

INTRODUCTION

This manual is intended to familiarize new and existing employees with current business travel rules and procedures for University of South Florida (USF). This document should function as a reference guide as requests for permission to travel are submitted, travel arrangements are made, and travel reimbursements are requested.

Florida Statute (F.S.) 1001.706 (6)(c) specifies that university employees are public employees for the purposes of travel and are bound by the travel requirements laid forth in F.S. 112.061. Most USF travel requirements are based, either directly or indirectly, on the provisions of 112.061. Any exceptions to these requirements will be granted on a case-by-case basis.

Terms used throughout this document that are explained in the definition section are capitalized.

Unless otherwise specified as business days or work days, all references to days refer to calendar days.

Any documentation that is required along with the electronic submission of an Expense Report is listed in table form in this document as follows:

Required Back-up

<p>Any documentation that is required, such as expense receipts or other required back up, will be listed at the end of each section in a table like this.</p> <p>Additional paperwork, back up or signatures that <i>may</i> be required in <i>special or exceptional circumstances</i> will be described in this format also.</p>

To obtain system access, users who initiate travel transactions for others are required to complete **“Travel Rules and Requirements”** training, offered through USF Employee Learning. This training provides an in-depth review of the concepts in this manual and supporting functions. To access all available Travel resources, visit the [Travel Webpage](#).

Table of Contents

INTRODUCTION	2
I. DEFINITIONS	4
II. OVERVIEW OF PROCESS	7
Workflow Role.....	7
Traveler Profile	7
Travel Request	7
Booking Travel Arrangements and Reservations	9
Expense Report	9
USF Procurement Card (PCard)	10
Receipt Package	10
Timeliness	10
Duration of Travel.....	11
Cancelled Travel	11
III. RULES AND PROCEDURES AND GENERAL ACCOUNTING	12
Sponsored Projects.....	12
Travel Expenses Shared by Travelers.....	12
Travel Expenses Shared by Departments	13
Travel Expenses Not Reimbursed by USF	13
Payment of Less than Published Meal or Mileage Allowances.....	13
Reimbursement of a Flat Amount.....	14
Miscellaneous	14
Job Candidates	14
Travel Expenses paid in Addition to Consulting Fees.....	14
ADA Accommodation	15
Travel Packages	15
Travel Stipends	15
IV. RULES AND PROCEDURES-GENERAL EXPENSES	16
Registration.....	16
Transportation.....	16
Air	16
Mileage	18
Car Rental	19
State Vehicles.....	20
Other Ground Transportation.....	20
Personal Plane.....	21
Flat Per Diem	21
Incidentals	22
Services	23
Expenses Not Allowed.....	24
V. RULES AND PROCEDURES-DOMESTIC MEALS AND LODGING	25
Domestic Meals	25
Domestic Lodging.....	26
VI. RULES AND PROCEDURES-FOREIGN MEALS AND LODGING.....	27
Foreign Meals	27
Foreign Lodging.....	29
VII. CASH ADVANCE.....	30

fellowship, contract, grant or provide for a clear University business purpose; 5) Research study participants.

II. O

A Travel Request in advance of any travel to a conference or convention is explicitly required per Florida Statute.

For mileage-only trips (may also include mileage-related incidentals such as tolls and parking and/or fuel for use of a state vehicle) an electronic Travel Request is not required. Prior approval is still required but may be documented and filed at the department level. Please note: pursuant to Florida statute, travel to a conference or convention will require a Travel Request even if mileage is the only expense being claimed for the trip.

Should authorized Emergency Travel be required of an employee that prohibits prior entry of a Travel Request into Archivum, a Post-Travel Authorization (PTA) Travel Request is required indicating the details of the travel and the circumstances that prohibited adherence to the normal Travel Request process, including evidence that the situation was out of the trav
The PTA Travel Request requires additional approval by the appropriate Vice President, which must be obtained and uploaded into Archivum Travel.

The Post-Travel Authorization Travel Request will be required in any case where the required Travel Request was not completed prior to the travel; however, the following circumstances are not grounds for a standard exception, and college and VP areas are responsible to ensure necessary steps are taken internally to prevent recurrence.

1. Any travel with more than 24 hours notice.
2. Ignorance of the requirement for prior authorization.
3. Circumstances of the delay that fall under the control of the traveler or department administrative staff.
4. Exception requested solely because a traveler is already out of town when an additional destination is added to the itinerary. Employees are able to access Archivum from a

USF business travel must always be approved in advance. If business travel will occur for which USF will not be financially responsible in any way:

For Domestic travel, an electronic Travel Request in the system is not required. Prior approval is required, but may be documented and filed at the department level.

For International travel, an electronic Travel Request in the system is required for insurance purposes. The electronic Travel Request should be entered into the system and fully approved, but then must be can nt after the travel is completed, since no Expense Report will be submitted.

In accordance with USF Policy 10-507, all student international travel must be registered with Education Abroad Office or USF Health and must be authorized by USF World. Comprehensive guidelines can be found at: <https://www.usf.edu/world/for-global-travelers/> and USF Health at <https://health.usf.edu/international/travel-processes> . This applies to students, faculty, staff and volunteers associated with student travel.

Per Florida Statute section 1010.36, any employment-related foreign travel and employment-related foreign activities engaged in by all faculty, researchers, and research department staff must be screened and pre-approved by a Research Integrity Officer (RIO). All Travel Requests to foreign locations require RIO approval after fiscal

recommended that any expenses paid or provided by an outside organization by virtue of the
t ment be reported in the

Expense Reports for mileage-only and related incidentals may be submitted on a quarterly basis.

Duration of Travel

Travel from a USF employee headquarters to a single location for a period of over thirty continuous workdays requires the approval and signature of the President of the University. Before requesting a Travel Request in the system, the traveler should obtain approval using the [Preapproval for Travel over 30 days](#) form. The form should ultimately be included with the Receipt Package.

Required Back-up
President office approval for travel to a single location for more than thirty continuous workdays.

III. RULES AND PROCEDURES AND GENERAL ACCOUNTING

The provisions of these directives apply to all authorized University travelers, including employees (full and part time), students, employment candidates, consultants or independent contractors.

Requi

Travel sponsored by Student Government. Travel sponsored by Student Government funding will be reimbursed at the rates set forth in the Student Government Statutes related to sponsored travel.

Student group travel. Meals for student group travel may be purchased and reimbursed at actual cost, provided that the total cost is less than the combined meal allowance for all participants.

Reimbursement of a Flat Amount

If the department head wishes to set an overall dollar limit on the amount of funding a traveler will be provided for specific elective travel, the limit should be agreed to by the traveler and documented in writing at the time of the Travel Request *before* the trip. The signed document should be included with the Receipt Package submitted later with the Expense Report.

For this type of arrangement, the total amount of expenses reported on the Travel Request and the Expense Report should equal the agreed limit. Receipts must be provided to support at least the total amount claimed. Any expenses paid by direct Payment, PCard expenses or any other expense paid in advance by USF, regardless of expense type, must be recorded first on the Expense Report, followed by traveler paid expenses.

Required Back-up

Document, signed and dated at the time of Travel Request, showing agreement of traveler and Department Head when total reimbursement amount is being capped.
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Miscellaneous

Job Candidates

If a department or business unit is paying Travel Expenses for an individual visiting for job interview(s), the relevant position number should be provided when the Travel Request and/or Expense Report is entered into Archivum.

Travel Expenses paid in Addition to Consulting Fees

When the University pays Travel Expenses incurred by independent contractors or consultants, the expenses may be paid either as part of the contractor s flat service fee (all-inclusive) or the agreement may stipulate travel costs to be paid as separate reimbursable expenses. In the latter case, Travel Requests and Expense Reports will be submitted, and reimbursements paid, in the same manner as other University Travel. Non-employees incurring Travel Expenses under this circumstance are bound by all USF Travel rules and procedures. Any receipt(s) showing fee payment should be included with the Receipt Package.

If a company is being reimbursed, as opposed to an individual, the expenses are not entered into the Archivum Travel System. Instead, the invoice will be processed through Accounts Payable, however, travel expenses must still be itemized, all itemized receipts provided, and expenditures are subject to the requirements of Florida Statute 112.061.

Required Back-up
A copy of the purchase order showing payment of service fees. Itemized receipts must be submitted with each invoice for all invoices paid through Accounts Payable which include itemized travel expenses paid directly to a supplier.

ADA Accommodation

University employee travelers that require reasonable accommodation under the Americans with Disabilities Act (ADA) for travel arrangements should submit requests for a reasonable accommodation to Human Resources, Employee Relations, a minimum of ten (10) business days before the date of travel. The approved ADA reasonable Accommodation Request Number (ARN) must be included in all justification provided for any disability-related exception to the requirements of the university Travel Manual for university employees.

For any disability-related exception for non-employee travelers, include a signed statement from the department head certifying the traveler has requested a reasonable accommodation, the individual has been determined to be a qualified individual with a disability and the request is a reasonable accommodation pursuant to ADA for that individual. The respective university department is responsible to maintain all records related to an i

IV. RULES AND REGULATIONS

USF travelers will be reimbursed for all airline fares in economy and coach, or equivalent classes. See the [Airline Class Guide](#) on the USF Travel website for guidance on allowable and not allowable classes for the major domestic airlines. Business class travel is reimbursable for all segments of trips with at least one segment lasting longer than 8 hours.

If flying a different route for personal reasons, advance airfare quotes showing round trip to and from business event must be included with the Receipt Package for comparison purposes.

been used. An exception to this rule is normally taken when the car is shared with other travelers resulting in a savings to the University on airfare, or when the cost of renting a vehicle in the city where business is conducted exceeds the mileage allowance claimed. If the traveler chooses to drive long distance rather than fly for personal reasons, comparable airfare quotes should be obtained before the travel occurs and provided as part of the Receipt Package. The lesser of the two amounts will be reimbursed.

Required Back-up

A record of miles must be accurately maintained and shown on the Expense Report. If more convenient, a separate log may be included with the Receipt Package showing multiple trips of recurrent mileage, as

Any additional e

Personal Plane

The use of personal planes for USF business is not reimbursable due to increased liability and administrative cost issues.

Flat Per Diem

Flat Per Diem Allowances are automatically generated and calculated by the Archivum Travel System based on the following statutory parameters. Travelers, Travel Coordinators and Approvers should be familiar with these procedures insofar as they must understand when Flat Per Diem may or may not be requested and when meals should be deducted from the total daily allowances.

Per Florida statute, Flat Per Diem may be claimed for any domestic or foreign travel in lieu of claiming actual lodging receipts and daily meal allowances.

The \$80 daily rate is intended to reimburse for both lodging and meal expenses.

For figuring Flat Per Diem on the first and last days of travel, the travel day is divided into four quarters worth \$20 each. The total amount claimed for Flat Per Diem during which the traveler is traveling. (See chart on page 22.)

Flat Per Diem cannot be claimed in conjunction with *any* actual lodging or

Flat Per Diem Chart

Incidentals

Actual incidental expenses incurred while on USF business will be reimbursed. Since the University reimburses actual amounts per incident for these types of expenses, incidental per diem allowances

Travelers should use the most efficient and economical available parking. Valet parking will be reimbursed only when hotel or event location does not offer less expensive or free self-parking.

Portage will be re

Expenses Not Allowed

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V. RULES AND PROCEDURES-DOMESTIC MEALS AND LODGING

Meal Allowances for Domestic Travel are automatically generated and calculated by the Archivum Travel System based on the following statutory parameters. Travelers, Travel Coordinators and Approvers should be familiar with meal procedures insofar as they must understand when meals may or may not be requested and when meals should be deducted from the total daily allowances.

Domestic Meals

Domestic t

VI. RULES AND PROCEDURES-FOREIGN MEALS AND LODGING

Meal Allowances and maximum Lodging rates for Foreign Travel are automatically generated and calculated by the Archivum Travel System based on the following federal parameters. Travelers, Travel Coordinators and Approvers should be familiar with these procedures insofar as they must understand when meals and lodging may or may not be requested and when meals should be deducted from the total daily allowances.

Foreign Meals

Meals for all days of Foreign Travel will be reimbursed at the published Department of State rate for the destination area.

The allowance for incidentals that is listed with the published Department of State rates should be extended to arrive at the total allowance. Since USFR rates should

Foreign Lodging

There are no contracted or preferred hotels for USF Foreign travel. Lodging reservations should be made with any merchant in accordance with good purchasing procedures and Chapter 112.061, Florida Statutes.

Maximum allowable foreign lodging rates are determined by the U.S. Department of State, Foreign Per Diem Rates, Maximum Lodging Rate, for the particular city or region. The link to the U.S. Department of State web site is available on the USF Travel web site or at: https://aoprals.state.gov/web920/per_diem.asp .

If unique circumstances require that the nightly rate exceed the published U.S. Department of State rate, justification is required in Archivum Travel.

Foreign lodging will be reimbursed at

