they are not eligible to receive the contracted rates. Please see the Enterprise/National FAQ’s for options on personal rentals.

**Enterprise/National Car Rental Contract**

The corporate account number of XZ46WOR must be used when making your reservations. If this number is not used you will not be eligible for the contract rates and the insurance will not be included. There is also a PIN number that must be used if reservations are made online. Check with your department travel person for this code or call the BAO Travel Office.

If your department would like to have direct billing set up, please email requests to davion.l.leese@ehi.com.

[Enterprise National Rates](#)

[Enterprise/National FAQs](#)
Enterprise FAQs Current Users

Hertz Car Rental Contract
The corporate account number of 1485589 must be used when making reservations. This number is specific to the University of Oregon. If you want to enroll online for the Gold Online, the promo code needed is 9242.

If your department would like direct billing for Hertz, email requests to cweir@hertz.com or call 503-626-5156.

Hertz Rates and Overview

Insurance on Rented Vehicles
The state provides coverage for rental vehicles if they are to be used for official business. At the time of rental the employee or agent should purchase the Limited Damage Waiver (LDW), also known as Collision Damage Waiver (CDW) if it is available.

The following methods already provide LDW insurance coverage and in these instances LDW should not be purchased.

- Renting with the corporate travel credit card (cardholder only) or
- Renting under one of the state's contracts with Enterprise or Hertz.

The cost for the LDW is reimbursable. Other types of insurance are not. If a rental vehicle is to be used for a mix of personal and business purposes, LDW insurance will be reimbursed for the business portion only. Independent contractors are responsible for their own insurance. If an auto rental company in the US or Canada requests a certificate of insurance, contact Becky Adair, U of O Risk Director at 346-8316. If there are plans to travel outside the US, US territories and possessions, and Canada, the department should contact Becky Adair for help in obtaining the appropriate coverage.

Accidents
The renter of a vehicle involved in an accident, must report the accident within 24 hours to Deb Donning, Office of the General Counsel, via email: djm@uoregon.edu or phone (541) 346-3013.
Conferences

When combining personal travel with U of O business travel, payment will be based on the least expensive and reasonable means of transportation, and the meal and lodging per diem to which the traveler would have been entitled to while traveling. Payment will be made for only the period during which the traveler would have been in travel status on official business. This is generally one day before and one day after the dates of the conference/meeting. No payment will be made for vacation days. Expenses associated with an employees family and friends that travel with the traveler, are not reimbursable. Sight seeing costs are also considered a personal expense and will not be reimbursed. Travel reimbursements must have a copy of the conference/meeting brochure attached showing the agenda, dates of the conference/meeting and what was included in the conference i.e. meals/banquets. In addition, the IRS states that the convention/conference/meeting agenda or program generally shows the purpose of the conference. The brochure shows that attendance at the conference benefits the individual's official duties and responsibilities of their position. If this is not obvious, state the benefit or role. For more information see the Business Purpose Section. Meal per diem may not be claimed if a meal is provided at a hosted function such as meals included in the conference registration fee. If an exception has been made to pay actual for lodging at a conference hotel, then the meal per diem per day would be the high city rate even if staying in a low city. Documentation of conference hotel is required.

Banquets or special meals served at conferences that are in excess of the per diem are an allowable expense. Documentation, such as the brochure or registration form, must be attached verifying the meal expense and a receipt showing it was paid. The maximum allowable lodging cost is generally the per diem rate plus tax. Exceptions for conferences & meetings may be reimbursed at actual and reasonable cost with appropriate documentation such as a conference brochure that shows the conference hotel, the lodging rate assigned to the conference, and a lodging receipt that shows the amount paid. Exceptions other than conferences or meetings should be rare. Lodging tax should be included in
the daily total. Most conference registration fees are paid in advance to the conference rather than being paid by the individual. However, if the fee is paid by the individual, they cannot be reimbursed until the travel is complete. At that time the conference registration fee may be included in the travel reimbursement. Documentation for registration fees include conference brochure and/or registration forms identifying the applicable costs and something that shows it was paid. Social/recreational activities associated with a business conference are usually not reimbursable or payable If you think a social activity is applicable and should be reimbursed write a justification and submit it with the reimbursement.
Sabbatical or Other Leave

As a general policy, the use of university funds for travel while an employee is on sabbatical or other types of leave is warranted only in exceptional circumstances. If you are planning a trip while on sabbatical/leave you should seek your Dean's/Director's office approval and then the Vice Provost of Academic Affairs approval prior to the trip. The written request for approval must include the following:

- Name of individual on leave.
- Home department of faculty member.
- Dates of travel
- Destination
- The circumstances justifying the expense from U of O funds and purpose of travel.
- The source of funds (state, contract, grant, gift etc).
- The benefit the U of O will get from this trip.
- The estimate cost of the trip.

If the trip is approved, a copy of the approved letter must be attached to any payments or reimbursements that are submitted.

Sabbatical Travel Approval Request Form

CAS Guidelines for Sabbatical Supplements²

TRAVEL:

FASOM 11.01: “Reimbursement for travel expenses incurred during sabbatical or other types of leave is warranted only in exceptional circumstances.”

According to UO policy, all travel (transportation, meals, lodging and miscellaneous) has to be pre-approved by the VP for Academic Affairs, and, when grant funds are involved, by the Research Office as well. All such requests have to be submitted to the CAS Dean’s Office first for approval.

² Excerpted from https://casweb.uoregon.edu/s/Policies/anon/Faculty/sabbaticalsupplements.htm
Transportation:
Reimbursement for transportation for professional travel from outside funding sources (as defined above) should follow the guidelines of the granting agency.

Reimbursement for transportation for professional travel from other UO funds should be allowable to a reasonable degree and as necessary depending on availability of funds. For example, transportation to and from a professional meeting during a sabbatical should generally be approved. Transportation to and from a temporary residence to conduct research during the sabbatical should generally also be considered allowable. Commuting expenditures to and from a temporary residence to a place of research should be allowed only in exceptional circumstances, unless those expenditures are incurred at the request or convenience of the institution.

Meals and Lodging or Per Diem:
Reimbursements for meals and lodging or per diem from outside funding sources (as defined above) should follow the guidelines of the granting agency.

Full reimbursements for meals and lodging or per diem from UO funds are generally allowable for short periods of time only. For example, if the faculty participates in a short (up to one week) professional conference or meeting, meals and lodging may be reimbursed. Living expenses incurred during a prolonged stay at a temporary residence away from home may be reimbursed on a reduced basis. The number of days reimbursed should typically decline with the length of stay, reflecting the extended nature of the stay and the mix of professional and personal activities over the period. There may be exceptional circumstances that do not fit the suggested schedule below and meals and lodging or per diem for each day of the stay away from home may be reimbursed at the discretion of the VP for Academic Affairs.

Requests for reimbursement of actual expenditures will be limited by the allowable per diem reimbursement.

1) Guidelines for reimbursement % depending on length of stay:
per diem may be reimbursed for up to *

<table>
<thead>
<tr>
<th>length of stay</th>
<th>length of stay in days</th>
<th>reimbursement max</th>
<th>max reimbursement for maximum stay</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 week</td>
<td>up to 7 days</td>
<td>100%</td>
<td>$1,400</td>
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<td></td>
<td></td>
<td>(100%<em>7 days</em>$200)</td>
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<tr>
<td>2 weeks</td>
<td>up to 14 days</td>
<td>85%</td>
<td>$2,590</td>
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<td></td>
<td>($1,400 plus 85%<em>7 days</em>$200)</td>
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<tr>
<td>Duration</td>
<td>Days</td>
<td>Day Range</td>
<td>Percentage</td>
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<tr>
<td>1 month</td>
<td>up to 30 days</td>
<td>day 15 - 30</td>
<td>75%</td>
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<tr>
<td>3 months</td>
<td>up to 91 days</td>
<td>day 31 - 91</td>
<td>67%</td>
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<tr>
<td>6 months</td>
<td>up to 183 days</td>
<td>day 92 - 183</td>
<td>50%</td>
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<tr>
<td>9 months</td>
<td>up to 273 days</td>
<td>day 184 - 273</td>
<td>25%</td>
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</tbody>
</table>

($2,590 plus 75% * 16 days * $200)

($4,990 plus 67% * 61 days * $200)

($13,123 plus 50% * 91 days * $200)

($22,323 plus 25% * 90 days * $200)
Miscellaneous

Necessary business related travel expenses are normally eligible for reimbursement. Personal expenses are not reimbursed.

Expenses normally eligible for reimbursement are as follows:

- ATM cash advance fees and the cost of purchasing traveler's checks.
- Visa and passport expenses when necessary for business travel.
- Taxi/Limo fares are allowable but must be itemized by date and destination.
  - Tips are not reimbursable on taxi fares.
- Airline baggage fees - requires explanation.
- Bridge/ferry tolls and parking fees but must be itemized.
- Phone calls are an allowable expense. Business calls are unlimited but must be itemized by date and who called. Personal calls are not allowed except one phone call home every other day to check in with family. These phone calls must also be itemized and have to be a reasonable amount and length of time.
- Airfare change fees are reimbursed if the change was made for business reasons. Must be explained in the miscellaneous section and requires a receipt.
- Emergency purchases of materials and supplies such as office supplies, copies, faxes, postage etc, but have to be itemized and are separated by account code 28994 in the lower accounting section because they are not considered a travel expense.
- LDW on car rental

Expenses not reimbursed are as follows:

- Home to office travel.
- Deviations from the most direct and usually traveled route unless justified.
- Expenses incurred because the traveler was accompanied by a spouse or family members.
- Insurance on airfare.
- Tips/gratuity
- Laundry
- Interest on personal credit cards.
Receipts
When a receipt is required it has to be the original. Copies will only be allowed in rare instances. Credit card receipts are very seldom acceptable to use for reimbursement since they usually do not say what the purchase was. Small receipts should be taped (not stapled) to a larger piece of paper for imaging purposes. If a receipt is in a foreign language it is required that it not only be converted to US dollars, but translated to English also.

Receipts are not required for the following...

- Meals claimed at per diem rates
- Taxi, city bus, limos under $75.00
- Parking under $25.00
- Phone calls under $25.00
- Other miscellaneous travel expenses under $25.00

Receipts are required for the following...

- Airline baggage fees $25.00 and over
- Banquet or conference meals over per diem
- Airfare/Train/Bus (such as Greyhound)
- Conference registration
- Lodging
- Car Rental
- Taxi, city bus, limos $75.00 and over
- Parking $25.00 and over
- Phone calls $25.00 and over
- Miscellaneous travel expenses $25.00 and over
- Expenses for other people
- Expenses for supplies e.g. paper, books, film, etc