



University Travel Manual

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TRAVEL POLICY

7 - 02.8 Administrative policy regarding travel

- (A) Purpose. The university recognizes that travel is required in order to fulfill its mission and objectives. This policy establishes the framework for the university's travel regulations, the procedures for which are documented in the university travel manual.
- (B) Definitions.
- (1) "University business travel" for the purposes of this policy means travel that is undertaken to fulfill the university's mission and objectives. It includes movement from home or the primary work location to another destination and return to home or the primary work location. University business travel does not include the commute between an employee's home and primary work location.
 - (2) "University approved travel services provider" for the purposes of this policy means any vendor that the university has sourced, negotiated, and contracted through procurement to manage travel arrangements.
 - (3) "Travel expenses" for the purposes of this policy includes any travel-related expenses paid directly to a vendor by the university or reimbursed to a traveler.
 - (4) "Reimbursement" for the purposes of this policy refers to a payment made by the university to a traveler for expenses incurred while undertaking university business travel.
 - (5) "Travel services" for the purposes of this policy includes arrangements for air and ground transportation and lodging.
- (C) Scope.
- (1) This policy applies to all faculty, staff, students, and third parties who undertake university business travel.
 - (2) This policy applies to all sources of funds expended by the university.
 - (a) More restrictive travel policies and procedures may be specified by programs, schools, departments, centers or divisions. Restrictions on the payment of travel expenses may not be imposed that conflict with the applicable collective bargaining agreement.
 - (b) When sponsored program guidelines are more restrictive than this policy, the sponsored program rules apply. Travel expenses that do not conform with both this policy and the sponsored program guidelines will not be expensed to the sponsored program.
- (D) Implementation.
- (1) Authority and responsibility.
 - (a) All travel must be preauthorized by the traveler's department.
 - (b) All travel services must be purchased from a university approved travel services provider when one exists.
 - (c) Travelers must submit reimbursement requests within sixty days of incurring the expenses and no later than their last dates of employment with the university.
 - (d) Travel expenses must be supported with both statements of business purpose and itemized receipts or invoices that have been provided by the vendor for the services or products. Credit card statements or vouchers do not constitute "receipts" or "invoices."
 - (e) Departmental approvers are responsible for reviewing travel expenses to ensure policy compliance, accuracy, reasonableness, and proper documentation. Approvers are required to deny travel expenses that do not meet these standards.
 - (f) Principal investigators and others traveling on sponsored funds are to be familiar with the allowable cost provisions of their sponsored programs.
 - (2) University travel manual. All travel guidelines and procedures, including those governing travel expenses and university approved travel service providers, are in the university travel manual. The manual is located on the accounts payable website.
 - (3) Travel advances. Advances for a group or student travel must be authorized by the senior vice president for finance and administration. Advances of university funds for individual travel purposes are not permitted (exceptions to this rule are addressed in the university travel manual).
 - (4) All payments issued for travel advances and reimbursements will be issued via ACH (direct deposit).
 - (5) The university may designate third-party or procurement-contracted travel agencies as its exclusive travel agents. In such cases, university travelers must comply with the terms of the agreements with the travel agencies.
 - (6) Spousal and domestic partner travel. Travel expenses for an employee's spouse or domestic partner may be reimbursed if the spouse or domestic partner has a significant role in the proceedings or is involved in fundraising activities and the activities constitute a valid business purpose. Spousal and domestic partner travel expenses require approval of the president or the president's designee on a case by case basis.
 - (7) Exceptions. Exceptions to the rules set forth in this policy may be granted by the appropriate executive officer.
- (E) Violations. When a traveler fails to follow this policy or the procedures in the university travel manual, the university may refuse to issue direct payment or reimbursement for related travel purchases.

Policy Effective Date: Feb. 15, 2021

Policy Prior Effective Dates: 7/9/1998, 10/25/2000, 6/4/2003, 9/20/2005, 1/5/2007, 6/1/2007, 7/4/2008, 3/1/2015

TRAVEL GUIDELINES AND PROCEDURES

1.0 Introduction

Kent State University recognizes that travel is required in order to fulfill its mission and objectives. In order to support that goal, maintain appropriate stewardship of university resources, and ensure compliance with all applicable regulations, it has developed university business travel guidelines and procedures. The University Travel Manual is the authoritative source for those guidelines and procedures, which apply to all employees, students, and third parties who undertake university business travel.

Travelers are responsible for understanding and following all guidelines put forth within both the travel policy and the travel manual.

2.0 General Guidelines

2.1 Travel Preauthorization

All university business travel must be preauthorized by the traveler's department, regardless of the funding sources or methods of payment for the associated expenses.

Preauthorization for reimbursable overnight travel and air travel must be processed through Chrome River using a **preapproval report**. The traveler must enter the purpose, travel date(s), destination(s), and expected expenses on the preapproval report, as well as attach documentation for the proposed trip (e.g., a conference brochure.) Once complete, the report will be electronically routed to the traveler's supervisor, financial manager(s), and/or principle investigator for approval.

Preauthorization for non-overnight travel may be obtained using a Chrome River preapproval report or another method, as determined by the traveler's department.

2.2 Intercollegiate Athletics Travel

Travel related to Intercollegiate Athletics is subject to special rules and regulations and is administered by that office.

2.3 University Approved Travel Service Providers

Information about current travel service providers is found on the Procurement and Travel website, to assist in travel management support for faculty and staff of Kent State University. Booking through the current travel service provider has many benefits and can help departments save time and money on their approved travel. It can assist travelers by providing discounts with commonly used airlines, and other travel. It allows users to track unused tickets and credits. Travelers also benefit by having a travel agency that can assist when changes to travel itineraries are necessary. The provider can track, locate, and communicate with university employees should adverse weather or security threats arise during their travel.

2.4 Paying for Allowable Travel Expenses

Detailed information about allowable travel expenses can be found in section 4.0 [Allowable Travel Expenses](#).

The following table lists the payment method(s) can be used when booking the approved travel expense types. The three payment methods are: pcard (PC), expense reimbursement (ER), or through Accounts Payable (AP).

The decision as to which form of payment that may be used can be made at the department’s discretion, based on practicality. Please note, *at no time may a pcard, or other type of payment method, be used to pay for unallowable travel expenses.*

Chart 1: Acceptable payment methods by travel expense type.

Travel Expense Type	PC	ER	AP
Air travel (other than student group travel)	✓	✓	
Air travel (student group travel) <ul style="list-style-type: none"> Airfare for student travel (both academic and extracurricular) must be purchased via pcard or direct invoice through the current travel service provider, or another university-approved vendor. It is not a reimbursable expense for faculty/staff advisors/coordinators. Group airfare may exceed the pcard’s single transaction or monthly credit limit. The faculty/staff member who is coordinating the trip should provide an estimate of the airfare cost to the pcard cardholder. If necessary, the cardholder should complete a Pcard Maintenance Form for any requested increases to the pcard’s single transaction or monthly credit limit. The form must be signed by the appropriate executive officer (or that individual’s representative) and must be emailed to pcard@kent.edu no less than 24 hours before the purchase is to be made. When group airfare is purchased through a vendor that must be paid through Accounts Payable, a PO invoice or completed and signed payment request must be submitted before the vendor will be paid. 	✓		✓
Conference/training registration fees and materials	✓	✓	
Rail, bus, and other common carrier transportation fares	✓	✓	
Lodging <ul style="list-style-type: none"> When a pcard is used, the traveler and/or cardholder is responsible for contacting the lodging provider to ascertain its rental policies (e.g., whether it will rent lodging to a person other than the individual whose name is on the credit card that is paying for the rental and whether that card must be presented in person upon check-in.) 	✓	✓	
Meal per diem		✓	
Parking and tolls	✓	✓	
Personal vehicle mileage		✓	
Vehicle Rental <ul style="list-style-type: none"> When a pcard is used, the traveler and/or cardholder is responsible for contacting the rental agency to ascertain its rental policies (e.g., whether it will rent to a person other than the individual whose name is on the credit card that is paying for the rental and whether that card must be presented in person upon check-in.) 	✓	✓	
Visa/passport fees		✓	

2.5 Accountable Plan Rules

Per the IRS, expenses reimbursed under an accountable plan should not be included on an employee's Form W-2. The university has implemented the following rules to ensure that its reimbursement program is an accountable plan:

- Only expenses that have been incurred for university business expenses may be reimbursed.
- Travelers must submit reimbursement requests within 60 days of incurring the expenses and no later than their last dates of employment with the university.
- Excess travel advances and reimbursements must be returned to the university within five (5) days.

2.6 Travel Expense Documentation

Travel expenses (including all sponsored program expenses) must be supported with both statements of business purpose and itemized receipts or invoices that have been provided by the supplier for the services or products. Credit card statements or vouchers do not constitute "receipts" or "invoices."

The only exception to this rule is for transportation expenses. When a reimbursed transportation expense meets the following qualifications, it does not require a receipt:

- The individual expense does not exceed \$25, and
- The source of funding for the transportation expense **is not** a sponsored program

Requests to pay for or reimburse conference and other registration fees must be documented with an itinerary that states what is included in the fees (e.g., meals.)

The university has adopted the [Inter-University Council Record Retention Manual](#). This manual requires that expense documentation ("Accounts Payable" in the IUC manual), be maintained for four (4) years. In addition, documentation for expenses that are charged to sponsored programs ("Research Grants Files Awarded" in the IUC manual) must be retained for the life of the grant plus five (5) years.

2.6 Affinity Programs

Affinity programs allow consumers to accumulate points or credits, which they may use toward the purchase of the business's products or services.

The Ohio Ethics Commission, in Advisory Opinion No. 91-010, prohibits state employees and officials from receiving discounted or free "frequent flyer" airline tickets for personal travel if the ticket or benefits were obtained through the purchase of airline tickets for use on official university travel.

The university therefore prohibits its employees from receiving personal affinity program benefits (frequent flyer miles, hotel points, etc.) from any purchases made for university business purposes. **Any affinity program benefits accrued due to university business purchases must be used for future university business purchases.**

Similarly, the university will not reimburse employees for university business purchases made with personal affinity program benefits or awards. For example, a traveler who uses personal frequent flyer miles toward the purchase of airfare used for business travel purposes, will not be reimbursed for the value of the frequent flyer miles.

2.8 Financial Responsibility

If travel is cancelled, the traveler is responsible for the cancellation of all affected services. If a provider required a financial commitment upon booking and the traveler fails to provide adequate notice of cancellation:

- The traveler will not be reimbursed for the resulting penalty payment.
- The traveler will be required to reimburse the university for the resulting penalty payment if university funds were used for the prior financial commitment.

3.0 International Travel

3.1 International Travel Insurance

The Office of Compliance and Risk Management (Risk Management) must be notified every time a university employee travels out of the continental United States and Canada for university business travel.

Failure to give proper notification could result in non-coverage under the university's [AIG WorldRisk foreign travel insurance policy](#).

- Travelers who will be going to OFAC-sanctioned countries (e.g., Afghanistan, Cuba, Iran, Iraq, North Korea, Syria, etc.) must notify Risk Management **no less than 45 days** prior to traveling.
 - A copy of the OFAC license along with an itinerary including modes of transportation is also required.
 - It is the responsibility of each traveler to determine if the country they are traveling to is OFAC-sanctioned.
- Groups of 15 or more employees flying together on university business must provide a list of travelers to Risk Management **at least 30 days** before departure.
- All other foreign trips must be reported **within 10 days** of the departure date.
- If traveling with a spouse, child, domestic partner or volunteer, complete the [Non-University Employee Traveling With KSU Faculty/Staff form](#) and fax to Risk Management at 2-3662 or send through campus mail to Room 310 Harbourt Hall.

Once notification has been given, the traveler should print a copy of the [WorldRisk International Travel insurance card](#), which contains the university's policy number and emergency contact information.

3.2 Traveling with Students

All faculty who are traveling with students are required to register with the Office of Global Education.

The university encourages a university employee to travel with students.

4.0 Allowable Travel Expenses

4.1 Conference/Training/Event Registration

Fees associated with registering for a conference, training, or travel event are allowable travel expenses.

- Travelers are responsible for reviewing all registration information and understanding what is included in such registration fees. The university will not separately pay for or reimburse expenses that duplicate those included in registration fees.
- Requests to pay for or reimburse conference and other registration fees must be supported with an itinerary that states what is included in the fees (e.g., meals.).

4.2 Lodging

For university business travel purposes, payment or reimbursement for a lodging facility's standard single room rate may not exceed 150% of the federal lodging per diem per person, per night. Lodging expenses are allowable only when travelers are required to stay overnight at locations 50 or more miles from their homes or headquarters.

Domestic federal per diems by city are available on the U.S. General Services Administration's [Per Diem Rates website](#). Foreign federal per diem rates are available on the U.S. Department of State's [Foreign Per Diem Rates by Location website](#).

- The university's allowable room rate is that for the lodging facility's standard single room, subject to the stated maximum, exclusive of any applicable taxes.
- Lodging taxes are allowable travel expenses, with the following considerations:
 - When using a pcard to pay for lodging in Ohio, Connecticut, Florida, Idaho, Kentucky, Michigan, New Jersey, North Dakota, Tennessee, Washington DC, and West Virginia, the traveler should inquire as to the availability of a [state sales tax exemption](#). The university is generally not exempt from paying other taxes applied to lodging expenses (e.g., occupancy tax.)
 - Employees who self-pay for lodging will not be exempt from sales tax. In such cases, the sales tax is reimbursable.
- Many lodging facilities offer reduced rates for government employees. Travelers should inquire about such rates and be prepared to show university identification in order to be allowed to use them.
- Fees charged by lodging facilities for necessary business costs (e.g., WiFi, copying, etc.) are allowable travel expenses.
- Non-business expenses including room service meals, movies, games, laundry and other personal expenses are not allowable travel expenses.

- In situations where travelers choose to share accommodations, the maximum lodging threshold should be calculated based on the number of travelers per rental. This rule should be followed regardless of the type of lodging facility used (e.g., hotel, Airbnb, etc.)

Lodging Exceptions

Executive level approval is required for the following:

- Lodging that exceeds the 150% threshold. This may be allowable when:
 - The traveler is attending an event where the maximum benefit will be achieved by staying at the event's recommended lodging facility; or
 - Lodging accommodations in the travel destination area are not available at a cost below the threshold.
- Reimbursement of lodging less than 50 miles from a traveler's home or headquarters which are documented as occurring due to unusual and infrequent circumstances.

4.3 Meals

The university will reimburse travel meals only when overnight travel is required. Travel meal reimbursement is provided based on a per diem basis in alignment with the federal standard meal allowance rates.

Domestic federal per diems by city are available on the U.S. General Services Administration's [Per Diem Rates website](#). Foreign federal per diem rates are available on the U.S. Department of State's [Foreign Per Diem Rates by Location website](#).

- The standard meal allowance is the federal M&IE ("meals and incidental expenses") rate.
- Incidental expenses, which are included in the M&IE rate, include fees and tips for porters, baggage carriers, hotel staff, and staff on ships. Therefore, reimbursement of these types of expenses is unallowable.
- At the department's discretion, meal reimbursement may be made based on actual receipts. In these cases, the reimbursement may not exceed the applicable per diem.
- Alcoholic beverages are not an allowable travel expense.

Meals Provided at Functions

Meals provided at hosted functions (e.g., lunch provided by a conference) will not be reimbursed.

First and Last Days of Travel

Meal per diem for the first and last days of travel will be allowed based on the following schedules.

First Day

Departure:	Prior to 7:00 a.m.	7:00 a.m. to 11:59 a.m.	12:00 p.m. and after
Meal Allowance:	Breakfast, Lunch, Dinner	Lunch, Dinner	Dinner
Per Diem Rate Used:	Location where traveler will spend the night		

Last Day

Return:	Prior to 12:00 p.m.	12:00 p.m. to 4:59 p.m.	5:00 p.m. and after
Meal Allowance:	Breakfast	Breakfast, Lunch	Breakfast, Lunch, Dinner
Per Diem Rate Used:	Location where traveler last stayed overnight		

4.4 Transportation

Travelers are required to compare all the costs associated with each mode of transportation for their travel and select the one that is the most cost effective. The reimbursement for use of a privately-owned vehicle will be paid at the lower of a mileage allowance or accumulated airfare by coach for all individuals on approved travel status traveling in a privately-owned vehicle.

Personal Vehicle

The use of a privately owned vehicle will be reimbursed at the current IRS standard mileage rate.

- As stated in IRS Publication 463, the standard mileage rate is understood to include depreciation, lease payments, maintenance and repairs, gasoline (and gasoline taxes), oil, insurance, and vehicle registration fees related to business miles driven. Thus, such expenses will not be reimbursed.
- Mileage will not be reimbursed for travel between home and the primary work site (per human resource records), regardless of the day on which the travel occurs and the number of times that the traveler goes to work each week.
- When travel originates from home, the reimbursable mileage is equal to the distance between the traveler’s home and destination LESS the distance between the traveler’s home and primary work site.
- When travel originates from the primary work site, the reimbursable mileage is equal to the distance between the traveler’s primary work site and destination.

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- When travel originates from an alternate location (neither the traveler's home or primary work site), it should be listed as the start location only if the number of miles between the alternate location and the destination is less than the number of miles between the primary work site and the destination.
- Mileage will not be reimbursed for travel between buildings within each of the university's campuses and locations.
- An individual who uses a privately owned vehicle on university business must meet the liability insurance requirements of the motor vehicle financial responsibility laws of the state of Ohio.

Alternate Mileage Rates

- When required under the terms of a sponsored program agreement, an alternative mileage rate may be used.
- Travelers who receive a university vehicle stipend will be reimbursed at a reduced mileage rate.

Rental Vehicle

Fees associated with renting a vehicle for university business travel, as well as associated gasoline purchases, are allowable travel expenses.

- Employees are expected to use reasonable judgment and consider cost, availability, safety, and efficiency when selecting the appropriate vehicle class for business travel. Intermediate class is the standard reimbursable rate when a vehicle is rented to transport three or fewer travelers. When another class is chosen, the traveler must document the need and obtain preapproval.
- Rental expenses for luxury class vehicles are not allowable travel expenses.
- Uninsured motorist insurance should be purchased for rental vehicles. Most rental agencies include such coverage in their casualty insurance. All other insurance should be declined as the university's blanket auto insurance policy covers all other rental car insurance needs. If an insurance claim is necessary, the signed vehicle rental agreement must be filed with the Office of Compliance and Risk Management.
- Kent State employees renting vehicles outside the United States must purchase all local, statutory and optional insurance coverage offered by the rental car company, including collision damage waiver insurance .
- Only university employees are authorized to drive rental vehicles on university business. Student workers and graduate assistants are considered university employees.

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- Traveling students should have a university employee chaperoning their trip. Students operating a rented vehicle must have specific authorization by the department head.
- All employees and authorized students must complete a verification of valid driver's license through Records in Police Services in accordance to Policy #3342-5-12.5
- Should an accident involving a vehicle rented for university business occur, the traveler must, within 72 hours:
 - Notify the proper police agency
 - Contact the rental company office where the vehicle is on record
 - Contact the traveler's supervisor
 - Submit a completed [Equipment, Vehicle & Vessel Accident/Incident report](#) to the Office of Compliance and Risk Management at compliance@kent.edu, along with:
 - A copy of the vehicle rental agency's damage report
 - A copy of the vehicle rental agreement
 - A copy of the police report
 - Photos of the damage

Air Travel

Airfare must be purchased at the lowest cost economy/coach fare available that meets the business requirements of the trip.

- Travelers are expected to use reasonable judgment and consider total elapsed trip time, the number of connections, and the times of the flights when purchasing airfare. If doubt exists as to which airfare to choose, the traveler should seek advice from the appropriate supervisor or expense approver prior to making the purchase.
- Departments may, at their discretion, approve the purchase of business class airfare for international flights exceeding five (5) hours.
- Baggage fees and ticket change fees are allowable travel expenses when there is a reasonable business-related justification. Other airfare add-on and upgrade fees (seat assignments and upgrades, air WiFi, etc.) are not allowable travel expenses.
- Medical exceptions for upgraded travel may be granted by the employee's supervisor based on a valid statement from a medical professional, which should be renewed annually.

Sponsored Programs and the Fly America Act

The Fly America Act, or 49 U.S.C. 40118, prohibits using federal funds to pay (or reimburse) airfare paid to foreign air carriers. Travelers whose airfare will be charged to federal grants should consult the [U.S. General Services Administration's Fly America Act website](#) or principle investigator before making the purchase.

Other Transportation Expenses

- Coach fare for long distance rail and bus travel are allowable travel expenses when such travel is reasonable based on time and cost.
- Short-distance travel fare, such as that for shuttles, taxis (including services such as Uber and Lyft), buses, ferries, and subways, are allowable travel expenses when they are determined to be reasonable and necessary for business purposes.
- Transportation costs for parking fees and tolls are allowable travel expenses.
- Services that are personal in nature such as car washing, detailing, oil changes, etc. are not allowable travel expenses.
- Tipping for transportation service is allowable for up to 15% of the service cost.

4.5 International Travel Expenses

- Visa and passport fees related to university business are allowable travel expenses.