

Transportation Options in Travel Status – All Fund Types Guideline

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I. Title

Transportation Options in Travel Status – All Fund Types Guideline

II. Objective

Travel Guideline DIS-T-GL7 details what rules and processes to follow when booking transportation or seeking reimbursement for transportation when traveling on university business. The forms of transportation discussed in this Guideline include; air travel, personally owned motor vehicles, university-owned vehicles, and rental cars. This Travel Guideline does not apply to any transportation when UTA employees or students are traveling for personal reasons with personal funds.

A UTA employee or student traveling by rented or public conveyance is entitled to a transportation reimbursement equal to the actual cost of necessary transportation for performing official university business. Original receipts are required.

III. Scope

All UTA employees or students using transportation when traveling for UTA business.

IV. Guidelines

A. Responsibilities

1. The Traveler

- a. Plans all travel to achieve maximum savings and efficiency. Ensures that each travel arrangement is the lowest possible cost considering all relevant circumstances.
- b. Keeps necessary original receipts when traveling.
- c. Prepares, or delegates a university employee to prepare, the expense report when seeking reimbursement for transportation costs.
- d. Attaches necessary original receipts, itinerary, or other supporting documentation when submitting an Expense Report.

2. Department

- a. May adopt expense reimbursement and payment rates lower than the maximum rate. The department's employees must be notified in writing before the lower rates are implemented. The department is solely responsible for enforcing the rate.

3. Associate Vice President for Business Affairs and Controller (or designee)

- a. Reviews all exception requests related to this Travel Guideline.

B. Airfare/Air Travel

1. Requirements to use a travel agency for airfare.

Departments must use the University's contracted travel agencies, Corporate Travel Management North American, d/b/a Collegiate Travel Planners (CTP) or Anthony Travel, LLC (ATI), or the online booking tool (Concur) to book airfare unless an exception under B(2) is available¹. Airfare contracted through CTP, ATI or Concur will be charged to the University's Corporate Business Account and billed directly to the cost center or project designated in the required Travel Authorization (see UTA Travel Guideline DIS-T-GL2 *Pre-Travel Requirements – All Fund Types*).

All airfare travel must be planned and conducted to achieve maximum economy and efficiency considering all relevant circumstances while complying with the Guidelines set forth herein. Best practice is to purchase airfare 21 days or more before the date of departure. If specific circumstances prevent the ability to purchase that far in advance, efforts should be made to book airline tickets as early as possible. Use of CTP, ATI or Concur will assist travelers and confirm the best possible airfare based on contracted pricing and individual travel needs.

- a. Expense Report Requirement:
 - i. Flight Itinerary
 - ii. Airline Passenger Receipt

2. Alternative Cheaper Airfare

If a traveler finds airfare \$100 or more cheaper than through CTP, ATI, or Concur and neither CTP nor ATI can match that rate, the traveler may request an exception by submitting *Business Affairs Exception Tracker Request*. Business Affairs will review this request in accordance with [Section F](#) of this Guideline. The request should include a cost comparison: flight number listed on CTP and ATI, flight number listed with alternate fare, date and time, departure and arrival locations, and email(s) evidencing CTP's or ATI's inability to price match. The cost comparison must be for the exact same flights.

A traveler who has approval to use alternative airfare and is traveling internationally, must register with International SOS as outlined in UTA Travel Guideline DIS-T-GL4 *Outside Contiguous United States Travel – All Fund Types*.

Note: This is not available to federally funded travel seeking discounted airfare on a foreign carrier per the Fly America Act ([ref. Subsection 4. below](#)).

- a. **Expense Report Requirement:**
 - i. Approved Business Affairs Exception

3. Seat Upgrades

- a. **Upgrades Paid from University Funds**
 - i. To receive an accommodation, a traveler must provide University's dedicated travel agencies with documentation showing approval from the UTA ADA

Coordinator to receive upgraded air travel seating. A traveler must receive an approved accommodation from the UTA ADA Coordinator prior to traveling. Accommodations are not available retroactively.

- ii. Requests for travel accommodations for an upgrade in seating from Coach/Economy, due to a disability, must follow UTA Procedure [HR-E-PR-19](#) *Request for Accommodations Under the ADA & ADAAA Procedure*.
- iii. A BA Exception Request is not required.
- iv. Expense Report Requirement:
 - 1) Approved accommodation documentation

b. Upgrades Paid with Traveler's Personal Funds

Upgrades to preferred seating paid by the traveler using personal funds are at the discretion of the traveler and do not require an exception. These types of upgrades are not reimbursable, and will be handled by one of the following processes:

i. Full-Service Agent:

Traveler must inform the travel agent of their preferred seating request, and if available, traveler will be required to give the agent their personal credit card information to complete the booking.

ii. Concur:

Travelers cannot upgrade and pay for preferred seating within this portal. Instead, the traveler must use the "Comments to Agent" box that they would like a specific seat or preferred seat, and then finish the transaction. Travel agency will call/email the traveler after the booking is complete and obtain the traveler's personal credit card information for the upgrade.

4. Fly America Act – Use of Federal Funds for Airfare

If the travel is federally funded, the traveler must adhere to the [Fly America Act](#) and is responsible for their own compliance with the Act. Thus, each traveler must identify the source of funding for their travel before making air travel arrangements.

a. Requirements

A traveler using federal funding must use a United States (U.S.) flag carrier or a U.S. flag carrier under a code-share agreement.

- i. Compliance with the [Fly America Act](#) is achieved when the U.S. flag carrier's designator code is present in the area next to the flight number on the airline ticket, boarding pass, or on the documentation for an electronic ticket.
- ii. Code Sharing occurs when two or more airlines "code" the same flight as if it was their own. A U.S. airline may sell a seat on a foreign air carrier's flight. This seat is considered the same as one operated by a U.S. flag carrier as long as the U.S. flag carrier's designated code appears in the appropriate place.

b. Exception

- i. The U.S. Government has entered into several air transport agreements that allow federally funded travel the use of foreign carriers under certain circumstances. These agreements are called "Open Skies Agreements." A list of agreements can be found on [The U.S. Department of State website](#).

C. Personally Owned Motor Vehicle

- 1. Travelers will be reimbursed for mileage in accordance with [GSA Privately Owned Vehicle \(POV\) Mileage Reimbursement Rate](#), which is usually updated January 1 of each year. Archived mileage rates may be viewed by [POV Mileage Rate Archived](#). Mileage is based on the shortest, reasonable highway distance. Mileage between addresses (point-to-point calculation) may be derived from an employee's odometer reading, or by using any online mapping tool accepted for point-to-point mileage calculations. Documentation is required for all point-to-point mileage calculations.
- 2. Travelers must ensure that each travel arrangement is the most cost effective considering all relevant circumstances.
 - a. **Less than 5 hours:** Travel that is less than 5 hours one way from designated headquarters, as documented by an online mapping tool, does not require a cost comparison analysis.
 - b. **More than 5 hours:** If the one-way destination of travel is more than 5 hours from designated headquarters, as mapped

by an online mapping tool, the traveler must complete and submit documentation showing that cost comparisons were done prior to start of travel for the following modes of transportation:

- i. Airfare with/without Car Rental

Note: Airfare costs must be from CTP, ATI or Concur

- ii. Car Rental

Note: Car rentals costs must be from one the Auto Rental Agencies ([ref. Section E](#) below)

- iii. Total mileage, round trip, for personal vehicle

- iv. Any other means of transportation

- c. If the traveler did not use the most cost-effective course of transportation, Disbursements may limit reimbursement to the amount the travel would have cost had the traveler used the most cost-effective method.

Note: Mileage within designated headquarters does not need a cost comparison.

- 3. Reimbursement is not available for mileage between an employee's residence and their place of employment.
- 4. Reimbursement is not available for mileage incurred due to a traveler receiving inadequate directions or getting lost.
- 5. If a traveler is unable to conduct official university business due to the traveler's personal vehicle breaking down before reaching the business destination, mileage will not be reimbursable. Another employee may be sent to pick up the traveler where the vehicle is broken down. Mileage will be reimbursed to the second employee if both employees return to their designated headquarters regardless of whether the first employee conducted any official university business before the vehicle breakdown.
- 6. On a workday, mileage must begin and end at the employee's place of employment within designated headquarters, except where the cost of mileage from the employee's residence is less than or equal to travel from headquarters. The expense report must state that the mileage cost is less than or equal to headquarters. During non-working hours, employees may be reimbursed for mileage from their residence to the nearest airport. If another individual drives the

traveler to the airport, the traveler may claim mileage to/from the airport.

7. Except for the cost of airport parking or parking fees required for transaction of state business away from the place of employment, no additional expense incidental to the operation of such motor vehicle will be allowed.

a. Expense Report Requirements:

- i. Odometer Reading – UTA Form [BF-T-F3 Non-Overnight Mileage Detailed Report](#), or Online Mapping Tool
- ii. Cost Comparison, if more than 5 hours one-way
- iii. Statement, if mileage from employee's residence is \leq travel from headquarters

D. University-Owned Vehicle

Gasoline receipts paid for personally by an employee will be reimbursed when using university-owned vehicles. **Must submit receipts.** For rules and procedural guidelines for the operation of a university-owned vehicle see UTA Policy [CO-CV-PO-02 Use of University-Owned Vehicles](#).

Expense Report Requirements:

1. Receipt for purchase of gasoline (see [GSA website](#))

E. Auto Rentals

The University of Texas System has contracted with specific auto rental companies - Avis / Budget, Enterprise / National and Hertz. As such, all travelers **must** use the dedicated auto rental companies.

1. University travelers should reserve a car through CTP, ATI or Concur. This will ensure all travelers receive the University of Texas System contracted rates and insurance coverage at no additional charge. Additionally, all car rentals booked through CTP, ATI, or Concur will be charged to a Corporate Business Account, minimizing the traveler's out-of-pocket costs.
2. If reserving a car direct through a contracted vendor, provide the following rate identifier for the appropriate vendor. This will ensure the traveler receives the contract rate and the insurance coverage at no additional charge:

- a. Avis #S828002
 - b. Budget #R524102
 - c. Enterprise - #UTS226
 - d. National - #UTS226
 - e. Hertz - #CDP 2104580
3. Contracted car rentals cover only items deemed reimbursable by the State of Texas. Contracted rental rates include the Collision Damage Waiver (CDW) within the U.S.. When renting an automobile, the employee should refuse the CDW Insurance, since it is included in the contracted rental rate. If CDW is not refused, the University will not reimburse the duplicate charge. When other rental agencies are used (non-contracted agencies), the traveler risks paying higher rates that may not be reimbursed by the University.

Contracted rental rates do not include the Collision Damage Waiver (CDW) for international travel. It is highly suggested that the traveler elects for the CDW insurance in this case. The University will pay or reimburse for this charge when a rental car is expensed for travel internationally.

The State has ruled that the cost of personal accident insurance and safe trip insurance of personal effects coverage incurred in conjunction with car rentals are not a reimbursable expense.

4. A charge for an additional driver may only be reimbursed if incurred for a business reason.
5. If a traveler books a car rental outside of CTP, ATI or Concur, the Texas sales tax on rental cars is reimbursable as well as sales tax on rental cars imposed by other states. The traveler should present [The Motor Vehicle Rental Tax Exemption Certificate](#) (page 2 only) for rentals occurring in the state of Texas. The traveler will complete the following fields: (1) Exemption – Check “Public Agencies”; (2) Name of Organization – “University of Texas at Arlington”; (3) Signature – Traveler’s Signature; (4) Address of Traveler – University Department Address (Street and number, City, State and Zip Code).
6. UTA will not reimburse other insurance coverage or items, such as liability Insurance supplement (SLI), personal liability insurance (PLI), road hazard, GPS navigation systems, child booster seats, etc.

7. A detailed receipt/contract showing all options being claimed for reimbursement and the amount paid must accompany the expense report.
8. Gasoline purchased from a gas station for a rental car are reimbursable to the employee with a valid receipt.
9. Traveler must purchase gas prior to returning the rental vehicle. Travelers will not be reimbursed for fuel charges incurred by the rental car company for not returning the vehicle full of fuel, or for opting in for the purchase of gas at the car rental counter or while booking. If the rental is direct billed to the University, the traveler must repay the University for the additional fuel charges.
10. If a vehicle is rented one (1) day prior to the actual start date of a Travel Authorization or returned one (1) day after the actual end date of a Travel Authorization, an Exception to this Guideline is NOT required.

Rentals that occur more than two (2) days prior / after Travel Authorization dates must have an attached memo explaining in detail the benefit of this cost to the university. The memo must be signed by an executive leader of the paying unit.

11. Travelers who use a rented motor vehicle for both personal business and official university business will only be reimbursed for the portion of the rental charge that is attributable to official university business.

NOTE: The traveler must refuel the rental car at the conclusion of official university business and personal usage to ensure that fuel cost requested for reimbursement is only the fuel used for business purposes. The refueling receipt for personal use will also need to be provided as documentation and noted accordingly. If this is not done, the traveler might not be reimbursed all fuel expenses related to car rental.

12. Non-Contract Rental Car Vendors:

If you rent a vehicle from a non-contract rental car vendor, with a pre-approved exception, insurance may or may not be included in the base rental rate. Inquire at the time of rental if the contract insurance coverage is included. If it is not, you must purchase a collision damage waiver or a loss damage waiver. A charge for a liability insurance supplement, personal accident insurance, safe trip insurance, or personal effects insurance is not reimbursable.

a. Expense Report Requirements:

- i. Detailed receipt/contract
- ii. Receipt for re-fueling rented vehicle
- iii. Memo signed by the executive leader of the paying unit if the rental occurred more than 2 days before/after Travel Authorization dates. Memo must also explain in detail the benefit of the cost to the university.

F. Exceptions to This Guideline

There may be occasions when travelers need to request an exception (this applies only to chartfields following local rules). Exceptions to this Travel Guideline must be obtained prior to the start of travel, documented in writing and final approved by the Associate Vice President for Business Affairs and Controller, or designee. The request must be submitted using the **BA Exceptions Tracker Request** menu located in [UTA SharePoint](#). Each request should include detailed justification for the exception and the benefit to the University if the exception is granted. Documentation of the request and its disposition will be maintained in the Business Affairs online exception file. In every case the account administrator is responsible for ensuring that all travel and charges are appropriate, comply with the source of funds, and support the mission of the University.

NOTE: The circumstances of the request will be taken under consideration. Any exception ultimately granted does NOT alter the existing Travel Guideline and should not be construed as precedent for allowing repeated exceptions to the existing Guideline.

V. Definitions

Actual Expense: Expenses that are reasonable and appropriate to the circumstance. Personal expenses are not included.

Designated Headquarters: The area within a 25-mile radius of the city in which a state employee's place of employment is located.

Expense Report: The document used in UT Share to reimburse business travel expenses. Used to provide a detailed record of the travel expenses as well as identify the nature of the business conducted.

Personal Expenses: Expenses that benefit the employee or spender only and do not benefit the university either directly or indirectly. Includes inappropriate or excessive expenses that appear to be university related.

VI. Relevant Federal and State Statutes

Texas Administrative Code, Title 34 Public Finance, Part 1 Comptroller of Public Accounts, Chapter 5 Funds Management (Fiscal Affairs), Subchapter C Claims Processing – Travel Vouchers, [Section 5.22 State of Texas Travel Guidance](#)

Texas Government Code, Title 6 Public Officers and Employees, Subtitle B State Officers and Employees, [Chapter 660 Travel Expenses](#), *Travel Regulations Act*

[Fly America Act](#)

[GSA Privately Owned Vehicle \(POV\) Mileage Reimbursement Rate](#)

[Motor Vehicle Rental Tax Exemption Certificate](#)

[Open Sky Agreements](#)

VII. Relevant UT System Policies, UTA Travel Guidelines and Forms

UTA Policy [CO-CV-PO-02](#) *Use of University-Owned Vehicles*

UTA Procedure [CO-CV-PR-02](#) *Driving Records and Training*

UTA Travel Guideline DIS-T-GL2 *Pre-Travel Requirements – All Fund Types*

UTA Travel Guideline DIS-T-GL3 *Contiguous United States Travel – Local Funds Only*

UTA Travel Guideline DIS-T-GL4 *Outside Contiguous United State Travel – All Fund Types*

UTA Travel Guideline DIS-T-GL6 *Travel Agencies and Concur – All Fund Types*

UTA Procedure [HR-E-PR-19](#) *Requesting Disability Related Workplace Accommodations*

VIII. Who Should Know

N/A

IX. UTA Office(s) Responsible for Travel Guideline

Responsible Officer: Chief Financial Officer and Vice President

Sponsoring Department: Office of Disbursements

X. Dates Approved or Amended

August 1, 2019

September 18, 2020

June 24, 2021

August 30, 2021

April 19, 2022

April 1, 2024

XI. Contact Information

Questions regarding this Guideline should be directed to the Office of Disbursements at 817-272-2194, or email travelservices@uta.edu.

Send notifications of errors or changes to: travelservices@uta.edu