

## TRAVEL POLICY

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### A. Purpose

This travel policy includes rules and regulations specific to The University of Texas Rio Grande Valley (UTRGV) travel. It also establishes rules for travel expenses paid with any institutional funds.

### B. Persons Affected

This policy applies to faculty, staff, and other travelers on behalf of UTRGV who travel for the purpose of official UTRGV business. This policy does not apply to student travel. Student travel is managed under [STU 01-300 Student Travel](#).

### C. Definitions

1. Account Manager – an employee who acts as an approver and is responsible for verifying the legitimacy, appropriateness, and necessity of transactions recorded against an account.
2. Allowable Expenses – actual expenses incurred not to exceed allowable daily expenses as defined in Section D9 of this Travel Policy.
3. Continental U.S. – the District of Columbia and all states of the United States other than Alaska and Hawaii.
4. Duty Point – for purposes of this policy, the destination (other than place of employment) to which an employee travels to conduct official State business.
5. Domestic U.S. Travel – Travel within the Continental U.S., Hawaii, Alaska, or U.S. Possessions.
6. Executive Officer – for purposes of this policy, an individual who is at the level of Dean, Department Head or Department Chair or Vice President as applicable.
7. Foreign Travel – travel to any country outside of the United States, Mexico, Canada, and U.S. Possessions; except that travel to Mexico and Canada will be considered foreign travel if there is a travel warning in effect, with such travel being required to follow the Foreign Travel authorization process.
8. Foreign Travel Authorization Form – form available for use by UTRGV employees to request approval for traveling to foreign countries on official UTRGV business.
9. Headquarters – for purposes of this policy, the city and state where the traveler's employment is located.

10. Institutional Funds – funds paid from any account not funded from state funds, sometimes referred to as “local funds.”
11. International Oversight Committee (IOC) – committee comprised of UTRGV faculty and staff which considers and evaluates travel to countries or regions in which warnings or alerts have been issued by the State Department where significant health or safety concerns are present.
12. Personal Leave – applicable paid leave entitlements and any compensatory time accrued. Paid leave entitlements include vacation, holiday, sick leave, and, under certain circumstances, may also include other specialty leaves.
13. Place of Employment – the office or other location(s) at which an employee most frequently conducts official State business.
14. State Funds – these funds are appropriated by the General Appropriations Act or the Texas Constitution.
15. Travel Authorization Form – form available for use by UTRGV employees to request approval for domestic travel.

**D. Policy**

1. This travel policy, along with the UTRGV Expense Resource Guide, are intended to provide for the reasonable needs of travelers, control travel expenses, maximize UTRGV’s ability to negotiate discounted rates with preferred suppliers, and facilitate proper reporting and compliance with applicable State and federal regulations.
2. Compliance with Internal, State, and Federal Rules and Regulations - This travel policy is intended to comply with the travel reimbursement rules and regulations applicable to travel by UTRGV employees (as well as UTRGV guests and consultants as applicable), and which may be located in a variety of sources, including the State of Texas Travel Regulations Act [Chapter 660 of the Texas Government Code](#), the General Appropriations Act, The University of Texas System [Board of Regents’ Rules and Regulations](#), the State of Texas Travel Guide ([Textravel](#)), official interpretations of the Travel Regulations Act by the State Comptroller of Public Accounts, and the Internal Revenue Code. If there is a conflict between this policy and a particular rule or regulation, the rule or regulation will control.
3. Adoption of Lower Rates - UTRGV has adopted rates for allowable travel expenses as indicated in the UTRGV Expense Resource Guide. Departments do not have the discretion to adopt rates lower than those found in the UTRGV Resource Guide.
4. Additional Restrictions - Some sources of institutional funds (such as gifts or grants) may impose additional restrictions on allowable expenses or reimbursements. It is the responsibility of the traveler and the person approving the travel to learn about and comply with those restrictions.

5. Exceptions - Exceptions to this travel policy may be approved when necessary to meet special circumstances or when in the best interest of UTRGV. Requests for exceptions must be documented, explained by the traveler, and approved in advance by the appropriate approvers (depending on the exception). Exceptions may also be subject to further review and approval by the Chief Procurement Officer, or designee.
6. Travel Authorization and Responsibilities
  - a. Travel Authorization and Notice - Prior approval is required for all travel as detailed below. Additionally, prior notice is required for business travel to Washington, D.C.
    - i. Domestic U.S. Travel - Prior to any domestic U.S. travel, the traveler must obtain approval for the travel from the traveler's immediate supervisor and from the appropriate Account Manager.
    - ii. Travel to Washington, D.C. - Prior to travel, when a trip involves obtaining or spending federal funds or impacting federal policies (i.e. when meeting with congressional offices) UTRGV personnel must inform the Texas Office of State-Federal Relations (OSFR) regarding the timing of the trip, the purpose of the trip, and the name of a contact person for additional information. The form can be found on and submitted via the [OSFR](#) (Texas Office of State-Federal Relations) website.
    - iii. Foreign Travel - All foreign travel must have prior approval for the travel from traveler's immediate supervisor and from the appropriate Project Manager. For purposes of the approval process, travel to any U.S. Territory is not considered foreign travel. When traveling into a foreign country a Foreign Travel Authorization Form is required. If the Foreign Country is on Travel Warning as per the U.S. Department of State, additional approval by the International Oversight Committee (IOC) will be required. If a Foreign Travel request is not approved by the IOC, an appeal can be made to the President's Office through the exception process defined in the Expense Resource Guide.
  - b. Compliance - Travelers, travel arrangers, and authorized approvers are required to comply with this travel policy. Intentional disregard for UTRGV's travel regulations and procedures may be considered grounds for disciplinary action or, in cases of fraudulent and or misrepresentation of travel expenses, may be referred for criminal investigation or prosecution. Failure to comply may result in additional reviews, delays, or non payment of reimbursements.
7. Travel Expenses - General Provisions
  - a. Conservation of Funds

- i. An employee's travel must be planned and conducted to achieve maximum economy and efficiency considering all relevant circumstances while complying with the guidelines set forth in this travel policy. Travel expenses must be reasonable, appropriately documented, and properly authorized.
      - ii. Travelers and departments should consider the use of UT System's on-line booking reservation tools.
    - b. UTRGV Business - The documented purpose of the travel must be for UTRGV business and be consistent with the legal authority of UTRGV. Requests documentation must include the purpose of the trip, benefit to UTRGV, and the dates of travel.
    - c. Approved Travelers
      - i. Employees - Employees, and guests and consultants as applicable, traveling for approved UTRGV business are eligible for the provisions of this travel policy.
      - ii. Attendant Care for Employees with Disabilities - Employees with documented disabilities may be reimbursed for attendant care travel expenses. The attendant's travel expenses are subject to the same rules as the employee's. First class airfare for disabled employees is allowable only if it is medically necessary and verified in advance by letter from the attending physician.
      - iii. Spouse of the President - Travel expenses for the spouse of the President are governed by University of Texas System Systemwide Policy [UTS120, Spousal Travel Policy](#).
      - iv. Prospective Employees - When a prospective employee is requested to travel for an employment interview, the individual may be reimbursed for travel expenses by submitting a Business Expense Reimbursement Form. A travel advance may not be issued to a prospective employee.
      - v. Guests and consultants as applicable - May be subject to same process as a UTRGV employee.
    - d. Receipts
      - i. Receipts are required for most travel expenses. Receipts should be in the name of the traveler and be for the dates claimed on the reimbursement request. Always attach an explanation if there are differences. Receipts are not required for meals related to domestic travel.
      - ii. If a receipt is not available, a signed written explanation is required.

e. Travel Time Periods

- i. Standard Time Frame - Employees traveling for approved UTRGV business are eligible for reimbursement of expenses incurred during the time frame in which business is conducted.
  - ii. Weekend Travel - If UTRGV business temporarily ends on Friday and resumes on Monday, the employee has the option to stay at the duty point or return to headquarters for the weekend, subject to certain limitations. If the employee chooses to remain at the duty point, expenses for the weekend are limited to the lesser of the amount of actual expenses, subject to the same limitations as weekday travel, or the amount of the expenses that would have been reimbursed had the employee returned to headquarters for the weekend and gone back to the duty point on Monday.
  - iii. Travel Required During Personal Leave Time - If an employee on personal leave at a location outside the designated headquarters is required to travel to a duty point, the travel expenses incurred may be reimbursed. When an employee is required to return to headquarters while on personal leave, the travel expenses incurred while traveling to headquarters and returning to the place the employee was staying while on personal leave will be reviewed and reimbursed as applicable.
- f. Erroneous Reimbursements - The possibility exists for an unallowable travel expense to be erroneously reimbursed. The payment of a reimbursement request containing an unallowable travel expense does not make future payments of like expenses proper. The employee must promptly reimburse UTRGV for any erroneously paid reimbursement request.
- g. Foreign Travel Expenses - Foreign travel expenses must be converted to U.S. dollars using the following currency converter: [www.xe.com/currencyconverter/](http://www.xe.com/currencyconverter/). The reimbursement request must specify the exchange rate used on the payment date (the exchange rate will be the rate applicable to the travel date, or, if applicable, the exchange rate used by the credit card company when it pays the charge). Receipts are required for all expenses including meals, lodging, and incidentals. Failure to provide actual receipts may result in delays or non payment of travel reimbursements. [www.xe.com/currencyconverter/](http://www.xe.com/currencyconverter/). The reimbursement request must specify the exchange rate used on the payment date (the exchange rate will be the rate applicable to the travel date, or, if applicable, the exchange rate used by the credit card company when it pays the charge). Receipts are required for all expenses including meals, lodging, and incidentals. Failure to provide actual receipts may result in delays or non payment of travel reimbursements.
- h. Rewards Programs - Subject to changes in Texas law, rewards such as frequent flyer miles or hotel rewards may be retained by the employee. Rewards programs may not influence travel decisions.

## 8. Transportation

### a. Travel by Automobile

#### i. Personal Vehicle

##### 1. Mileage Reimbursement

- a. UTRGV has chosen [Google Maps](#) as its tool for benchmarking mileage reimbursement. For locations not listed in Google Maps, odometer readings are required for any mileage claimed along with street address/intersection information. Complete information must be documented and kept as supporting documentation at the department level.
- b. An employee may be reimbursed for mileage to and from the airport from either the traveler's residence or the traveler's place of employment, regardless of the time of day travel occurs. Additionally, an employee may be reimbursed for the mileage incurred by another person transporting the employee to the airport. The reimbursement may not exceed the reimbursement that would have been paid if the employee had parked at the airport or nearby facility.

##### 2. Mileage Reimbursement Limitations

- a. The State Comptroller has determined that mileage reimbursement shall be based on the shortest, most cost effective and reasonably safe route. Longer routes, if chosen, must be justified and an explanation must be documented within the department as part of the travel reimbursement request.
  - b. Reimbursement of mileage at the set mileage rate is inclusive of all expenses, including fuel and repairs, associated with the operation of a personally owned or personally leased vehicle.
  - c. Tolls and parking expenses are reimbursable.
  - d. Reimbursement is not provided for travel expenses between a personal residence and the place of employment, or to travel to and from lunch.
- ii. Rented Vehicles - An employee renting a vehicle to conduct UTRGV business, either in-state or out-of-state, is authorized reimbursement for the actual rental cost of the vehicle.

1. Mandatory Use of University of Texas System Car Rental Contracts - Travelers who choose to rent a car, are required to use the University of Texas System contracted car rental companies unless the contract vendors are unable to provide the car type needed for the location and dates required for travel. If contract vendors are unable to provide the necessary services applicable documentation of such must be kept at the department level.
  2. Business and Personal Use - When an employee uses a rental vehicle for both personal reasons and UTRGV business, only the portion attributable to UTRGV business may be reimbursed. Rental expenses may not be reimbursed if the rental was necessary only because the employee combined personal and UTRGV business.
  3. Additional Charges - For University of Texas System contracted rental car agencies, the insurance coverage is included in the contracted rental rate. In addition, charges for frequent flyer credit, GPS, satellite radio, and other non-business essential services will not be reimbursed. Charges for liability insurance supplements, personal accident insurance, safe trip insurance, and personal effects insurance are not reimbursable. A collision damage waiver or a loss damage waiver is reimbursable only when a traveler is required to use a rental car agency that is not a University of Texas System contract vendor.
  4. Reimbursable Expenses - When associated with rental vehicles, reimbursable expenses include Texas and other state sales taxes, gasoline, parking fees, and toll charges.
- iii. Coordination of Transportation - "Coordination" of transportation means UTRGV employees traveling together in one personally owned or rented vehicle. Coordination must occur when two or more employees, employed by the same department, travel from the same headquarters to the same duty point at the same time. When coordination is required, only one of the employees may be reimbursed for mileage. However, mileage incurred to travel to a pick-up point by other employees may be reimbursed. Coordination is not required if it is determined infeasible for business reasons. When coordination is determined to be infeasible, a written statement identifying the reasons for that decision must be documented at the departmental level.
- b. Travel by Airplane
- i. Commercial Airlines - The cost of commercial air transportation may not exceed the cost of University of Texas System or State-contracted airfare, if available, or if not available, then the lowest available fully refundable coach airfare.

- ii. Contracted Airfare - Information pertaining to University of Texas System contract airfares can be found on the UT System Travel website.

The State Comptroller of Public Accounts contract airfare information can be found on the UT System Travel website.

1. Mandatory Use of Contracted Airfare - Travelers are required to use University of Texas System or State-contracted airfares unless one of the following exceptions exists. When one of these exceptions is used, the travel agency will document this in the reservation.
  - a. Lower Total Cost to UTRGV - Use of a noncontract airfare is permissible when the noncontract airfare is less than the contract fare, or if, when all travel expenses are evaluated (including ground transportation, parking fees, taxes, and travel time) it results in a lower total overall cost to UTRGV. If the contract airfare is the same or lower rate, the contract airfare must be used.
  - b. Unavailability of Contract Travel Services - Use of a noncontract airfare is necessary because the contract airline is sold out, is not able to provide services at the time or location necessary to accomplish the purpose of the trip, or is unable to provide services due to a force majeure event.
  - c. Special Needs - The traveler's health, safety, physical condition, or disability requires accommodations, including medical emergency or other necessary services, not available from a contract airline.
  - d. In Travel Status - The traveler is in the course of travel and changes in scheduling render the use of a contract airline impractical or a contract airline is not available. The traveler shall make reasonable efforts to secure rates equal to or lower than the contract rates.
  - e. Group Program - The traveler is using a group program wherein reservations must be made through a required source to obtain a specific rate or service.
  - f. Emergency Response - The traveler is responding to a public health or safety emergency situation.
  - g. Legally Required Attendance - The traveler is required by court, administrative tribunal, or other entity to appear at a particular time and place without sufficient notice to obtain contract airfare.

- ii. Travel Agencies/Online Booking Tools - UTRGV employees are required to use a University of Texas System contract travel agency for air travel arrangements unless one of the following exceptions applies:
  - a. Travel costs borne by an entity external to UTRGV.
  - b. Emergency situations (flood, hurricane, etc.).
  - c. UTRGV is unable to provide an airline fare within \$100 of a lower fare available from an alternate travel provided. Advance approval with a documented comparison is required.
  - d. Group or conference airfare/discount not available through University of Texas System contract agency.
- iii. Nonbusiness Travel - Contract airfares may not be used for leisure, personal, or nonbusiness travel.
- iv. Nonemployees - Guests, consultants, and contractors may utilize University of Texas System contract airfares when traveling on behalf of UTRGV and when travel is paid by UTRGV.

State-contracted airfares are not available to independent contractors or consultants working for UTRGV, even if UTRGV reimburses their travel. State-contracted airfares are, however, available to prospective employees and speakers invited by UTRGV and whose transportation, lodging, meals, and incidental expenses are paid by UTRGV.
- v. Group Travel - University of Texas System and State-contracted airfares are not for group travel. When securing tickets for 10 or more persons, contact a University of Texas System travel agency and inquire about group rates.
- vi. First Class Airfare and Upgrades - With advance approval by the appropriate Executive Officer, first class airfare may be reimbursed, without limitation as to the source of funds, if it is the only available airfare or if it is required due to medical or physical limitations as documented by an attending physician.
- vii. Frequent Flyer Miles/Flight Credits - UTRGV will not reimburse for tickets purchased with frequent flyer miles or personal flight/travel credits. Frequent flyer and bonus travel programs should not influence the traveler's flight selection or routing.

- viii. Chartered Aircraft - The use of charter aircraft requires advance coordination with University of Texas System Travel Services and contract review by the Office of General Counsel and appropriate Executive Officer. In addition, the Texas Department of Transportation must provide advance approval for any charter flight paid with state funds. With applicable approval, an employee may charter an aircraft if the University of Texas System or State-owned aircraft is not available or if the charter would reduce the cost of transportation.
- c. Travel by Mass Transit, Taxi, or Limousine - Receipts are required if public transportation is used to travel between cities, other than within a metro area. The cost of limousine transportation may be reimbursed only if it is the lowest cost transportation available; documentation is required.

## 9. Meals and Lodging

- a. Same-Day Travel - When the entire trip begins and ends in the same calendar day, reimbursement for meals will be subject to daily UTRGV limits in the UTRGV Expense Resource Guide during the travel period.
- b. Receipts and Rates - Lodging receipts should show the number of days, room charge per day, and itemized taxes charged per day. All rates should be at the single room rate.
- c. Texas State Occupancy Tax - Employees of UTRGV are exempt from the Texas State Occupancy Tax when traveling on UTRGV business. A traveler must present the lodging establishment with a completed exemption certificate upon check-in. If a lodging establishment refuses to honor the certificate, the traveler will be reimbursed for the tax. The traveler must document the refusal. UTRGV employees are not exempt from county or municipal occupancy taxes or another state's taxes; therefore, a traveler may be reimbursed for those taxes. If actual lodging expenses exceed allowable expenses, occupancy tax reimbursement is limited to the pro rata tax attributable to the allowed lodging expenses.
- d. Lodging and Hotel Accommodations - For in-state or out-of-state travel, travelers may stay at the hotel of their choice. Choice of hotel must comply with the limits set by General Services Administration (GSA) Guidelines and requirements outlined in this Policy and the UTRGV Expense Resource Guide.
- e. Shared Lodging - If two or more employees elect to share lodging, the reimbursement should be divided equally between the employees paying the expense. Failure to comply may result in delays or non payment of reimbursement. Each employee's share may not exceed the single occupancy rate. Sufficient detail must be provided with the reimbursement request to permit the determination of the number of employees sharing the room and the resultant cost savings.

- f. Packaged Travel Arrangements - If meal or lodging expenses are mandatory and included with the registration fee, then they are fully reimbursable. If meal and lodging expenses are not mandatory, then the reimbursement may not exceed the limits for meals and lodging.
- g. Lease of an Apartment or House - If a department anticipates that an employee will be at a duty point for at least one month, but less than one year, the expense of leasing an apartment or house may be reimbursed. Advance approval must be obtained from the Account Manager. The name of the employee must appear on the lease and the purpose for leasing must be the conservation of UTRGV funds. Any deposit required for the lease of a house or apartment is the sole responsibility of the employee and is not reimbursable.
- h. Nonreimbursable Expenses - An employee may not be reimbursed for meals or lodging expenses incurred within the service area of the employee's designated headquarters. However, an employee may be reimbursed if the expenses are mandatory and connected with training, a seminar, or a conference, and a statement is added to the reimbursement request stating such. Meal and lodging expenses may not be reimbursed for any days the employee is absent from duty for personal reasons. Personal reasons include, but are not limited to, illness, a family emergency, breakdown of a motor vehicle, or any occurrence not connected with official duties.
- i. Limits for Meals and Lodging - Employees must comply with the requirements of the [UTRGV Expense Resource Guide](#).

## 10. Other Expenses

- a. Parking
  - i. Airport Parking - Airport parking fees are reimbursable and should be listed separately on the reimbursement request.
  - ii. Valet Parking - Itemized charges for valet parking are reimbursable if the traveler is staying at the lodging establishment or attending a conference at the establishment, and valet parking is the only parking option at the establishment; otherwise, the expense is considered personal and is nonreimbursable.
  - iii. Other - Other parking fees incurred away from the place of employment while transacting UTRGV business are reimbursable and should be listed separately on the reimbursement request.
- b. Cancellation or Ticket Change Fees - A cancellation or change fee is reimbursable only if the charge is incurred for a business related reason, personal emergency, illness, adverse weather conditions, or a natural disaster and approved by the appropriate Executive Officer.

- c. Free or Discounted Travel - An employee will not be reimbursed for travel if no expense has been incurred. Receiving free transportation or lodging in exchange for mileage or points does not constitute an expense. If money is paid directly to obtain a discount, then reimbursement is limited to the lesser of the cost of obtaining the discount, the amount of the discount, or the maximum reimbursement allowed for that type of travel expense.

**E. Procedures**

Travel related forms are available via UTRGV's electronic procurement system.

**F. Related Statutes or Regulations, Rules, Policies, or Standards**

*Texas Government Code Chapter 660, [Texas Travel Regulations Act](#)*

[Texas General Appropriations Act](#)

[Texas Travel Guide \(TexTravel\)](#)

[Internal Revenue Code](#)

[University of Texas System Board of Regents' Rules and Regulations Rule 20801, Travel](#)

[UTS120, Spousal Travel Policy](#)

[STU 01-300 Student Travel](#)

[UTRGV Expense Resource Guide](#)

**G. Dates Reviewed or Amended**

December 1, 2017 - Reviewed and Amended

February 6, 2020 - Reviewed and Amended with Non-Significant Changes