

UTMB – LOGISTICS ADMINISTRATIVE POLICY HANDBOOK

Section	1	Logistics Administrative Policies	Effective	05/01/2000
Policy	1.6	Employee Travel	Revised	01/01/2006 12/01/2007

Audience:

All Logistics employees.

Purpose:

To provide guidelines for approving and recording employee travel outside UTMB for:

- Training identified in the employee’s action plan for professional development
- Obtaining required certification
- Participating at an institutionally required meeting
- Performing duties normally required of the employee’s role
- Attending a conference or seminar

Policy:

Travel must be conducted in compliance with existing Federal, State, UT System, and UTMB travel policies and guidelines.

Employees who request funding for travel expenses must be familiar with the current travel guidelines and will be held accountable for compliance with all applicable policies.

Travel within the state of Texas must be approved in advance by the traveler’s supervisor. Electronic signature is sufficient. Registration fees in excess of \$250 associated with the trip must be approved in advance by a member of Logistics leadership.

Travel outside the state of Texas must be approved in writing in advance by Dr. Karen Sexton, VP & CEO for Hospitals /Clinics.

Definitions:

Work week – Monday through Friday for the purpose of recording employee travel.

Work day – Standard approved work hours per employee schedule for the purpose of recording travel.

Supervisor – term used by HR to indicate someone with direct reports. In Logistics it means individuals in the following Logistics roles with direct reports and responsibility for participating in the performance and disciplinary processes:

- Director
- Leader
- Manager
- Supervisor

Approved by Leadership: _____

Date: _____

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Procedure – before the trip:

The employee is responsible for:

- Submitting a Service Request for travel arrangements, with the option of attaching the 'Request for Pre-Travel Registration and Reservations' form found in the SAS forms library.
- Indicating destination, travel dates and preferred travel times.
- Including the cost of a registration or other fee, whether it is to be paid to the vendor or by the employee, travel needs such as airfare, hotel or rental car, parking, mileage to and from the airport, and the purpose of the travel.
- Obtaining the State of Texas Hotel Occupancy Exempt form to present at the time of check-in at the hotel if the travel is in the state of Texas and includes hotel reservations (travel with an overnight stay). NOTE: Without this form the traveler will be charged but not reimbursed for the state portion of the hotel tax. The traveler will be charged and reimbursed for county, city and local hotel taxes. All hotel taxes outside the state of Texas are reimbursable.
- Requesting a travel cash advance if needed. SAS will provide a copy of the PeopleSoft Travel Authorization in approved status upon request. The employee should submit the Travel Authorization and the completed Cash Advance form to Finance – Travel. SAS will assist upon request.

Procedure – after the trip:

The employee is responsible for:

- Submitting a Service Request for reimbursement, with the option of attaching the 'Employee Reimbursement for Travel Expenses' form found in the SAS forms library.
- Stating actual expenses incurred during the trip.
- Submitting original itemized receipts as specifically required by the UTMB Travel Guide (Examples: hotel and rental car receipts). NOTE: a) Expense types or expense amounts that are not within the normal ranges for travel require leader review and approval. b) Logistics will not reimburse food in excess of the per diem rate. Hotel and food are reimbursable only with an overnight stay per UTMB travel policy.
- Submitting the airfare e-ticket/itinerary even if the airfare is not employee paid.
- Returning any unused portion of a travel cash advance directly to Finance – Travel.

Consequences:

An employee who does not submit the required documentation for a reimbursement request or submits a reimbursement request for a non-reimbursable expense per the UTMB Travel Guide will not be reimbursed by Finance – Travel for that item.

References:

Logistics Policy 1.2 Attendance

UTMB Travel Guide (<http://www2.utmb.edu/finmgmt/policies.htm>)

UTMB Institutional Handbook of Operating Procedures:

Fiscal Policy 4.3.1 Travel Policy