



Travel

 Gattton College of
Business and Economics

Pre-Approval Form

- All trips must be submitted through the Pre-Approval Form in FRANsys.
- Refer to FRANsys Travel for training or questions.



Travel - Policies

- Travel dates are based upon when University business starts and ends, the actual business location (distance from work address), and transportation schedules.
- Travel reimbursement must be reduced by any amounts credited to the individual by airlines, hotels, or other travel vendors. Airline tickets or other travel expenses acquired with airline frequent flyer or credit card points/awards are not reimbursable.
- Procard must be used to pay for all University business travel expenses when possible. If not, then a personal card can be used, and the traveler can be reimbursed.
- If your trip combines personal and business travel, then a procard cannot be used for flights or hotels. These charges will need to be placed on a personal card and reimbursed.



Travel Policies

- Prefer and encouraged to use UK Travel Service vendors for airfare, hotel (other than conference hotels), and rental cars.
 - AAA Corporate Travel Services
 - AAA agents are available 24/7
 - 859-323-5354, (800) 354-4514
 - corporatetravel@aaa-alliedgroup.com for domestic
 - international@aaa-alliedgroup.com for international
 - Service fees are associated with domestic airline ticket - \$28.00, international airline ticket - \$38.00, and no fee for hotel or rental car.
 - Concur Travel
 - Online self-booking tool, administered and supported by AAA Corporate Travel Services.
 - HelpDesk (877-463-0543)
 - Service fees are associated with domestic or international airline ticket - \$6.00, and no fee for hotel or rental car.
 - [How to book travel through Concur.](#)
 - Avant Travel
 - Agents are available 24/7
 - 859-233-0000
 - Service fees are associated with domestic airline ticket - \$28.00, international airline ticket - \$38.00, and no fee for hotel or rental car.



Travel Policies

- You do have the option of using an alternate vendor.
 - If you use an alternate vendor, Gatton prefers a cost comparison be done with UK Travel Service vendors
 - The University reserves the right to limit the reimbursement to what would have been paid had UK Travel Services been used.
 - Final itemized receipt is required as documentation, not just a confirmation. These can be difficult to obtain when booking with Priceline or Expedia type vendors.
- International airfare must be purchased through UK Travel Service vendors



Cost Comparison

- Must be done on the same day the actual ticket was purchased.
 - Through Concur Travel
 - Cost comparison must be printed on the same day as the ticket is purchased.
 - Ensure business-only travel search parameters are used based on the beginning/ending date and time of the business meeting.
 - On the flight options list, mark or highlight the itinerary/airfare that the traveler would hypothetically choose for official University business travel.
 - Ensure the print date shows on the cost comparison (which must match the actual ticket purchase date). It's best to run the cost comparison from Concur and then "print to Adobe", and then save the PDF - in this way, the date stamp will show on the cost comparison.
 - Through AAA or Avant Travel
 - Cost comparison email must be secured from AAA or Avant on the same day the actual ticket is purchased.
 - The email must show the hypothetical itinerary/airfare that the traveler would choose for official University business travel.



Local Travel

- Defined as less than 50 miles one way from the employee's work address or the traveler's residence, whichever is greater.
 - Does not qualify for an overnight stay or per diems.



Airline Tickets - Domestic

- There are three approved airports you can fly out from.
 - LEX Blue Grass Airport in Lexington, KY
 - CVG Cincinnati/Northern Kentucky International Airport in Hebron, KY
 - SDF Louisville Muhammad Ali International Airport in Louisville, KY
- The University reimburses coach class airfare.
 - With supervisor approval, business class airfare will be reimbursed for eight hours or more of uninterrupted flight service.
 - Reasonable ancillary fees including, but not limited to, expenses for convenient or early boarding, extended legroom, seat location, baggage, in-flight meals, and Wi-Fi service are approved at the supervisor's discretion.
- Airline expenses require the flight itinerary and ticket receipt as documentation.



Combining Business and Personal Travel

- Personal travel is identified as any choice the traveler makes other than purchasing a roundtrip ticket for official University business travel.
 - Includes travel dates, destinations, detours, upgradeable fares, originating airports other than the traveler's workstation airport
- Cost Comparison must be done on the same day the actual ticket was purchased.
- Airfare cost comparison for business-only travel and the actual ticket receipt must be submitted with the original airline receipt in FRANsys.



Combining Business and Personal Travel

- If the airfare quote for the ticket that combines business with personal travel is
 - less expensive than the cost comparison, then a procard can be used to purchase the ticket.
 - More expensive than the cost comparison, then a personal credit card must be used to purchase the ticket. The traveler will be reimbursed the cost comparison airfare.
- If a cost comparison is not secured, then a [Request for Historical Airfare Cost Comparison form](#) must be completed. Please contact your financial specialist to get this done.



Lodging

- Hotel expenses are limited to the business days of travel at the single room rate, including room tax and other business-related hotel fees (e.g., Wi-Fi or parking).
- The University procurement card can be used to make hotel arrangements/pay hotel room/tax expenses for official University business travel through any vendor (not limited to Travel Services).
- Personal travel meals (e.g., room service) or personal expenses (e.g. movies, mini-bars) are not allowed on the procurement card.
- A hotel folio must be provided for hotel expenses.
 - Itemization is required
 - Must show the name of the traveler, the name of the hotel, dates of arrival and departure, room rate, type of credit card used for payment, payment for hotel charges, and applicable taxes.



Lodging

- Airbnb's/VRBO's are allowable as long as they are reasonable to meet business needs.
 - Damage fees, additional guest fees, insurance or something not usually charged by hotels are the responsibility of the traveler.
 - If additional houseguests are included, get a quote that shows what the price of the Airbnb/VRBO would be with only one houseguest.



Lodging – Not your procard

- Payment when you use a procard that is not in your name.
 - Hotel reservations must first be made and guaranteed to a credit card.
 - Procard holder can then call the hotel to arrange for room/tax expenses to be charged to a procard that is not in the name of the hotel guest.
 - Each hotel has its own way of handling credit card authorizations.



Vehicles

- Employee driving for University business must have a [Motor Vehicle Record Release and Information Form](#) on file with Risk Management.
- Vehicle-related expenses are allowed
 - Parking, tolls, ferries, bridges, and tunnels
- Expenses not allowed
 - Repairs, towing, rental/mileage for sightseeing or other personal travel
- Payment of traffic and parking tickets is the responsibility of the traveler.



Personal Vehicle Travel

- Reimburse mileage for University business travel based on the actual driving distance by the most direct route.
- Mileage is reimbursed from the traveler's work station to the destination, unless driving from the traveler's residence is closer.
- Gasoline is not reimbursed



Rental Cars

- For domestic travel, additional insurance is not an authorized expense.
- For vehicles rented for international travel, additional insurance can be purchased.
- Procard can only be used if it is in the name of the person renting the car.
- If the renter does not have a card in their name, then payment will need to be made with a personal credit card. The renter will be reimbursed after travel is completed.
- Gasoline may be purchased when refueling a rental car while traveling on official University business.
 - Procard can be used
 - Personal card can be used, then reimbursed after travel is completed



Air vs Auto Cost Comparison

- When a traveler chooses to drive a personal vehicle or a rental car over 500 miles one-way
 - an airfare cost comparison must be done
 - Should be run at least 3 weeks prior to the start of travel, or as soon as the need for travel if inside of 3 weeks.
 - An [Air vs Auto Travel Expense Form](#) must be completed
 - Reimbursement will be the lesser of either your actual driving expenses (including lodging and meal per diem if the day is not your UK business travel day) or the estimated air expense total on the Air vs Auto Travel Expense Form.
 - Airfare cost comparison for business-only travel, the actual ticket receipt, and the air vs auto travel expense form must be submitted in FRANSys.



Other transportation

- Railroads, non-local buses, or commercial vessels may be utilized when they provide the lowest-cost transportation option available.
- Ground transportation
 - Personal vehicle mileage will be reimbursed to the traveler's departing airport.
 - Other forms of ground transportation to/from the departing airport (such as taxis or ride-sharing services) can be used in lieu of personal vehicle mileage.
 - At the destination, expenses for buses, subways, taxis, and ride-sharing services are reimbursable.



Meals and Per Diem

- Meals and incidental expenses for domestic and foreign travel are paid using per diem rates established by the U.S. federal government (CONUS or OCONUS), based upon the traveler's destination for that date.
- The University will reimburse meals and incidental expenses incurred on the first and last days of travel at 75% of the standard per diem rate regardless of what time of day the travel begins or ends.
- The procard should not be used to pay for individual meals when traveling.
- Meal per diem cannot be claimed for meals included in registration fees or otherwise provided at no cost to the traveler as part of the event.
- Laundry expenses, baggage tips, housekeeping tips, and other lodging-related tips are considered incidental and are covered by the per diem rate and, therefore, are not reimbursable.



Business Meals when Traveling

- Breakfast, lunch, or dinner meetings when in travel status to conduct University business may be reimbursed for the actual meal cost instead of the per diem.
 - Please include a list of attendees, a business purpose, an agenda, and/or an event flier.
- Registration and conference meals included within the registration fee may be charged to the procard for official University business travel.
 - In these instances, meal per diem cannot be claimed
 - Please include the conference agenda.



International Travel

- All international airline tickets must be purchased through UK Travel Services' AAA Corporate Travel Services, Concur Travel, or Avant Travel.
- Must be registered in the University's [International Travel Registry](#) before departure.
 - These include official University business, conferences, research, community service, and sabbaticals.



International Travel

- Due to COVID-19, there may be restrictions on international travel.
 - Check the [international website](#)
 - There are currently no restrictions for UK Faculty and Staff
 - International travel by faculty and staff who are accompanied by students remains restricted in some countries.
 - Travel plans with students should be submitted at least 6 weeks before the planned departure date to the Director of Global Risk & Strategic Operations, Jason Hope at jasonhope@uky.edu
 - UK faculty and staff who are not U.S. citizens or permanent residents may be subject to additional U.S. immigration review and should consult with UK's Office of International Student & Scholar Services at iss@uky.edu
- Should be aware that many countries continue to implement border restrictions, quarantine periods, and testing requirements.
 - It is essential for travelers to understand the landscape in their destination country so that they are prepared for any logistical challenge



International Travel

- Certain expenses for international travel are reimbursable.
 - These include visas and immunizations recommended by the CDC.
 - Students may be reimbursed for UK's required travel medical insurance if they are traveling in their capacity as a University employee



Over 60 Day Taxation

- Must complete and approve the Concur Travel Expense report for all business expenses within 60 calendar days of the date when business travel ends.
- If submitted over 60 days, then a [over 60 day taxation](#) form must be completed.
 - If there is documentation to support your expenses being submitted prior to 60 days, we can note that on the form and can be submitted as exemptions from taxation.
 - If there is no documentation or if exemption is not approved, then your travel reimbursement will be processed as taxable wages.



Documentation

- Receipts must contain
 - Vendor Name
 - Detail listing of purchase
 - Item description
 - Quantity
 - Price
 - Transaction date
 - Make sure the receipt is clear and readable
 - Business purpose/explanation for the purchase



Business Purpose

- The 5 W's can help you determine if the expense meets the criteria of a University business purpose.
 - Who: The documentation must note specifically who the expense is for.
 - What: The University needs to know what type of event or activity occurred, or what was purchased. All receipts or invoices must be itemized.
 - Where: Document where the business activity took place.
 - When: Document when an event occurred.
 - Why: Most importantly, substantiate why the expenses are reasonable and appropriate for the university. The “Why” should include the primary reason for the expense.



Upload to FRANsys

- Upload each receipt into FRANsys.
- For questions on how to use FRANsys, please refer to the FRANsys training.



Concur

- You do not build your own report in Concur.
- Please make sure you complete your [user profile settings](#) in Concur.
- Please make sure you have added the business office staff as delegates in Concur.
 - [How to Add Delegate for Concur](#)
- Your financial specialist will pull your transactions from FRANSys and build the report.
- You will be notified when it is ready to submit.
- Please review the report. Ask your financial specialist if you have any questions. Then submit the report for approval.



Helpful Links

- [Travel Services](#)
- [Travel Arrangements](#)
- [Concur Travel & Expense Management](#)
- [E-5-1 Reimbursement of Travel Expenses](#)



Training

- Available in myUKLearning
 - Concur Online Booking Tool
 - Travel Services
 - FAST Travel
 - Concur: Review and Complete User Profile Settings



Questions?

- Any questions reach out to the business office.
 - Susannah Aulds
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