

UNC Asheville
Academic Affairs
Travel Guidelines
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OSBM Budget Manual http://www.osbm.state.nc.us/files/pdf_files/BudgetManual.pdf
UNC Asheville Travel Policies and Procedures <http://www.unca.edu/policies/3.pdf>.

Introduction

The Travel Guidelines have been assembled to help you navigate the State and UNC Asheville policies and procedures regarding “business travel”, especially in terms of authorization to travel and reimbursement.

Travel policies and procedures at UNC Asheville require compliance with state policy, state law, and federal law. They are standards by which universities’ compliance with state and federal standards in general are gauged. Therefore, adherence to travel policies and procedures reflects on your unit’s and the University’s fiscal integrity.

With that in mind, it is important to remember several principles about business travel:

1. When you travel on business on behalf of UNC Asheville, you are a public servant, and you should demonstrate good stewardship of University resources.
2. Travel plans should be approved in advance of the trip. This is basic budget management to ensure that departments can actually cover expenses and are using their resources optimally. There are fewer than a dozen “emergency” trips during a year at the University as a whole. Remember that lack of planning does not constitute an emergency.
3. Original receipts are required so that both federal and state authorities can ensure that business expenses are not claimed on individual tax returns or reimbursed more than once. If the original receipt is not marked “paid” or does not show a zero balance, corroborating documentation such as a credit card statement must be provided to substantiate travel expenses. The same reasoning holds true for original signatures, when required.
4. Reimbursement for travel expenses paid from personal funds cannot be made prior to your trip.
5. Reconciliation of travel expenses should be done within thirty (30) days of the return date. Travel reimbursement forms submitted thirty-one (31) days or later after the return date cannot be processed.

Travel Procedure Statement

These travel procedures apply to the travel of all UNC Asheville Academic Affairs employees acting on official University business regardless of funding source. Portions of this procedure may also apply to individuals other than employees who are authorized to travel at University expense (i.e., University affiliates, nonemployees, students). Authorization for travel will be approved and expenses will be reimbursed only if the travel is made and reimbursement claimed in accordance with these procedures. [For student travel, please refer to the *Student Travel* and *Travel Awards* sections.]

Travel expenses for any individual not authorized to travel on University business will not be reimbursed.

These procedures and reimbursement rates are consistent with those of the State of North Carolina Office of Budget Management Manual (OSBM 5.0 Travel Policies and Regulations), North Carolina State Statutes G.S. 138-5, 138-6 and 138-7, and the Internal Revenue Service. Current reimbursement rates may be found at <http://finance.unca.edu/travel>. Only necessary and reasonable expenses above the authorized amounts per travel authorization may be reimbursed. Original receipts are required to claim reimbursement for all expenses, except where noted.

Travel Principles

Travel shall be consistent with the educational, research, and professional needs of the University, as well as the mission and goals of UNC Asheville.

As an agency of the State of North Carolina, UNC Asheville adheres to the NC State Budget Manual. IRS rules may also be applicable, as well as agency-mandated restrictions on federal grants.

Travelers conducting business on behalf of the University shall exercise good judgment and travel in a cost-efficient manner. Travelers shall conduct University business in compliance with applicable laws, policies and procedures and should be fully aware of all UNC Asheville travel policies and procedures.

Definitions of Travel Terms and Phrases

Approval Signatures

To be complete, all travel forms must be signed and dated by you, your supervisor or supervisor's designee, the fund manager(s), your Dean, and the Provost. All required signatures must be original. No other individual is authorized to sign for you. Rubber stamps, digital stamps, faxed signatures, copied signatures, or any variations thereof will not be accepted. Without the proper approval signatures, any expenses you incur will be your sole responsibility.

Direct Billing Accounts

UNC Asheville has accounts with specific vendors (AAA Carolinas, Enterprise, local hotels, etc.) for direct billing, which allow approved University travelers to utilize services without incurring out-of-pocket expenses.

Duty Station

Unless otherwise approved by the Provost and Vice Chancellor for Academic Affairs, each UNC Asheville employee's duty station shall be the main campus at 1 University Heights, Asheville NC 28804.

Funds

It is your responsibility to understand the constraints on or requirements for the designated fund used to pay for travel expenses. The final funding source documents must reach the Travel Office fully approved as required by the fund.

- If your direct supervisor is not the fund manager, the fund manager must also sign the authorization form.

External Conference (OSBM 5.8.1)

External conferences are those attended by employees from multiple North Carolina state departments, institutions or agencies. Payment for meals is allowable only if included in the registration fee. The fee must not consist exclusively of meals, or it will not be allowable – unless it meets overnight travel criteria. The registration fee typically includes the cost of speakers, building (room) use, handout materials, breaks and lunches at conferences and conventions. UNC Asheville requires itemization and documentation of expenses.

Internal Conference (OSBM 5.8.4)

Internal conferences are those attended by employees within single departments, institutions or agencies only. No payment for meals is allowable unless overnight travel criteria are met. A routine staff meeting is not an internal conference.

Official University Business Purpose

Official University business occurs when you or another person is traveling to attend approved job related training, work on behalf of, officially represent, or provide service at the University's request. This includes travel required by UNC Asheville to maintain or improve job skills that enhance your service to the University. This also refers to travel to perform services required for any sponsor, grantor or affiliate of the University pursuant to a research or other contract. Specific examples of University business purpose include, but are not limited to the following (OSBM 5.0.3 Official State Business):

- Employee attending continuing education conference, symposium or meeting related to the field of employment.
- Non-employee candidate for employment at UNC Asheville.

- Employees traveling on behalf of a research grant requiring the employee's presence in another location (e.g., water samples, surveys, etc.).
- Students working as employees when traveling as a duty of their positions (travel must be paid from the same source that pays the student's wages).
- Non-employee students who travel on official University business (can be paid from state funds; see Student Travel section for more details).

Training sessions and programs of a personal nature may not be paid for by University resources.

Original Receipt

An original receipt is a document issued by a vendor, detailing the cost for each good or service provided. The receipt must indicate the name of the vendor, the date of the transaction, and the method of payment.

Photocopies of receipts will not be accepted. The receipt must be the original that you received from the vendor.

The receipt must be itemized, listing what was purchased; it is your responsibility to request an itemized receipt if the vendor does not provide one.

The receipt must show how the expense was paid, whether by cash or credit card.

Subsistence

Reimbursement rates for lodging and meals are referred to as subsistence amounts by the state of North Carolina and are regulated by the state (OSBM 5.1.2). Per diem is an Internal Revenue Service term that is not used for travel allowances by the state of North Carolina (OSBM 5.1.1).

Travel Advance

Personal loan provided to you prior to the trip to cover out-of-pocket expenses while traveling.

Travel Prepayment

Money paid in advance to applicable vendors on your behalf.

Travel Status

You are considered to be in travel status whenever you're required to be away from your normal duty station in the performance of your job. (Motor Fleet Management Regulations, NC Dept of Administration, January 2003 I.C.4 <http://www.ncmotorfleet.com/documents/mfmregs.pdf>)

Travel Status-Overnight

You are considered to be in overnight travel status when your business activities require multiple days' absence from your duty station. OSBM 5.1.5 states that the travel destination must be at least 35 miles from the duty station or home, whichever is less.

Travel Authorization

Prior to any travel arrangements or commitments being made, travelers should prepare an [Academic Affairs Travel Authorization](#) form and submit it to his/her supervisor for approval. Additional signature approvals are required as noted on the form. Subsistence and mileage reimbursement rates can be found online at <http://finance.unca.edu/travel>.

Make sure you include all anticipated expenses. Remember, your travel reimbursement will be limited to the items listed and the total amount included on your approved Travel Authorization form.

Approved Travel Authorization forms must be retained in the department and attached to the Travel Reimbursement form prepared after the trip concludes. In the event that prepayments or a travel advance are needed, attach a copy of the Approved Travel Authorization form to each payment request and forward to the Travel Office for review and processing.

Employees are not permitted to make travel-related payments on behalf of guests, students or other employees, unless expressly pre-approved by the Provost and Vice Chancellor of Academic Affairs.

An employee's travel authorization does not cover guests, students, or other employees. Separate travel authorizations are required for each traveler, with the exception of faculty-led course field trips.

Travelers should complete a Travel Authorization form if any of the following apply:

- Travel is 35 miles (or greater) from your home, duty station, or the UNC Asheville main campus.
- Travel includes an overnight stay.
- Travel includes subsistence, such as meals or hotel charges (OSBM 5.1.2).
- Travel involves students (e.g. field trips).
- You would like to request a travel advance.
- You would like to request reimbursement.
- You would like to use a Fleet Vehicle.

Excess Lodging (OSBM 5.1.7)

Excess lodging authorization must be obtained in advance. Excess lodging is allowed when the employee is in a high cost area and unable to secure lodging within the current allowance, or when the employee submits in writing an opinion that his/her personal safety or security is unattainable within the current allowance. Excess lodging is not allowed for reason of convenience or personal preference of the employee. Lodging allowances that are not approved prior to travel on a Travel Authorization form will be limited to the state's subsistence rate. Any overage of lodging expenses will be denied or may be processed from the department's discretionary fund upon departmental approval.

Third Party Non-Commercial Lodging (OSBM 5.1.8)

Reimbursement for lodging in an establishment that is being rented out by a third party or an establishment treated as an apartment building by state or local law or regulation is not allowed unless approved by OSBM in advance (contact the Travel Office at least three weeks in advance for the form). Requests for third party lodging must provide evidence of savings to the state. Third party lodging agreements with family members are not allowed. An exception may be granted for requests that do not show a savings with sufficient justification to support the necessity for third party lodging.

Blanket Travel Authorization

Blanket Travel Authorizations are approved only under limited situations. UNC Asheville employees who frequently travel to local destinations in the course of their official duties may obtain a blanket travel authorization. A blanket authorization may be used by faculty leading course field work trips or observing student teachers.

To obtain a blanket travel authorization, you will need to list the anticipated dates of travel and destination(s) on the Travel Authorization form. A Blanket Travel Authorization extends for one semester. Requests for reimbursement shall be submitted monthly.

Documentation to Attach to Your Travel Authorization Form

Requests for travel authorization must be supported by available printed documentation (e.g., conference announcement, meeting invitation, agenda, schedule of events, course syllabus). The printed documents must cover "who-what-where-when-why":

- **who** is hosting the conference/meeting/event (full name along with any acronyms used)
- **what** is the conference/meeting/event title
- **where** is it being held
- **when** is it being held
- **why** you are going (agenda, schedule of events/sessions, "Schedule at a Glance", invitation to present, course syllabus)

Event/Activity	Documentation to attach to Travel Authorization form
Attending a conference, convention, seminar, or workshop	(1) announcement/brochure/flyer and (2) agenda/schedule of events
Presenting at a conference, convention, seminar, or workshop	(1) announcement/brochure/flyer, (2) agenda/schedule of events, and (3) invitation to present, if your name and topic are not listed on schedule
Training	announcement/brochure/flyer with description of curriculum
Off-campus meeting	(1) invitation and (2) agenda
Grant-funded fieldwork	sponsor approval: copy of applicable page(s) from proposal
Travel to research site not funded by grant	description of research work and reason for travel
Faculty-led course field trips	(1) course syllabus and (2) course roster

Revising Your Travel Authorization Form

You should revise and resubmit your Travel Authorization if:

- Additional information affecting travel dates, business purpose, or increase to estimated expenses becomes available after the original authorization was submitted.
- Additional advance or prepayment requests arise prior to travel departure or any prepayment deadlines.
- The funding source(s) supporting travel expenses changes prior to departure date.
- The total estimated cost increases prior to departure date.

To revise your authorization form, complete a new Travel Authorization form and staple the original signature-approved Travel Authorization (with documentation) to it.

All revisions must be signature-approved and dated by the approving authority found on the original authorization.

Cancellations (OSBM 5.1.9 penalties and charges)

If the event or meeting is canceled or you cannot attend the event for personal reasons, the Travel Office should be notified immediately. You should submit a copy of the signature-approved Travel Authorization marked "**CANCELLED**" in **red ink** or **HIGHLIGHTED** to note changes. You should initial and date the cancelled authorization. It is your sole responsibility to pursue refunds for any prepayments or direct billing agreements already processed.

If you were issued a travel advance, and the check has not been cashed, return the check to the Accounts Payable Office.

If you already cashed an advance check, it is your sole responsibility to return the funds to the Cashiers Office within one (1) business day of cancellation notification. You must inform the Cashiers Office of the fund and account number source(s) for the travel advance.

Any advance funds not returned to the Cashiers Office will be deducted from your salary.

If you cancel your travel or change your travel schedule for personal reasons, it is your obligation to pay the penalties and charges. *(Please note that in the event of accidents, serious illness, or death within the employee's immediate family or other critical circumstances beyond the control of the employee, the department may elect to pay the penalties and charges.)*

All refunds obtained as a result of prepayments are due to the University.

Travel Advances (NC OSBM 5.1.39)

Travel advances are *personal loans* from the State of North Carolina, issued by UNC Asheville. Advance funds may only be requested for group curriculum-related travel. Curriculum-related travel is defined as travel for which an authorized faculty member has an accredited course of study and is participating in a pre-approved activity with students requiring off-campus related travel expenses.

An approved Travel Authorization form must be attached to the Travel Advance form.

Travel advances are issued by check to the employee. Monies issued are available five (5) business days prior to travel departure date.

All travel advance monies must be accounted for and documented by original receipts, or repaid to the University, within thirty (30) calendar days from date of return from travel.

Prepayments

You may request that a vendor be paid for travel expenses prior to your departure. Pre-payments can be processed for airfare, hotel reservations, conference registrations, or to you directly for airfare. Pre-payments, like Travel Advances, are *personal loans* from the State of North Carolina, issued by UNC Asheville.

A copy of your approved Travel Authorization (including documentation) must be attached to each prepayment Check Request form (use for hotel, registration, airfare paid to agency) or Travel Advance form (use for airfare reimbursed to you):

- Check Request for hotel reservations, attach an invoice.
- Check Request for conference registrations, attach a copy of your registration form and an invoice, if one is provided by the conference host.
- Check Request for airfare payments to AAA of the Carolinas, see Direct Billing Your Flight section.
- Travel Advance for airfare reimbursement, attach your confirmation itinerary and your original receipt which indicates that you have paid in full.

Requests for hotel and conference prepayments must be received well in advance to give Accounts Payable sufficient time to process your request. This process may include contacting the hotel or conference host for verbal or written documentation required to set them up as a University vendor.

Direct Billing Your Airfare

Once your Travel Authorization is approved by the Provost, you may contact AAA of the Carolinas (1-800-765-6223) to direct bill your flight. After your reservation is processed, AAA of the Carolinas will email you a confirmation itinerary and invoice. Attach all pages of the AAA of the Carolinas invoice and itinerary to a completed Check Request form with copies of your approved Travel Authorization and documentation. Send the Check Request, itinerary/invoice, and authorization/documentation to the Accounts Payable Office for payment processing.

If you specifically request a paper ticket when you make your reservation, AAA will deliver it by courier to your department; otherwise, AAA of the Carolinas will email you an electronic ticket.

Reservations for other forms of transportation (train, bus, etc.) can be made through AAA of the Carolinas but not all services can be billed to the University. You may be asked to pay by credit card at the time the reservation is made; reimbursement for personal credit card payments can only be made after the trip.

Direct Billing Your Rental Car

If you need a rental car to drive from Asheville to your destination, an agency on state contract must be used. Enterprise holds the state contract. Once your Travel Authorization is approved by the Provost,

you may make rental car reservations with Enterprise. The Enterprise state contract has liability insurance coverage built into the pricing.

Enterprise will provide you with an invoice. Attach this invoice to a completed Check Request with copies of your Travel Authorization and documentation. Send the Check Request, invoice, and authorization/documentation to the Accounts Payable Office for payment processing.

The following travel expenses related to car rentals are not reimbursable by the University:

Collision Damage Waiver - Since the State of North Carolina is a self-insurer; this insurance coverage is not required for state employees. You will be covered in the United States and Canada. If you choose to pay for this type of coverage on your rental car, UNC Asheville will not reimburse you.

When traveling out-of-country, you may purchase this coverage and departments may reimburse you for the cost of insurance coverage on foreign car rentals. Before purchasing this coverage and when using a credit card, you should determine if the credit card company provides the necessary coverage as a card holder benefit.

Personal Accident Insurance – This is considered personal insurance. The University will not reimburse travelers choosing to pay for this coverage.

Travel Reimbursement

Pursuant to G.S. 138-6, requests for reimbursement shall be submitted to the Travel Office no later than 30 days after the travel period ends for which the reimbursement is being requested.

You should complete the [Travel Reimbursement](#) form if:

- A Travel Authorization form was submitted for this travel, and you requested reimbursement.
- You received a travel advance or prepayment for out of town travel, reconciling your original receipts with your travel advance/pre-payment.
- The trip is a one-day travel event that includes expenses for mileage and parking, meals, and/or registration.

NOTE: Employee must be in travel status (see [Definitions](#) for explanation of travel status).

The original Travel Authorization form with supporting documentation must be attached to your Travel Reimbursement form. Keep a copy for your record.

Documents submitted in support of travel reimbursements shall not be altered in any way. No reimbursement will be issued based on altered supporting documents.

Revisions

If you filed your travel reimbursement form and then found additional original receipts or expenses related to the trip, or if additional trip-related expenses were incurred and were not included on the original travel reimbursement, you may submit a revised travel reimbursement form to the Travel Office within 30 days after the travel period ends.

A copy of the original travel reimbursement should be submitted to the Travel Office, marked "**REVISED**" and include all revisions in **red ink** or **HIGHLIGHTED** to note changes. All revisions must be approved with signature and date by the approving authority shown on the original reimbursement (or his/her designee).

Getting Reimbursed For Registration Fees (OSBM 5.1.18)

You may be reimbursed for your conference registration fees after the conference has ended, as long as the fees are in conjunction with your official University business purpose. For example, you are eligible for reimbursement if you are attending a continuing education conference or representing UNC Asheville at a conference as a presenter. An original receipt is required for reimbursement.

Getting Reimbursed For Transportation (OSBM 5.1.20, 5.1.21, 5.1.26, 5.1.31)

For Travel by Plane

If you travel by plane for your trip, most of your expenses are reimbursable. In general, airfare is reimbursable at "Air Coach Rate" when the departure and return dates are within one (1) calendar day of the purpose of travel. Airfare for your travel outside the continental US is reimbursable when the departure and return dates are within a justifiable time period around the purpose of the travel. (If your travel is being supported by Federal funds, and your flight involves a foreign carrier from a US airport, please remember that you must comply with the [Fly America Act](#).)

If the purpose of your trip includes several business-related activities, you should include them all in your notation of business purpose. If you would like to combine personal and business travel, you may, but note that no prepayments will be issued for the personal portion of any trip. To obtain reimbursement for travel within the continental United States, you must show that you have not incurred extra expense to the University for the personal portion of the trip. You must provide printed documents from a travel agency, an online travel site, or from the actual airline, obtained on the same date as the purchased ticket. The documents must show that the price of the ticket for the extended stay is no more expensive than the price of the ticket to depart immediately before, or return immediately after, the reason for the business travel. If no documentation is available, your reimbursement will be prorated based on the number of days considered business travel. If you are traveling outside the continental United States and would like to combine personal and business travel, you must delineate all applicable travel costs between business and personal expenses. This includes airfare, parking, mileage, rental car, and any other common costs.

If you paid for your airfare, and would like to be reimbursed before you leave for the trip, you must attach an original receipt and trip itinerary and a copy of your completed Travel Authorization to a Travel Advance form.

To be reimbursed for airfare after you return from your trip, you should provide documentation (original receipt, itinerary, boarding passes, and authorization) along with your Travel Reimbursement Request and your original completed Travel Authorization form.

Baggage Fees

Travelers are encouraged to keep baggage fees to a minimum by traveling within the standard guidelines used by airlines. An original receipt is required for reimbursement of all baggage fees.

Parking at the Airport (OSBM 5.1.34, 5.1.35, 5.1.36, 5.1.37)

Parking at the airport is reimbursable. The IRS and the State Budget Manual require that expenditures be "judicious and reasonable." With this in mind, UNC Asheville will reimburse your airport parking expenses for a maximum of 48 hours at the maximum per day charge for airport business valet parking (the current rates range from \$7 to \$10 per day). Charges over and above the business valet parking charge will be your sole responsibility.

According to the State Budget Manual, OSBM Section 5.1.36, any parking rates considered excessive and only for the convenience of the traveler will not be reimbursable. An example of excessive or inappropriate parking would be the use of an airport's hourly parking lot for an overnight trip.

For airport parking reimbursement, you must provide an original receipt for any charges, showing method of payment and check-in/check-out dates and times.

Travel to/from Airport

For travel to/from the airport, mileage is allowed for a maximum of two round trips with no parking charge, or for one round trip with parking charges.

Mileage will be reimbursed for the closer of home or duty station.

If you choose to use a taxi to get to and from the local airport, you will be reimbursed up to a maximum of \$40.00 for round trip and a maximum of \$20.00 for one-way trips. An original receipt is required.

Travel by Train or Bus

Train and bus costs for transportation to your destination city are reimbursable when the departure and return dates are within one (1) calendar day of the purpose of travel. To be reimbursed after your travel is completed, you should provide an original receipt and the complete train or bus itinerary along with your travel reimbursement document and completed Travel Authorization form.

Ground Transportation

Allowable ground transportation expenses include:

- City/local subway, train, bus, taxi, or ferry.
- Rental car, if prudent.
- Parking (lots and meters).
- Highway/Interstate tolls.

You will be reimbursed only for transportation used to ensure that you arrive at your destination – not for personal preference or for tourist activities. Original receipts are required for reimbursement of ground transportation expenses.

Rental Car Gasoline

You may request reimbursement for gasoline purchased for a rental car. Original receipts are required.

Use of Motor Fleet Pool

All UNC Asheville employees with appropriate driving credentials have the opportunity to request a State vehicle from the University's Motor Fleet Pool when used for official University business. A copy of your approved Travel Authorization form must be attached to your Motor Fleet Request form available on the University's Public Safety <http://publicsafety.unca.edu/> website.

If Motor Fleet denies a request for a State vehicle, the denial form/email must be attached to your Travel Reimbursement forms in order to claim mileage at the federal rate. The denial must be in your name for the exact travel dates. Backdated denials will not be granted.

Most Motor Fleet vehicles come with gas cards, and there are generally no additional related out-of-pocket expenses. Motor Fleet will bill your department through an interdepartmental invoice for the use of the State vehicle, so you will not need to include any of these charges on your travel claim forms.

If the gas card does not work, and you have to purchase gasoline, turn your original receipt(s) into the Motor Fleet Office when you return. The Motor Fleet Office will process your reimbursement request for you.

Using Your Personal Vehicle for Business Travel

If you are using your personal vehicle on approved, official University business, you can be reimbursed for your mileage at the lesser of the state mileage rate <http://finance.unca.edu/travel> or airfare coach rate.

Mileage will be reimbursed for the closer of home or duty station to your destination.

For mileage reimbursement, you should include printed directions that show total miles incurred outside the Asheville area. You may use www.mapquest.com for this documentation. If your actual mileage exceeds direct round trip miles, please provide an explanation.

If a vehicle from the Motor Fleet is available, and you choose to use your personal vehicle instead, your personal vehicle mileage will be reimbursed at the state rate, not the federal mileage rate.

Ride Sharing

To minimize travel costs incurred by the University, travelers should only use the number of vehicles necessary to transport multiple business travelers to a common destination with reasonable regard for safety, comfort, and efficiency.

The precise number of vehicles that can be justified will vary according to type of vehicle available (e.g. van, sedan, station wagon); number of travelers; distance to be traveled; vicinity travel required at the destination; compatibility of travelers' departure and return schedules; and other pertinent variables. However, both the traveler and those who authorize the travel bear responsibility for assuring that the number of vehicles used and the expenses incurred reflect observance of the University policy stated above.

When multiple passengers undertake approved business travel in a private vehicle, only one may claim reimbursement for mileage.

Getting Reimbursed for Hotels and Lodging (OSBM 5.1.5, 5.1.6, 5.1.7, 5.10.1, 5.10.2, 5.10.3, 5.10.6)

To qualify for lodging reimbursement, the travel destination must be located at least 35 miles from the University (duty station) or your home, whichever is less. The State lodging rates <http://finance.unca.edu/travel> are the room rates before taxes.

Commercial Hotels

If you are required to be away from your home or duty station overnight for University business travel, your hotel accommodations (room and tax) are reimbursable. The hotel reservation dates must be within one (1) calendar day of the purpose of travel (example: conference, research time, etc). You may be reimbursed after your stay by submitting an original, itemized, paid hotel invoice (balance must be "zero") along with a Travel Reimbursement form and your completed Travel Authorization form. When using an online travel site, you must request a "stay" receipt from the hotel indicating check-in and checkout dates, to submit along with the online billing original receipt.

In order to claim reimbursement for additional charges incurred at the hotel, they should appear on your hotel invoice as follows:

- **Business Phone Calls** must appear on hotel invoice for reimbursement. Please indicate these calls as "business", and provide a brief statement on the purpose of the call. Business phone calls are not generally reimbursable for employees that have a University-owned mobile communications device or a mobile communications allowance.
- **Personal Phone Calls** must appear on hotel invoice and be noted as "personal" calls. For every two days are in travel status, you are allowed reimbursement for up to \$5.00 for personal calls.
- **Faxes & Copies** must appear on hotel invoice or other original receipt from hotel. You must include the reason and business purpose for faxes sent/received, or copies purchased.
- **Internet Connection Fees** must appear on hotel invoice or other original receipt from hotel.
- **Hotel Parking** must appear on the hotel invoice or other original receipt from hotel.

Non-Commercial Lodging Establishments (OSBM 5.1.8)

If you are staying in a rental or other non-commercial lodging instead of a hotel, you must get approval from the Office of State Budget and Management in advance. Please contact the Travel

Office three weeks prior to departure to obtain the required advance approval from OSBM. Without this approval, your lodging expenses will not be reimbursed. A signed rental agreement must be presented to receive reimbursement. Remember, third party lodging agreements with family members are not allowed.

Room Sharing

If one UNC Asheville traveler pays the full lodging expense for him/herself and one or more other individuals traveling on official state business with whom he/she shares a room in a commercial lodging establishment, the traveler bearing the expense should include the full lodging expense on his/her reimbursement request; attach copies of the approved Travel Authorizations of the other individuals.

A note of explanation should be included on each traveler's reimbursement request with a list of those sharing the room.

The total per night lodging charge will be divided by the number of state travelers sharing the room for purposes of applying the statutory limitation. As long as each traveler's share of the room charge is less than the allowable rate, no additional approvals are needed for excess lodging.

Subsistence (OSBM 5.1.10, 5.1.11, 5.1.12, 5.1.13, 5.1.17)

Subsistence is an allowance related to lodging and meal costs (including gratuities). UNC Asheville employees receive subsistence for full days of travel. In addition, employees receive allowances for meals and lodging for partial days if the travel involves an overnight stay and the partial day is the day of departure or the day of return. Meal allowances are based on three (3) conditions:

- 1) Actual departure and return times,
- 2) Overnight travel status, and
- 3) Location at the time of the meal expense.

Meals that are provided at the conference, research site, meeting, etc., cannot be claimed on the employee's UNC Asheville Travel Reimbursement form. Original receipts are not required for meals claimed at state subsistence rates <http://finance.unca.edu/travel>.

Out-of-country rates for lodging and meals are the same as out-of-state rates.

Regardless of destination (in-state, out-of-state, or out-of-country) the following conditions apply:

- Meal rates include taxes and tips.
- An employee may claim subsistence for breakfast when a continental breakfast is included in the registration/meeting fee.
- If the hotel provides a continental breakfast as part of the room rate, the employee may claim subsistence for breakfast; if the hotel provides a hot breakfast, no subsistence claim can be made.

Meals during Overnight Travel

An employee in overnight travel status on official state business may be reimbursed for meals including lunch. The travel must involve a travel destination located at least 35 miles from the employee's regularly assigned duty station (vicinity) or home, whichever is less, to receive approved reimbursement.

An employee in overnight travel status may be reimbursed for meals for partial days of travel when the partial day is the day of departure or the day of return. To be eligible the following criteria must be met:

- Breakfast - Depart duty station prior to 6:00 A.M. *and* the normal workday is extended by two (2) or more hours.
- Lunch - Depart duty station prior to Noon on day of departure *or* return to duty station after 2:00 P.M. on day of return.

- Dinner - Depart duty station prior to 5:00 P.M. on day of departure *or* return to duty station after 8:00 P.M on day of return *and* the normal workday is extended by three (3) or more hours.

Meals during Daily Travel

Allowances cannot be paid to an employee for lunches if travel does not involve an overnight stay. However, employees can be eligible for the breakfast and evening meal allowances when the following criteria is met:

- Breakfast (morning) – Depart duty station prior to 6:00 A.M. *and* the normal workday is extended by two (2) or more hours.
- Dinner (evening) – Return to duty station after 8:00 P.M. *and* the normal workday is extended by three (3) or more hours.
- The travel must involve a travel destination located at least 35 miles from the employee's regularly assigned duty station or home, whichever is less.

Tips (OSBM 5.1.3)

Tips under this section do not pertain to meals. Tips include gratuities for services rendered in which there are no associated costs (example: airport luggage service). When tips are claimed in excess of the guidelines below, they should be justified in writing and attached to the travel reimbursement form. The Travel Office takes into consideration length of stay, destination, service person receiving tip and the customary guidelines listed below. Excess tips claimed with no justification will be disallowed.

- \$1-\$2 per bag for luggage service at hotel or airport
- \$1-\$2 per bag for shuttle drivers
- \$1-\$2 for valet parking, where valet parking is the only option
- 15% of the taxi fare and \$1-\$2 a bag to taxi drivers

Reimbursement for Fees

- Currency Exchange Fees

When using a credit card abroad for allowable travel expenses, the credit card agency will generally charge a small fee for conversion of those funds. When submitting such travel expenses for reimbursement, you should attach a copy of the applicable credit card statement for reimbursement of currency charges. Reimbursable expenses would include foreign ATM fees.

- Visa/Passport Fees (OSBM 5.1.19)

When traveling abroad on official University business, the cost of obtaining applicable passport or Visa documents is an allowable expense. When claiming this expense on a travel reimbursement form, you should attach a copy of the visa or passport, original receipts from issuing authority or any other documentation that provides substantiation for reimbursement.

- Travel Agency Fees

When making travel arrangements via a physical or online travel agency, the agency may charge fees in connection with reservation services. These small fees will often be billed in the total amount of the reservation and *are* allowable expenses. The original receipt from the issuing agency should identify such fees; however, in cases where it does not, a copy of your credit card statement showing agency fee paid is required for travel reimbursement.

Books/Literature

Books or other literature purchased while in travel status may be considered allowable if (1) they remain in the possession of the University once travel is completed and when the employee has left the University, (2) they could not have been purchased prior, and (3) they are directly related to the employee's business purpose. Books purchased while in travel status are not considered travel expenses and should be claimed for reimbursement with appropriate original receipts on a Check Request form.

Unallowable Expenses

Even if original receipts are obtained and submitted, the following items cannot be reimbursed:

- Room service tips, valet tips, or other hotel services.
- Laundry services.
- Between meal snacks.
- Alcoholic beverages.
- Tours, entertainment, or other social activities.
- Flight insurance or personal accident insurance.
- Any expenses of a personal nature

Receipt Requirements Quick Reference

You must have original receipts to document all expenses, except where subsistence rates are claimed for meals. Please tape your original receipts to a piece of 8 ½ x 11 paper, which is then stapled to the Travel Reimbursement request. No paper clips, please!

Allowable Expense	Receipt Required	Additional Notes
Meals (Subsistence)	No	
Meals (non-employee)	No	
Taxi/Bus/Ferry/Tolls	Yes	
Rental Car	Yes	Rental agreement contract showing total cost and original gas receipts
Parking	Yes	Original receipt detailing check-in/check-out dates/times and payment.
Airfare	Yes	Original receipt must include itinerary details when purchased outside of AAA of the Carolinas. Boarding passes.
Hotel	Yes	Must detail room rate, room taxes on official hotel letterhead; no express checkout unless prepaid. Hotel statement must state amount paid and show a zero balance due.
Registration	Yes	If not prepaid, original receipt should include name of the conference, conference dates, and price of registration.
Tips	No	At reasonable rates - see <i>Tips</i> section.

Prospective Professional Employees (OSBM 5.7.2)

Reimbursement travel expenses to prospective professional employees visiting UNC Asheville for employment interviews are limited to transportation and subsistence for 3 days (5 days if one is a Saturday) at the in-state rate.

Candidate Interviews

If you are interviewing a professional job candidate and need to meet with him/her over a meal, please prepare a Check Request within thirty (30) days of this expense. Please note that:

- A copy of the candidate's interview schedule must be attached to your Check Request.
- An original receipt is required. Many restaurants do not provide itemized receipts, especially if you pay by credit card; those receipts will not be sufficient. Please remember that you may need to request an itemized receipt from the restaurant.

- Gratuity up to 20% on allowable expenses will be reimbursed.
- No reimbursement will be made for alcoholic beverages or tax associated with alcoholic beverages.

The Provost's Office will reimburse (from a trust fund) recruitment meals for the candidate and one faculty member. Others may attend, but their meals must be supported from other funds (e.g. personal or departmental trust funds).

Student Travel

(revised March 2013)

UNC Asheville complies with Federal and State Regulations regarding taxability of payments. Travel expense reimbursements from University funds to students may be taxed and reported on either a Form 1099 or Form W2 for tax purposes.

Reimbursement for Student Employee Travel (OSBM 5.7.3)

Occasionally, students are required to travel as employees of the University. These employees continue to be paid when traveling on University business. If their wages are paid from the same Banner fund(s) as the travel, it is assumed that the travel is required. These travel expenses are reimbursable tax-free to the student, at the State subsistence and mileage rates, but only when approved in advance, and when the University is the primary beneficiary of the travel. All University travel policies and procedures apply.

As with all University travel, a Travel Authorization form must be completed and approved prior to the student employee's trip departure. After the signature-approved Travel Authorization form has been returned, Pre-payment requests may be submitted to the Travel Office.

Reimbursement for Non-Employee Student Travel (OSBM 5.7.3)

Non-employee students who travel on official University business and whose expenses are paid or reimbursed from University funds are subject to all University travel policies and procedures. Travel expense reimbursements from University funds to students may be taxed and reported on either a Form 1099 or Form W2 for tax purposes.

Non-employee students who travel to fulfill a course requirement for academic credit and whose expenses are paid or reimbursed from University funds are subject to all University travel policies and procedures. Travel expense reimbursements from University funds to students may be taxed and reported on either a Form 1099 or Form W2 for tax purposes.

As with all University travel, a Travel Authorization form must be completed and approved prior to the student's trip departure. After the signature-approved Travel Authorization form has been returned, pre-payment requests may be submitted to the Travel Office.

Academic Course Field Trips

A Travel Authorization form must be completed and approved prior to any off-campus, faculty-led, student field trip scheduled for a course. One Travel Authorization form may cover all field trips scheduled for the course. A copy of the course syllabus and the class roster should be attached to the Travel Authorization form as documentation.

Academic Team Travel (Debate, Band competition, Quiz Bowl, etc.)

Before the trip, a Travel Authorization form must be completed. Reservations for hotel, flights and other activities should be handled on a group basis whenever possible.

Pre-paying expenses for conference fees, airfare, and lodging is advised (see section on *Prepayments*).

The group advisor is encouraged to obtain an advance to cover group meals (see section on *Travel Advance*), and is required to submit original receipts with a Travel Reimbursement Request form to support those expenditures.

Student Organization Travel

The Travel Office will process travel payments on behalf of the student organization. Depending on the circumstances of the travel, travel expense reimbursements from University funds to students may be taxed and reported on either a Form 1099 or Form W2 for tax purposes.

Travel Awards

Fellowships, awards, stipends, grants, scholarships, etc. are defined as financial support for travel to aid a student in the pursuit of studies or research. Past, present or future services cannot be expected or required in return for the travel award. Where services are expected, payments must be made through the Payroll Office. Travel expense reimbursements from University funds to students may be taxed and reported on either a Form 1099 or Form W2 for tax purposes.