Travel and Transportation Administration and Expenses

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APPENDIX
POLICY

.100 POLICY STATEMENT

It is OUS policy to reimburse employees for expenses incurred while traveling on official OUS business. Such reimbursement is subject to all applicable statutes, regulations, bargaining agreements, contracts, policies, procedures, and budget availability.

This policy supercedes FASOM sections 11.01, 11.02, 11.03, 11.05, and 11.06, with links to the Federal Out-of-State Localities Eligible Table (11.04), the Travel Reimbursement Rates summary (11.10), and the Oregon Mileage Chart (11.11) located in the appendix.

.110 POLICY RATIONALE

OUS seeks to ensure that the policies and procedures related to administration of travel and transportation are documented, communicated, clearly understood, and consistently applied.

.120 AUTHORITY

- ORS 278.405 Department to Manage Risk Management and Insurance Programs; Rules
- ORS 283.310 Control and Regulation of State-owned Motor Vehicles
- ORS 283.395 Driving state-owned vehicles for private purposes prohibited; rules
- ORS 283.990 Penalties
- OAR 125-155-0000 State Vehicle Use and Access
- OAR 580-040-0030 Vehicle Safety Rule
- OAR 580-046-0035(6)(d) Foundation and Institution Operational Procedures, Gifts, Accounts, Institution Support, Contracts
- GSA (U.S. General Services Administration) Privately Owned Vehicle (POV) Mileage Reimbursement Rates
- IRS Publication 463, Travel, Entertainment, Gift, and Car Expenses
- IRS Publication 1542, Per Diem Rates

.130 APPROVAL AND EFFECTIVE DATE OF POLICY
The reformatting of the policies mentioned in section .100, Policy Statement, into this one comprehensive policy was approved by the Associate Vice Chancellor for Finance and Administration/Controller on March 29, 2010.

.140 KNOWLEDGE OF THIS POLICY

All Chancellor’s Office and institutional personnel should be knowledgeable of this policy.

.150 DEFINITIONS

Charter Services: Airlines that do not participate in franchised airline reservation systems (e.g., Southwest).

Commercial Lodging: Travel requiring overnight absence from an employee's official station during which expenses arising from the use of commercial lodging are expected.

Common Carrier: Any air, land, or water motorized conveyance operated under a license for the transportation of passengers for hire for which a ticket is issued.

Foreign Travel: Travel to or within foreign countries. For determining reimbursement rates, travel to or within Puerto Rico, the Northern Mariana Islands or U.S. Possessions is considered non-foreign overseas travel. For determining account codes, travel to or within Puerto Rico, the Northern Mariana Islands and U.S. Possessions is considered foreign travel.

In-State Travel: Travel to or within the state of Oregon. Includes travel to Oregon originating outside the state of Oregon.

Non-Commercial Lodging: Travel requiring overnight absence from an employee's official station during which non-commercial lodging is used (e.g., camping equipment, recreational vehicle or private home).

Non-Foreign Overseas Travel: Non-Foreign Overseas travel comprises travel to or within Alaska, Hawaii, Puerto Rico, the Northern Mariana Islands and U.S. Possessions. When traveling to or within Alaska and Hawaii, use out-of-state travel account codes. When traveling to or within Puerto Rico, the Northern Mariana Islands, and U.S. Possessions, use foreign travel account codes.

Official Guests: Official guests are deemed by appropriate University personnel to be guests of the University with a related appropriate purpose. Official guests can include, but are not limited to, visiting speakers, visiting faculty, diplomatic or dignitary guests, public figures, candidates and their accompanying family members, and performing artists.

Official Station: The city, town or other location to which an employee is assigned (see also Tax Home).
Out-of-State Travel: Travel to or within the United States, but outside the state of Oregon. For determining reimbursement rates, travel to or within Alaska and Hawaii is considered non-foreign overseas travel. For determining account codes, travel to or within Alaska and Hawaii is considered out-of-state travel.

Per Diem: Reimbursement for lodging, meal and incidental expenses for a 24-hour period.

Tax Home: Generally, your tax home is your regular place of business or post of duty, regardless of where you maintain your family home. It includes the entire city or general area in which your business or work is located. If you have more than one regular place of business, your tax home is your main place of business.

If you have more than one place of work, consider the following when determining which one is your main place of business or work.

- The total time you ordinarily spend in each place
- The level of your business activity in each place
- Whether your income from each place is significant or insignificant

(See also Official Station.)

Unrestricted Air Travel: Airline travel for which there are no restrictions on ticket purchase (e.g., seven- or fourteen-day advance purchase, Saturday night stay or non-refundable provisions).

.160 RESPONSIBILITIES

[1] The Oregon State Board of Higher Education

The Oregon State Board of Higher Education has authority over the OUS travel and transportation policy including the establishment of OUS travel reimbursement rates.

[2] Chancellor’s Office

The Chancellor’s Office negotiates and awards several travel-/transportation-related contracts at the System-wide level. These contracts are developed with guidance from the Directors of Business Affairs and are administered by the Chancellor's Office.

The Controller’s Division within the Chancellor’s Office monitors several federal government web sites, which serve as the basis for adjustments made to travel reimbursement rates. It is the responsibility of the Controller’s Division to apprise the OUS Chief Bargaining Officer of these rate changes, and to document and communicate these rate changes to OUS institutions.

[3] Institutions

The institutions are responsible for ensuring that travel and transportation expenditures comply with OUS policy. The OUS travel and transportation policy provides that each institutional
president has the discretion to establish his/her institution's rates below the OUS rate. If the institutional president exercises this option, a copy of the institutionally approved rates will be submitted to the Controller's Division prior to implementation. If the institutional president does not exercise this option, the OUS rates apply.

.170 APPROVAL

Travel expenses will be reimbursed provided the trip is approved in advance by authorized campus personnel. Travel authorizations may be verbal or written, subject to campus policy. Blanket authorization for a series of trips may be approved. Employees whose duties require frequent or continuous travel are considered to have advance approval when travel is within the usual limits of their duties. If campus policy requires a written request, and when several employees travel together with the same itinerary and similar expenses, one request for travel authorization may be submitted for the group.

.180 PERSONS ELIGIBLE FOR TRAVEL-EXPENSE REIMBURSEMENT

[1] Employees

OUS employees may be reimbursed for expenses incurred in connection with official travel.

[2] Employees on Leave

Reimbursement for travel expenses incurred during sabbatical or other types of leave is warranted only in exceptional circumstances.

[3] OUS Board Members and Unpaid Members of Advisory Committees

OUS Board members and unpaid members of advisory committees may be reimbursed for actual and reasonable expenses, including mileage and gratuities of up to 15% of meal costs.


Reimbursement is limited to travel expenses for personal interview and must be approved in advance by authorized campus personnel. Prior approval by authorized campus personnel is required if reimbursement includes accompanying family member(s)' travel expenses.

[5] New Employees

New employees may be reimbursed for travel and moving expenses when reimbursement is necessary to employ qualified personnel. (See Fiscal Policy Manual 66.200, Moving Expenses Policy.)

New employees teaching a single term only may be reimbursed for travel expenses associated with one round trip when reimbursement is necessary to employ qualified personnel. Advance approval by authorized campus personnel is required for new employees.
[6] Students

Students who travel as employees or officially designated representatives of a campus may be reimbursed for travel expenses.

[7] Employees of Other State Agencies

Employees of other state agencies should be reimbursed for travel expenses by their own agency. OUS campuses should then reimburse the other state agency for the travel expenses.

[8] Non-Employees and Volunteer Workers

Individuals not covered by this policy, section .180[1] through [7], may only be reimbursed for travel expenses incurred in conjunction with providing a service to a campus through a formal or informal contractual relationship.

.190 TRAVEL-EXPENSE REIMBURSEMENT REQUEST

Travel expenses may be reimbursed by paying either the traveler or the vendor. When employees travel together, it may be expedient for one employee to pay and claim reimbursement for certain expenses of other employees. Reimbursement for multiple employees is only allowed when actual expenses are being reimbursed and are supported by receipts. Deductions are made from the per diem amounts for employees involved. Requests to reimburse travel expenses must be made on the campus travel reimbursement request form. Requests for reimbursement must be accompanied by receipts, if required. (See sample travel reimbursement request form, appendix section .700.)

.200 TRAVEL CARDS (CORPORATE CARDS) AND TRAVEL ADVANCES

OUS has contracted with US Bank to provide travel cards which US Bank refers to as "corporate cards." These corporate cards are issued to eligible employees who are approved by US Bank.

[1] Eligibility

Any employee who may have reimbursable travel expenses is eligible for a corporate card. US Bank conducts a credit evaluation prior to issuance of cards.


Employees' use of the corporate card is limited to business travel and other business-related expenses. Business travel expenses include lodging, meals, car rental and miscellaneous expenses incurred while traveling for business purposes.

Card holders have Automated Teller Machine (ATM) access through the corporate card. ATM draws should be used to meet cash needs for miscellaneous travel expenses for which the
corporate card cannot be used. Travel advances may be allowed subject to campus policy. ATM draws should be limited to use for business purposes.

[3] Responsibility for Charges

The employee is solely liable for charges to his/her account in accordance with the agreement between US Bank and the employee.

[4] Payment of Charges

The full amount on the US Bank monthly statement is due on receipt. US Bank assesses late charges in accordance with the charge card agreement, and may terminate a delinquent employee's account.

[5] Termination or Transfer

US Bank corporate cards are valid only while cardholders are employees. A card is invalid on termination. The campus travel coordinator should be notified when a cardholder terminates or transfers to another OUS campus.

.210 TRAVEL AGENCY SERVICES

Each university establishes campus policies and procedures for the purchase of airline tickets. The campus may purchase tickets from a variety of sources or it may develop contracts with one or more travel agencies. Price, service, and administrative cost are major factors in the university's purchasing decision.

.220 STUDENT AND TEAM TRAVEL

[1] Student Travel

OAR 580-40-0030 provides guidelines regarding transportation of students in a state owned, leased or controlled vehicle.

[2] Athletic Teams and Student Groups

[a] Travel Expenses of Others

When one OUS employee, such as a coach, athletic director or group leader, pays for the travel expenses of the team or group members, do the following when preparing the travel reimbursement request.

- Keep non-employee travel expenses separate from those of employees.
- Include an attachment that provides a detailed itemization of each employee's expenses.
Include a vendor receipt for meals provided to team or group members. If no receipt is available, such as when individuals are provided cash to buy their own meals, a list of the individuals' names, their signatures, and the amounts disbursed is required.

[b] One-Day Trips

Meal expenses for an athletic team or student group on a one-day trip may be reimbursed at actual cost. A receipt is required. Coaches, trainers or group leaders who accompany and are responsible for the care, custody or control of the team or group are also eligible for meal-expense reimbursement. The request for reimbursement must state that the expenses result from a trip by an athletic team or student group.

.230 TRAVEL PAID BY OUTSIDE SOURCE

Outside entities may reimburse the campus, pay a service provider directly, or reimburse an employee for travel expenses related to OUS business. If the service provider is paid directly, or if reimbursement is made to an employee, documentation should be maintained in the campus travel records. Documentation should include the traveler's name, identity of the outside source, travel destination, travel dates and OUS business purpose. If reimbursement is made to the campus, it should be accounted for as a reduction of expense.

When a travel reimbursement payment is made by the foundation, it must be reported by the foundation to the president annually as required by OAR 580-46-0035(6)(d).

.240 TEMPORARY VERSUS INDEFINITE TRAVEL ASSIGNMENTS

Reimbursement of travel expenses for "temporary" assignments are generally not taxable to the employee if less than one year. If the assignment is "indefinite", the employee is considered to have moved to the new work location. Reimbursement of expenses for "indefinite" travel is taxable. (For additional information, see IRS guidelines).

.250 MEAL AND INCIDENTAL EXPENSES

[1] General

Generally, meal and incidental expenses are reimbursed at a per diem rate. (See Summary of Travel and Transportation Rates, appendix section .710.) Meal and incidental expenses may be reimbursed only if the traveler qualifies for lodging-expense reimbursement, except as noted herein.

[a] Proration of meals & incidental expenses per diem for partial days involving an overnight stay

Meal per diems for initial day of travel and final day of travel will be based on the following schedule based on departure and arrival times:
For the day the traveler leaves on a trip, the per diem rate specified for where the traveler will spend the night is used. For the day the traveler returns from a trip, the per diem rate specified for the last location where the traveler stayed overnight is used.

Applicable meal and incidental expense per diem may not be claimed if a meal is provided at a hosted function (e.g., a conference registration fee includes a meal). The per diem rate for a full day's meal and incidental expenses is apportioned as follows:

- breakfast: 25%
- lunch: 25%
- dinner: 50%.


Reimbursement for meals at actual expense is only allowed when hosting official guests and groups, for athletic team and student group meal expenses, and for OUS Board members and unpaid members of advisory committees. When actual meal expenses are reimbursed, an itemized receipt is required. A gratuity of up to 15% of each meal expense may also be claimed. The receipt must separate the meal cost and the gratuity paid. When the receipt shows only the total charge, the traveler should write in the meal and gratuity amounts. When a single reimbursement is requested for multiple employees, all employee's names should be identified on the receipt. No alcohol expenses are reimbursable with state funds.

Athletic team meal expenses exceeding the OUS per-diem rate require documentation as to the reason for the excess and documented approval of the athletic director or the associate athletic director to whom the coach reports. Student group meal expenses exceeding the OUS per-diem rate require documentation as to the reason for the excess and documented approval of the department head.
[3] Meals on One-Day Trips

When a traveler departs and returns the same day, meal expenses are reimbursed only in the following cases:

[a] When traveling as an OUS Board member or unpaid member of an advisory committee

[b] When a meal at a convention, conference or meeting is part of the agenda and the cost of the meal has not previously been paid with the registration fee

[c] When directed or required to attend mealtime business meetings, including community or public relations meetings

[d] Trips by athletic teams and student groups

Lunches on one-day trips will not be reimbursed except in circumstances [a] - [d] listed above.

The IRS considers breakfast and dinner allowances, figured on the basis of hours worked (such as those permitted under [e] – [f] below, to be taxable to the employee. If such breakfast and dinner allowances are paid, the existing account code 28502 - Overtime Meal Allowance - may be used.

[e] When an employee leaves his/her official station two or more hours before his/her regular work shift, s/he will receive the breakfast allowance

[f] When an employee returns to his/her official station two or more hours after his/her regular work shift, s/he will receive the dinner allowance

[4] Incidental Expenses

Incidental Expenses are combined with meals into a single rate.

OUS references IRS Publication 463 (Travel, Entertainment, Gift, and Car Expenses) for the definition of incidental expenses.

The term "incidental expenses" means:

Fees and tips given to porters, baggage carriers, hotel staff, and staff on ships.

Incidental expenses do not include:

Expenses for laundry, cleaning and pressing of clothing, lodging taxes, costs of telegrams or telephone calls, transportation between places of lodging or business and places where meals are taken, or mailing cost of filing travel vouchers and paying employer-sponsored charge card billings.
.260 LODGING

Lodging expenses are normally reimbursed when authorized campus personnel determine that the traveler would not reasonably be expected to return to his or her residence between work shifts. Generally, lodging is reimbursed at per diem rates, although campus policy may require receipts for lodging. Exceptions (e.g., conferences) may be reimbursed at actual and reasonable cost with appropriate documentation. Exceptions other than conferences should be rare. Campus policy applies regarding pre-approvals. Campus policy applies regarding exceptions for reimbursement of lodging at actual and reasonable cost for the Portland Metropolitan area. Lodging receipts required.

[1] Lodging Receipts Requirements

When an exception is approved for reimbursement of actual lodging expenses, receipts are required and must show the following:

- Traveler's name (or names)
- Date(s) occupied
- Room number
- Number of persons occupying the room
- Single room rate
- Actual amount paid

If the single room rate is not shown, a note on the receipt stating the single room rate and signed by the traveler or authorized campus personnel is acceptable.


Taxes on lodging are not included in the per diem rates. If actual lodging costs are reimbursed, the amount itemized on the travel claim for lodging should be the total expended for lodging including taxes.

[3] Non-commercial Lodging

The intent of the non-commercial lodging per diem is to reimburse travelers using non-commercial facilities (e.g., travel trailer, motor home, or staying with friends or family members) and should result in an economic benefit for the university. For short- or long-term travel, in or outside of Oregon, refer to the Summary of Travel and Transportation Rates, Appendix section .710, for the daily per diem rate. It is intended that the non-commercial lodging rate apply for any overnight stay away from home that does not take place in a commercial lodging establishment and which is provided for the employee.

.270 MISCELLANEOUS EXPENSES
Necessary business-related travel expenses are normally reimbursed. Personal expenses are not reimbursed. OUS establishes the definition of miscellaneous expenses. All miscellaneous expenses must be itemized.

Necessary miscellaneous business-related expenses are not reimbursed using a per diem; rather, if the traveler has incurred a miscellaneous business expense as outlined below, that expense is reimbursable at the actual cost. (See Summary of Travel and Transportation Rates, appendix section .710, for receipt requirements.)

[1] Commercial Ground Transportation Normally Reimbursed

(See Summary of Travel and Transportation Rates, appendix section .710, for receipt requirements.)

- Taxicab
- Airport Shuttle

[2] Checked Baggage

(See Summary of Travel and Transportation Rates, appendix section .710, for receipt requirements.)

Up to 2 standard-weight bags (standard weight as defined by the airline used)

[a] Charges for the following may be reimbursed only when approved by authorized institution personnel (receipts required):

- additional baggage (more than 2 bags)
- overweight baggage


(See Summary of Travel and Transportation Rates, appendix section .710, for receipt requirements.)

- Telephone which includes one long distance call to a family member on the first day of travel and alternating days thereafter; campus policy applies regarding length of call or dollar limits
- Fax
- Internet
- Postage
- ATM cash advance fees, up to the amount charged by the state travel card contract
- Traveler's check fees
- Materials and supplies purchased to meet an immediate business need
- Visa and passport expenses
- Parking
- Tolls
- Lodging taxes
- Energy surcharge


In general, expenses are not reimbursed unless specifically identified as reimbursable. The following are some expenses not normally reimbursed:

- Home-to-office travel
- Deviations from the most direct and usually traveled route
- Expenses incurred because the employee is accompanied by a spouse/partner or family members

.280 IN-STATE MEALS, INCIDENTAL EXPENSES, AND COMMERCIAL LODGING

[1] Meals and Incidental Expenses

Meals & Incidental Expenses per diem is determined using the federal rate in the IRS's High-Low Substantiation Method. All Oregon cities are currently classified as "low." In-state travel meals and incidental expenses will be reimbursed at the rates and under the terms stipulated in the Summary of Travel and Transportation Rates, section .710 of the appendix. No receipts are required.

[2] Commercial Lodging

Commercial Lodging per diem is determined using the federal rate in the IRS's High-Low Substantiation Method. All Oregon cities are currently classified as "low." In-state commercial lodging will be reimbursed at the rates and under the terms stipulated in the Summary of Travel and Transportation Rates, section .710 of the appendix. Campus policy applies regarding whether or not receipts are required.

Portland exception: Institutional policy applies regarding exception for lodging at actual and reasonable cost for the Portland Metropolitan area (lodging receipts required).

[3] Rate Changes and Timing

The IRS normally revises high-low per diem substantiation rates on a federal fiscal year basis (October 1). When the IRS changes the rates on October 1, employers have an option to continue to use the current rates and begin using the new rates from January 1 through December 31. In these circumstances, the OUS practice is to implement the new rates effective January 1, unless expressly determined to implement at an earlier effective date.

.290 OUT-OF-STATE MEALS, INCIDENTAL EXPENSES, AND COMMERCIAL LODGING
Meals and Incidental Expenses per diem is determined using the federal rate in the IRS's High-Low Substantiation Method. Cities listed on the Out-of-State (Continental U.S.) High Cost Localities table (see appendix section 730) are classified as "high" cities. All cities not listed on the table are classified as "low" cities. Out-of-state travel meals and incidental expenses will be reimbursed at the rates and under the terms stipulated in the Summary of Travel and Transportation Rates, section 710 of the appendix. No receipts are required.

For the day the traveler leaves on a trip, the per diem rate specified for where the traveler will spend the night is used. For the day the traveler returns from a trip, the per diem rate specified for the last location where the traveler stayed overnight is used.

Commercial Lodging per diem is determined using the federal rate in the IRS's High-Low Substantiation Method. (See Out-of-State [Continental U.S.] High Cost Localities table, appendix section 730.) Out-of-state commercial lodging will be reimbursed at the rates and under the terms stipulated in the Summary of Travel and Transportation Rates, section 710 of the appendix. Campus policy applies regarding whether or not receipts are required.

The IRS normally revises high-low per diem substantiation rates on a federal fiscal year basis (October 1). When the IRS changes the rates on October 1, employers have an option to continue to use the current rates and begin using the new rates from January 1 through December 31. In these circumstances, the OUS practice is to implement the new rates effective January 1, unless expressly determined to implement at an earlier effective date.

FOREIGN MEALS, INCIDENTAL EXPENSES, AND COMMERCIAL LODGING

Foreign travel comprises travel in foreign countries. It does not include travel in Alaska, Hawaii, Guam, and other U.S. possessions. (For non-foreign travel rates, see Maximum Per Diem Rates Outside the Continental United States, appendix section 750.) If any foreign travel is reimbursed at actual cost, show a credit card statement with conversion to U.S. dollars.

Meals & Incidental Expenses per diem is determined using the federal rate in the Foreign Per Diem Rates by Location, published by the Department of State. (See Foreign Per Diem Rates by Location, appendix section 740.) No receipts are required.

Commercial Lodging per diem is determined using the federal rate in the Foreign Per Diem Rates by Location, published by the Department of State. (See Foreign Per Diem Rates by Location, appendix section 740.) No receipts are required.
Location, appendix section .740.) The per diem rate includes tax. Campus policy applies regarding whether or not receipts are required.

[3] Rate Changes and Timing

The Department of State updates these rates at the beginning of every month. OUS policy is to use the published rates for the period of travel.

.310 NON-CONTINENTAL U.S. AND OVERSEAS NON-FOREIGN AREAS (e.g., Alaska, Hawaii, Guam, and other U.S. possessions)

[1] Meals and Incidental Expenses

Meals & Incidental Expenses per diem is determined using the federal rate in the Maximum Per Diem Rates Outside the Continental United States, published by the Per Diem Committee. (See Maximum Per Diem Rates Outside the Continental United States, appendix section .750.) No receipts are required.

[2] Commercial Lodging

Commercial Lodging per diem is determined using the federal rate in the Maximum Per Diem Rates Outside the Continental United States, published by the Per Diem Committee. (See Maximum Per Diem Rates Outside the Continental United States, appendix section .750.) Lodging tax is reimbursed as a miscellaneous expense. Campus policy applies regarding whether or not receipts are required.

[3] Rate Changes and Timing

The Per Diem Committee updates these rates once a year or as necessary. OUS policy is to use the published rates for the period of travel.

.320 TRANSPORTATION

Transportation expenses incurred while traveling on official business may be reimbursed. Personal expenses, such as private vehicle repair and maintenance, may not. The following expenses may be reimbursed or paid directly:

- Private-vehicle mileage allowance
- Common carrier fare
- Necessary fees for a taxi, shuttle service, or rental vehicle
- Parking and garage fees

.330 PRIVATE VEHICLES

Travel including business trips in the vicinity of the official station may be authorized in advance subject to campus guidelines.


An employee carrying passengers while using a private vehicle for business travel must comply with campus rules regarding passengers.


Mileage for the most direct, usually traveled route may be reimbursed.

[a] Highway mileage

Use standard mileage guides, odometer/tripometer readings, or online mapping tools (e.g., Mapquest.com). Explain substantial deviations from standard distances or usual routes. When a trip starts, or ends, at the employee's residence, use the shorter of the residence-to-destination and official-station-to-destination distances.

[b] Local mileage

Travel between work places and travel between lodging and restaurants for a traveler's sustenance, health and comfort may be reimbursed, if meals cannot be obtained at the temporary duty or lodging sites. Travel for personal reasons or entertainment may not be reimbursed.


See Summary of Travel and Transportation Rates, appendix section 710, for the mileage allowance for use of a private vehicle on official business.


Travel may be authorized when it benefits the campus. Expense reimbursement is for use of the vehicle regardless of the number of passengers.


Employees and agents authorized to use their privately owned vehicles for official business are required to have personal automobile liability insurance to provide the primary coverage for any accidents involving that vehicle. State-provided automobile liability coverage will apply on a limited basis after the employee's primary coverage limits have been used. The state does not provide physical damage, uninsured motorist and personal injury protection for personal vehicles.
For additional information, contact the campus risk coordinator.

.340 COMMON CARRIER FARES

Transportation by common carrier is recommended when it is more appropriate and economical than travel by state or private vehicle. Common carriers are usually preferred for out-of-state travel. Actual cost is paid or reimbursed for airline, railroad and bus fares for travel.

[1] Railroads

Reimbursement will be made for the lowest available rail fare (usually coach class). A roomette is allowed when sleeping accommodations are needed due to overnight travel. A bedroom is allowed if no roomette is available or if special accommodations are approved because of the trip's nature or the traveler's health.

[2] Bus Lines

Scheduled or charter buses may be used.

[3] Taxis and Shuttle Services

Taxi and shuttle service is authorized between terminals, lodgings, and work stations.


The traveler should use the lowest cost, including all cost factors, flight that meets his/her needs. All domestic airline tickets should be purchased from the contract travel agency(ies) unless it can be documented that a ticket can be purchased for a lesser amount from another vendor.

[5] City-Pair Airfares

The State of Oregon has contracts with various airlines for unrestricted fares. In order to purchase airline tickets through the City-Pair program, the purchase must be made through the State of Oregon's contract travel agency or with a travel agency under contract with the university and registered with the City-Pair program airlines.

[6] Travel Awards and Frequent Flyer Mileage

All employees are required to travel using routes, schedules and airlines that provide the lowest rates and most efficient travel. Because the cost of record-keeping outweighs any monetary benefit, OUS will not recapture airline bonuses awarded employees for frequent flyer miles. Frequent flyer bonuses may be used by employees as they choose unless the terms of a grant or contract require otherwise.
[7] Payment in Lieu of Air Travel

When air travel is appropriate for out-of-state travel, an employee may request in advance to travel by private vehicle in order to combine vacation with official travel. In such a case, an employee may be reimbursed for the following costs associated with air travel between his or her official station and destination:

- The cost of round-trip commercial air fare that would have been incurred. The contract travel agency provides air fare quotes.
- Private vehicle mileage to and from the air terminal that would normally be used for departure.
- Lodging, meal and incidental expenses that the employee would normally incur with air travel.

[8] Split Billings

When OUS is paying only a portion of an airline ticket, the travel agency splits the bill. This can occur because the employee is combining business and personal travel, because of budgetary constraints, or because a third party is paying a portion of the cost. OUS is charged its appropriate portion and the traveler or third party is billed the balance. The travel agency may charge an additional fee for split billings. If the split billing is due to combined personal travel or due to budgetary constraints, the additional fee must be paid by the traveler.

.350 VEHICLE RENTAL

Vehicle rental expenses may be reimbursed. A car, boat, aircraft or other vehicle may be rented when it is the most economical/efficient means of transportation. Receipts are required for vehicle rentals. Rental cars may be used in conjunction with travel by common carrier when use is reasonable and authorized in advance. OUS personnel will normally rent compact or economy vehicles. Each university will establish its own standard as to when vehicles other than compact or economy (such as "green" class) may be rented. Campuses may have established credit cards or contracts with major vehicle rental companies. These credit cards can be used for direct billing of rental charges. Employees are also encouraged to use their corporate travel cards when renting vehicles because of the primary Collision Damage Waiver (CDW) coverage provided.

[1] State Insurance on Rented Vehicles

The state provides coverage for rental vehicles if they are to be used exclusively for official business. A certificate of insurance may be obtained from Risk Management Division, Department of Administrative Services, if required by an auto rental company in the U.S. or the Canadian authorities. At the time of rental the employee or agent should purchase the Limited Damage Waiver (LDW), also known as CDW, if it is available, unless one of the two following methods is used for the vehicle rental (as these two methods already provide LDW coverage):

- renting with the corporate credit card, and
- renting under the state's contract with Enterprise rent-a-car (reference the OUS rate code established with Enterprise).
The cost for the LDW is reimbursable.

If the employee or agent plans to travel outside the United States, its territories and possessions, and Canada, the department should contact the campus risk coordinator for help in obtaining the appropriate coverage.

If a rental vehicle is to be used for a mix of personal and business purposes, neither the state nor the corporate credit card provides any coverage and a certificate of insurance will not be issued. The employee's or agent's coverage applies. The employee or agent will want to check with his/her insurance agent to ensure that his/her coverage extends to mixed business and personal usage.

[2] Responsibilities After an Accident

The renter of a vehicle involved in an accident is responsible for immediately reporting the accident to his or her campus.

.360 LOANED VEHICLES

Use of loaned vehicles may be authorized when it benefits the campus. Expense reimbursement is for use of the vehicle regardless of the number of passengers. Some companies may lend vehicles to campuses, departments or individuals for specified purposes. The operator is reimbursed for actual out-of-pocket expenses arising from using the vehicle for official business.

[1] State Insurance on Loaned Vehicles

The state provides coverage for loaned vehicles if the campus has agreed in writing to accept responsibility for any liability or damage to the vehicle. The loaned vehicle must be used for official business.

For additional information, including the loan agreement form, contact the campus risk coordinator.

.370 STATE-OWNED VEHICLES

Campus and state motor pool vehicles may be used for official state business only. Use of a state vehicle is not authorized when costs are charged to Agency Funds, except for use by Campus Organizations or for other legitimate state business purposes as approved by authorized campus personnel. The department that authorizes a state vehicle's use is financially accountable for damages and all costs resulting from violations of policies relating to state vehicle use.

[1] Private Use Prohibited

Using a state-owned vehicle for private purposes or allowing another person to do so is prohibited (ORS 283.395) and punishable, upon conviction, by a fine (ORS 283.990).
Campus rules apply subject to guidelines established by OAR 580-040-0030.

Vehicle Safety Including Authorized Drivers

Overnight Parking at Employee's Residence

A state vehicle may be kept overnight at an employee's residence when doing so is approved in advance by authorized campus personnel.

Gasoline Purchase

Gasoline is generally available at state motor pools and designated dealerships by credit card.

.690 CONTACT INFORMATION

Direct questions about this policy to the following offices:

<table>
<thead>
<tr>
<th>Subject</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>General questions from institutional personnel</td>
<td>Institution Office of Business Affairs</td>
</tr>
<tr>
<td>General questions from institutional central administration and Chancellor's Office personnel</td>
<td>Chancellor's Office Controller's Division</td>
</tr>
</tbody>
</table>

.695 HISTORY

03/29/10 - Reformatted and Approved for Fiscal Policy

05/19/10 - Updated

06/16/10 - Updated

07/15/10 - Updated

08/17/11 - Updated

Policy Last Updated: 01/01/14

APPENDIX
.700 FORM(S)

- Sample Travel Reimbursement Request Form

.710 SUMMARY OF TRAVEL AND TRANSPORTATION RATES

- Effective January 1, 2013
- Effective January 1, 2014

.720 OREGON MILEAGE CHART

- Oregon Mileage Chart in Excel format

.730 FEDERAL OUT-OF-STATE (CONTINENTAL U.S.) HIGH-COST LOCALITIES ELIGIBLE TABLE(S)

- Effective January 1, 2013
- Effective January 1, 2014

.740 FOREIGN PER DIEM RATES BY LOCATION

The Foreign Per Diem Rates by Location are available on the U.S. State Department web site, http://aoprals.state.gov/web920/per_diem.asp, and are updated monthly.

- On the page linked above, select the country from the drop-down box and click "Go."
- The rates will be shown for the current publication date. To see rates for a previous month, select the month from the drop-down box and click "Go."
- Lodging tax is included in the lodging per diem.
- The U.S. State Department site lists foreign localities and corresponding per diem rates in U.S. Dollars.
- Some per diem rates vary depending on the time of year.
- Use the per diem rate that corresponds to the dates of travel.

.750 MAXIMUM PER DIEM RATES OUTSIDE THE CONTINENTAL UNITED STATES

The Maximum Per Diem Rates Outside the Continental United States are available on the Department of Defense web site, http://www.defensetravel.dod.mil/site/perdiemCalc.cfm, and are updated once a year or as necessary.

- In the "OUTSIDE CONUS" section, do the following:
  - Select the country/state from the "COUNTRY/STATE" drop-down box
  - Select the month and year from the "PUBLISHED" drop-down box
  - Select "Exclude" pertaining to Military Installations
  - Click "Execute"
- Lodging tax is NOT included in the lodging per diem and IS reimbursed as a miscellaneous expense.
• The Department of Defense site lists per diem rates in U.S. dollars.
• Some per diem rates vary depending on the time of year. Use the per diem rate that corresponds to the dates of travel.
• The meals and incidental rate is the sum of the two columns "local meals" and "local incidental."

.995 HISTORY

03/29/10 – Approved
05/19/10 – Updated
4/25/12 - Updated
1/1/13 - Updated
11/25/13

Appendix Last Updated: 01/01/14