



<b>Policy Title:</b>	<b>Travel – Authorization, Expenditures and Reimbursement</b>
<b>Policy Number:</b>	FAST-201
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<b>Policies Superseded:</b>	603; FINA-103
<b>Policy Management Area(s):</b>	Finance and Administration

**SUMMARY:**

The regulations in this statement govern travel at University expense. The travel must be necessary for the proper execution of official University business or be in justifiable pursuit of the University’s educational and research objectives. Meetings and conferences to be attended must be of a professional nature directly associated with the individual’s duties and role within the University.

Adequate documentation must exist to allow for verification of expenditures. Employees should exercise discretion in incurring any and all expenses. Neither personal expenses nor excessive costs and unnecessary or unjustified expenses will be reimbursed. University employees should be as conservative as good taste and circumstances permit in the expenditure of funds for official travel.

**I. POLICY**

**A. Definitions**

1. Electronic Approval – approval of a voucher/reimbursement request or of other documentation may be done electronically with a fax/scanned copy of a signed document or via secured email from an approver directly from his/her email address.
2. Reasonable expense – an expense that is ordinary and reflects a prudent decision to incur the expense on behalf of University business and is not extreme or excessive.
3. University Travel – as described in this policy, is any transportation to a destination more than 10 miles from the University for the purpose of conducting business of the University, attending professional meetings, conferences, workshops, conventions and other related meetings, or supporting field trips or activities for students for any purpose of the university. Travel less than 10 miles from campus, such as research and course field trips, which requires the support of institutional resources and therefore a Travel Authorization is also identified as University Travel for the purpose of this policy.

**B. Prudence and frugality in conserving scarce resources**

A traveler on official business will exercise the same care in incurring expense and

accomplishing an assignment that a prudent person would exercise if traveling on personal business. Excess costs, circuitous route, delays or luxury accommodations unnecessary or unjustified in the performance of an assignment are not considered acceptable as exercising prudence. Travel by commercial airlines will be accomplished in coach class, except where exigencies require otherwise. Transportation to and from points of arrival and departure will be accomplished by the most economical means.

C. Authorization for official travel

Further details about approvals for specific types of programs will be available on the University Travel webpage at <https://www.coastal.edu/financialservices/ap/inside/travel/>.

All expenditures and reimbursement for University Travel shall only be conducted after a properly approved Travel Authorization has been completed for the respective type and purpose of travel.

1. Individual Travel University travelers will only do so with approval of appropriate officials on a Coastal Carolina University Travel Authorization (TA) Form that is available on the Forms webpage or Accounts Payable webpage. The appropriate official is defined as the Budget Officer; however, if the Budget Officer is the traveler, their supervisor must approve the Travel Authorization Form.
2. Group travel  
Group travel is allowed for Coastal Carolina University student groups and participants in University-sponsored programs who are not employees, as long as any non-CCU employee(s) have received proper approval to travel, based on the type of travel. One Travel Authorization form may be submitted in the name of one individual with an attached list of all others traveling with the group. There are circumstances when expenditures for group travel are incurred by someone other than the traveler(s). Under these specific circumstances, the signature of the individual incurring the expenses is sufficient for reimbursement. On the Expense Settlement Form, the signature of the traveler is not required; however, approval is required by the Budget Officer.
3. Blanket travel approval for Repetitive University Travel  
An individual or unit required to travel on repetitive business trips may submit a Blanket Travel Authorization covering a specified time frame (not to exceed one fiscal year) and a maximum reimbursement amount for that time period. All anticipated locations and expenditures must be included on the Blanket Travel Authorization.
4. Specific instances of local travel supportive of university business (e.g., course field trips, research travel, school visits in support of student practical experiences, recruitment to local schools, student activities events) less than 10 miles away from the university should have a Travel Authorization completed with approvals for expenditures following processes noted in this document. University officials traveling under 10 miles away from campus on a regular basis may file a Local Mileage Reimbursement Log as approved by the respective Budget Officer.
5. Basic information required  
Requests for authorization to travel must include the purpose of the trip, dates of departure and return and mode of transportation and must include expense projections with supportive materials to justify the requested budget amounts for the travel.

Required related to funding and expenditures for University Travel are provided in this policy.

6. Certain travel may have additional approvals required. Travel funded by sponsored program/grant accounts requires approval by the budget officer and the Director of the Office of Sponsored Programs and Research Services as an additional approval beyond the budget officer's supervisor. International travel requires approval through the Center for Global Engagement.
- D. Grant and contract travel  
Travel expenses to be paid from grant or contract funds will be in accordance with provisions of the grant or contract if there are provisions within the grant that specify travel regulations. If there are no specific provisions in the grant or contract pertaining to travel, expenses will be reimbursed in accordance with University regulations.
- E. Expense reimbursement limitations and receipt requirements  
University employees traveling on University business are reimbursed for actual necessary expenses incurred, subject to limitations set forth by state laws and regulations, and by this policy. An itemized receipt for each expenditure must be submitted with the Expense Settlement Form. Exceptions to providing itemized receipts are provided on the University Travel webpage: <https://www.coastal.edu/financialservices/ap/inside/travel/>.
- F. Group travel expenditures  
Expenditures for group travel may occasionally be incurred by someone other than the traveler(s). Under these specific circumstances, the signature of the individual incurring the expenses is sufficient for reimbursement. On the Expense Settlement Form, the signature of the traveler is not required; however, approval is required by the Budget Officer.
- G. Methods of paying travel expenses
1. Prepayment of expenses  
Prepayment by invoice to approved vendors is preferred in advance of travel whenever possible. The payment will follow processes established by Accounts Payable.
  2. Travel card program  
**The preferred method of paying travel expenses is using the Corporate Travel Card.** The Corporate Travel Card program is maintained by the Accounts Payable Office to provide employees the option to carry a University Travel Card, which is funded prior to the employee's travel departure date, instead of receiving a cash advance or using their personal credit cards when traveling on University business. Details about the Travel Card and process to acquire one are provided on the University Travel webpage at <https://www.coastal.edu/financialservices/ap/inside/travel/>. Departments should contact Financial Services to make arrangements to cover travel costs for students traveling on official University business not accompanied by faculty and staff.

3. Out of pocket

A traveler may also pay his/her travel expenses out of pocket and request reimbursement for approved expenses by filing the Expense Settlement Form located on Forms page and providing all supportive documentation. Travelers need to be aware that reimbursement may take some time to process if this route is chosen.

4. Cash advances for travel

a. The use of cash advances is generally not approved. Under extenuating circumstances, cash advances, not to exceed 80 percent of the total estimated reimbursable expenses on the Travel Authorization Form (less any prepayments such as registration fees or airline tickets), may be made to employees traveling on official University business. No advance shall be made in instances where 80 percent of the estimated travel expense does not exceed \$250. Cash advances must be requested either as a check made payable to the traveler or a direct deposit into the traveler's bank account. Student travel cash advances may be made for 100 percent of the reimbursable expenses to a University official. No cash advances will be made for travel within the state of South Carolina.

b. Cash advance reconciliations will be reviewed by the Accounts Payable staff prior to being processed by Financial Services. When receiving a cash advance, an employee must sign a form authorizing the University Payroll Office to deduct the amount of the advance from his/her payroll check if the Expense Settlement Form is not submitted within seven (7) business days from the date of his or her return. When submitting the Expense Settlement for the respective travel, first the cash advance must be cleared (denoting approved actual expenditures at or exceeding the cash advance amount) or when submitting an Expense Settlement for which actual approved expenditures were less than the cash advance, providing a check back to CCU for the remaining amount of the cash advance when the Expense Settlement is submitted. A cash advance must be cleared before another one can be made to the same individual, except in cases when one travel trip ends at or near the beginning of the next trip.

H. Travel reimbursement claims

1. Use of proper forms

Upon the traveler's return, claims for reimbursement of travel expenses should be completed, approved and submitted on the Expense Settlement Form as soon as possible but not to exceed 30 days after the trip ended to receive reimbursement for qualified expenses. A separate Expense Settlement Form must be filed for each authorized traveler, except in the case of Student Group Travel. Information on all forms must be legible and completed in its entirety. Before reimbursements will be made, all Travel Authorizations submitted for employees require the signature of the Budget Officer from the account(s) from which the reimbursements are being sought and for which the TA has been authorized.

2. Approval signatures

The signatures on the Travel Authorization Form and on the Expense Settlement Form must be the original signatures of the appropriate individuals or their

designees. Expense Settlement Forms require the Budget Officer's signature and the employee's supervisor if the employee is the Department Budget Officer. If an increase has to be made to cover actual expenses, the appropriate Budget Officer must approve the increase in advance of reimbursements being processed.

I. Travel modes and related expenses – Automobile

1. Automobile transportation and related expenses

Automobile transportation should be used when the cost is most expedient for destination of travel or to reduce expenses when two or more University employees and/or students are traveling together. Reasonable tolls will be allowed where necessary. No reimbursement will be made to operators of state-owned or personally owned vehicles used in the course of official travel or business for fines for parking, moving or nonmoving violations.

2. University motor pool

Whenever transporting groups in the area or region, travelers should follow appropriate transportation processes to reserve university motor pool vehicles and/or to rent outside larger busses as provided at: Motor Pool Rentals - Coastal Carolina University.

3. Commercial state contract vehicle rental

If necessity or economy requires travel by automobile, a University-contracted rental automobile (under the University rental agreement with a commercial provider as provided on the University Transportation page at Enterprise Rentals - Coastal Carolina University) should be used as this contract provides for primary insurance coverage for the drivers.

If the traveler is informed by University Transportation and/or the University rental agreement company noted above that no suitable vehicle is available, the traveler may make arrangements through an external rental car company without further approvals as long as the amount budgeted does not exceed approved expenditure amount for this purpose. The traveler's own insurance will be the primary insurance of any such rental. If a University-owned or rental vehicle is used for travel, the authorized employee will be issued a commercial gasoline credit card. All gasoline receipts for the University-owned automobiles will be obtained at purchase and submitted to the Office of Transportation Services upon return of the vehicle.

4. Private automobile usage

A University employee may use his/her personal automobile for official travel provided the University will not incur additional expense above that of other forms of transportation available. Reimbursement for personal automobiles will be \$.04 per mile less than the current standard business mileage rate per mile as established by the Internal Revenue Service ([IRS Current Mileage Rate](#)). When mileage is used as the basis for reimbursement of personally owned automobiles, the employee must bear the expense of gasoline, other supplies and the total upkeep of the personally owned vehicle. Details about this process are provided on the University Travel webpage at <https://www.coastal.edu/financialservices/ap/inside/travel/>. Should an employee be involved in an accident while traveling in their personal vehicle, the employee's personal insurance is the primary payee for any related claim.

5. Car rentals at destination

Charges for automobile rental at the traveler's destination will be allowed when it is more economical than alternative methods of transportation or if it is the only practical means of transportation. An itemized receipt must be obtained and submitted with the request for reimbursement. The State of South Carolina contract for vehicle rentals should be followed to make such reservations if at all possible.

6. Coverage limited for insurance from car rental agencies

The State of South Carolina rental car contract has no deductible for collision damage waiver insurance and so collision damage waiver is reimbursable if the rental originates outside South Carolina. Travelers are encouraged to take this coverage.

Personal accident insurance afforded by car rental agencies, which provides personal benefits for the renter, is a personal expense of the renter and is not reimbursable by the University. If the employee desires this coverage, the charge and applicable tax must be deducted from the car rental receipt prior to submitting the request for reimbursement.

J. Travel by common carrier

Travel by airplane is recommended when the arrival to the destination is infeasible otherwise, the cost of the employee's time is an important factor or where the travel time by other methods would increase the subsistence expense. Accommodations must be limited to tourist or economy class. Transportation for individuals traveling alone should be by common carrier whenever practical. Travelers must seek the most economical that is practical. Individuals traveling by an indirect route must bear any additional expenses.

1. Purchase of common carrier tickets

Employees must purchase tickets prior to travel and obtain reimbursement through an Expense Settlement Form after travel is completed regardless of the payment method used.

2. Payment by the University

Tickets may be purchased with the University Travel Card. Air transportation tickets may be purchased in advance directly by the department of the traveler or by the individual(s) authorized to travel.

3. Initial payment by the individual

Those purchasing the tickets themselves must obtain reimbursement through an Expense Settlement Form AFTER travel is completed. The traveler's copy of the transportation ticket showing itinerary and cost must accompany the Expense Settlement Form. Employees who purchase tickets on the Internet must provide an Internet printout of the itinerary and proof of credit card purchase.

K. Lodging expenses

Lodging expenses will be allowed subject to the following limitations:

1. In-state or out-of-state

Actual lodging expenses will be reimbursed for employees traveling on official business; however, the more moderately priced accommodations must be requested when a choice is available. Employees should request a state or government rate.

2. Typically, no reimbursement will be made for overnight lodging within fifty (50) miles of the employee's official headquarters and/or residence. If approved in advance and

if the employee is required to participate in evening programs, the University may pay for such lodging.

3. En route lodging may not exceed one night each way.
4. Shared Room with Single Bill

The expense for shared lodging may be reimbursed to one employee if only one itemized lodging receipt is obtained and if the name of the other employee is provided on the request for reimbursement. If a room is shared with someone other than a University employee, actual cost for the single room rate will be allowed. The receipt for the entire amount must be submitted with the request for reimbursement.

#### L. Meal Expenses

Meal reimbursements are not allowed for trips that do not have an overnight stay. For travel that involves an overnight stay, the limits, based on type of travel, and departure/return times are provided on the University Travel page at <https://www.coastal.edu/financialservices/ap/inside/travel/>.

The hour and date of departure and the hour and date of return must be shown on the Expense Settlement Form. Reimbursement for meals is not allowed if meals are provided as part of the conference fee.

Per diem rates are not normally used for group meals with non-University employees. For per diem rates and guidance on the processes to seek approval and limitations, please see the University Travel webpage at: <https://www.coastal.edu/financialservices/ap/inside/travel/>.

#### M. Miscellaneous Expenses

##### 1. Telecommunication Expenses

Charges for long distance telephone calls, telegrams, internet connection fees or facsimile charges made to conduct official business will be allowed. Personal long-distance communication charges will be allowed if such charges are kept to a reasonable amount.

##### 2. Incidental Expenses

Laundry, airline preferred seating, valet service, health or spa fees, safes, movies, etc., are considered personal expenses and will not be reimbursed. The only exception is for employees such as Admissions Counselors, who are required to travel for several weeks without returning to their homes. In such cases, the employee may be reimbursed for reasonable laundry expenses.

3. Generally, gratuities are not an allowable reimbursement. When paid as a part of a billing for a banquet, luncheon, etc., gratuities will be allowed. Portage, in general, is not an allowable reimbursement. It may be reimbursed when an employee flies to a major city out-of-state where there usually is no option concerning baggage handling. Portage may also be reimbursed when an employee has heavy, excess equipment needed to conduct official state business.

## N. International Travel

1. All Travel Authorizations involving international travel must include coverage for emergency medical, security, evacuation and repatriation of remains through the insurance carrier provided through the Center for Global Engagement (CGE) and follow all procedures as noted in UNIV 301 International Travel. This provision applies to all students, faculty and staff participating in international internships, research, conference travel, and short-term study abroad experiences, as well as other university travel at university expense.
2. The CGE makes purchases including airline tickets, prepaying hotels, hostel or universities and making advance payment for ground transportation, admission fees, theater tickets and excursions. Whenever possible, these expenditures are handled through invoices.

## O. Meals

When traveling on university business outside the United States, university travelers are entitled to reimbursement at a maximum daily rate for meals as established by the approved program budget and clearly noted on a properly executed Travel Authorization not to exceed the federal per diem rates. These amounts can be claimed without receipts. Reimbursement will follow same guidelines as provided on the University Travel webpage: <https://www.coastal.edu/financialservices/ap/inside/travel/>.

## P. Expense Reimbursement for Visitors, Guests and Candidates

### 1. Travel Reimbursement Claims

All visitor, guest, and candidate travel expenses are borne by the host department in accordance with standard University policies and procedures. Either in person or via e-mail, the host department is responsible for obtaining a signed Expense Settlement Form complete with all information necessary for processing. Proper receipts for expenses must be attached to the voucher. If some receipts are not available prior to departure, the visitor, guest, or candidate should be instructed to submit the additional receipts as soon as possible. No reimbursement for expenses of family members or others accompanying the visitor, guest, or candidate is authorized. The University President or his designee must approve any exceptions to this policy.

### 2. Travel Expenses

Travel expenses may be paid to individuals or companies that are doing business with the University. Reimbursements for travel are allowed in accordance with regulations established for State employees unless otherwise stipulated in a contract with the University.