

# Travel

## Travel

### Guideline Charge

Travel Costs on federally funded contracts and grants

### Purpose

The following guideline outlines the allowable costs for grants, contracts, and subawards at the University of Texas at Dallas (UTD). The policy is in collaboration of the Allowable Cost Policy, The University of Texas Travel Policy, and The Office of Management and Budget Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards (Uniform Guidance) 2 CFR 200 200.474. The Cost Accounting Standards (CAS) and OMB Uniform Guidance provide the basic criteria to determine allowability of travel.

### Guideline Statement

Travel is allowable as a direct cost when it provides direct benefit to the project. The terms and conditions of the individual agreement should be reviewed prior to incurring and/or processing any travel cost. When there is a conflict between university policy and award requirements, the most restrictive policy applies.

### Guidelines for Travel

#### Proposal/Budget

- The proposal should include a budget for foreign and domestic travel costs and explicitly state the justification for the travel.
- Travel is allowable as a direct cost where such travel will provide direct benefit to the project and comply with UTD, sponsor, federal and state policies and regulation.
  - With the exception of the Principal Investigator or Co-P.I., travel expenses can only be charged to a federal project when the traveler is exerting effort on the project during the time of travel.
    - Written sponsor approval is required to pay travel expenses on a federal sponsored project for a traveler that is not exerting effort on the project at the time of travel.
    - A Principal Investigator (PI) (including Co-PI) may charge travel expenses to the project at any time as long as the travel is approved by the project.
    - Costs for employees working on the project may include per diems or subsistence allowances, as well as other travel-related expenses, such as mileage allowances if travel is by personal automobile.
  - Travel charged to sponsored projects must be approved by the PI or the designees.
    - Before making travel arrangements, make sure that travel is allowed under the terms of an agreement or contract.
      - In some cases, the sponsor's written approval may be required prior to any trip.
    - If foreign travel is not listed in the approved budget, some sponsors require prior written approval.
      - In some cases, a sponsor will require prior written approval for foreign travel even if it is listed in the proposal /application.
      - All requests to obtain prior sponsor approval for travel on a sponsored project should be submitted through the pre-award office well in advance of the desired travel.
        - The request should provide information regarding the purpose of the travel, number of persons traveling, destination, number of days, and estimated cost.
      - Please see current Office of Sponsored Programs (OSP) Prior Approval System requirements for any travel changes exceeding the approved budget by \$1,000 or 25%, whichever is greater.

#### Domestic Travel

Domestic travel is travel performed within the recipient's own country. For the U.S., it includes travel within and between any of the 50 States of the U.S. and its possessions, territories, Canada and, in most cases Mexico.

#### Foreign Travel

- Foreign travel is travel outside of the United States, its territories and possessions, Canada and, in most cases, Mexico. However, for a foreign organization as described above, foreign travel means travel outside that country.
- The definition of foreign travel may differ from sponsor to sponsor. Therefore, each award must be examined for this definition.
- When an award is federally funded, the employee must comply with the requirements of the *Fly America Act*. Please see the *Fly America Act*.

#### Entertainment/Side trips

Entertainment costs are not reimbursable.

- Entertainment expenses include costs for meals other than the traveler, amusement, diversion, or social activities.
  - Meal expense is allowable and is not deemed entertainment when a business meeting discussing and/or collaborating on the research takes place. Justification must be provided.
  - In order to be deemed a meeting, there must be an agenda, a list of attendees, and their role in the project. These items must be provided with the reimbursement request.

## Meals/Alcohol

- Original itemized receipts must be submitted for all meals when claiming actual expenses, as opposed to per diem.
- Original receipts are not required in cases where the traveler claims per diem for meal expenses.
  - A traveler cannot claim both actual expense and per diem for meals on a single trip.
  - Please see the UTD's per diem rate for further information
- Meals for non-traveler. The cost for meals of a non-traveler or individual not specified in the award is not reimbursable as a travel expense.
- Alcohol is NOT an allowable expenses and must be deducted from meal receipts prior to submitting reimbursement.

## Lodging

- Policy allows for reimbursement of actual, reasonable expenses with itemized receipt/folio.
- Travelers are strongly encouraged to use standard accommodations at reasonably priced mid-market hotels or motels.

## Car Rental

- Rental cars should be used when they are less expensive than alternative means of transportation (e.g., taxi, car service, or train) or where there are convenience or safety issues that justify the additional cost.
  - Rental of up to a mid-sized car is an allowable expense.
  - Exceptions may be made if there are three or more employees traveling together, if the traveler is transporting sizeable equipment, or if there are other valid business needs. The exception must be documented on the traveler's expense report.

## Documentation

The Office of Post Award Management requires all paid original merchant receipts or invoices issued by the supplier or service provider to document and substantiate the business transactions. A digital image of the original receipt is allowable, provided that it is legible and the paper receipt is destroyed.

## Policy Links

Procurement Management – Travel Management

Uniform Guidance 2 CFR 200

Allowable Cost on federally funded Contracts and Grants

The University of Texas at Dallas Expenditure Policy (UTDBP3097)

OMB Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards (Uniform Guidance)

The Cost Accounting Standards (CAS)

The Office of Sponsored Projects

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