



CON TRAVEL POLICIES/PROCEDURES

POLICIES

- 1) All University travel policies must be followed. The CON business office will review all trips prior to approval to ensure policy adherence. Check the UK Business Procedures Manual for more information regarding travel <https://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/bpm/E-5-1.pdf>
- 2) Arrangements for traveling should not and will not be made until all required approval levels are received for the trip
- 3) Traveler's will need to obtain a Procard in their name. Procards can only be issued to employees that hold a regular Faculty/Staff position. Temporary status employees are not eligible to obtain a Procard
- 4) If you choose to make your own travel arrangements, you must work with the CON travel expert to ensure all applicable policies are followed. Failure to do so could have negative financial impacts.
- 5) If a business-related airfare is cancelled and results in an airfare credit issued in your name, the credit cannot be applied to a personal airfare purchase. The credit must be applied to the next business-related trip in coordination with the CON travel expert.
- 6) Any airfare originally purchased on a grant that results in a credit, the original expense will have to be transferred by the business office to a College funded account.
- 7) All international trips require pre-approval from UK's International Center Airfare cannot be booked until the travel agency has this approval on file

PROCEDURES

For the best possible outcome for your trip/reimbursement - **Contact CON Travel Expert Kevin Garland @ 257-4617 or kevin.garland@uky.edu**

- 1) Obtain and completely fill out the travel request form based on the following criteria that is applicable to your trip
 - a. Create the travel request in via the Concur Travel & Expense Management System located in the employee self-service tab in the myUK portal. Training materials can be found at: <https://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/travelrequest.pdf>
 - b. If your trip doesn't contain reimbursable expenses you will need to complete the CON employee travel request (excel) form. <https://www.uky.edu/nursing/about-us/our-faculty/facultystaff-governance-resources>

see blue.

- 2) Provide all details related to the travel
 - a. *Title of workshop, conference, other:* Please do not use abbreviations (e.g., AAHFA, NIH. AHA). Use the complete names/titles to avoid delays caused by the need to ask for clarification.
 - b. Determine appropriate funding source. The 10-digit account # will need to be provided.
 - i. For Concur requests --- If multiple funding sources apply please enter primary funding source account# and provide additional accounts in the comments area
- 3) Estimate the cost of the trip
 - a. *Total anticipated cost of the trip:* Please provide good estimates if your total reimbursement is 10% or \$250 greater than the estimated total that has been pre-approved a 2nd round of approvals will be necessary
Any exceptions to the travel allowance cap must have prior approval before the travel is booked.
 - b. Mode of travel
 - i. *Airfare:* Estimates can be obtained by contacting the CON travel expert, using the concur system, contact your administrator's support person, or check with a UK approved travel agent (AAA 859-323-5354; Avant 859-233-0000) to estimate costs.
 - ii. *Ground Transportation:* Estimate the cost of taxi's, buses, shuttles, uber, lyft and metro system fees to/from the airport and/or from your meeting site. Transport to/from **ALL MEALS** is not an allowable expense
 - iii. Personal vehicle or auto rental in lieu of other ordinary transportation will be allowed only with written justification, approved in advance by the reporting administrator.
 - iv. Auto rental for trips less than 500 miles one way do not require the above-mentioned additional justifications/approvals
 - v. Insurance for collision or comprehensive damage on rental vehicles is not an authorized expense, as it is covered by the University's Actual Cash Value Comprehensive & Collision coverage plan. Must have MVR on file with Risk Management
 - c. *Hotel:* Provide an estimate based on the full cost (including taxes and other fees) of the room for of the hotel.
 - d. *Per diem:* Determine the per diem that is allowed for the travel location. You can do this by going to http://www.gsa.gov/Portal/gsa/ep/contentView.do?contentId=17943&contentType=GSA_BASIC per diem is determined based on the city you lodge in along with the time of day you leave/return. To be reimbursed for the meals (breakfast, lunch and dinner) you must be in travel status the entire time frame designated for each meal.
- 4) Obtain Approvals
 - a. Please allow up to 3 working days for this initial approval to ensure timely airfare purchases. Note – Changes may be requested/needed, and this will result in rerouting for approvals
 - i. Approvals for travel requests entered via Concur will route for approvals electronically upon submission (traveler, supervisor, business office)

- ii. Submit the CON Employee travel request form to conorders@uky.edu. The business office will review and route this form for approval signatures
 - b. Once fully approved you will be notified by the CON Travel expert
- 5) Travel arrangements
 - a. The CON Travel Expert will process all travel arrangements and pre-pay your registration, lodging and airfare expenses. Pre-payment of travel arrangements will be paid using a valid Procard in the traveler's name.
 - b. If you elect to book your own travel arrangements, you will need notify and work with the CON travel expert to ensure compliance.
- 6) Reimbursement
 - a. Per University policy all reimbursements must be submitted to the accounts payable division within 60 days of your return. Travel reimbursements submitted later than 60 days will be paid through payroll and be subjected to taxes.
 - b. All documentation and itemized receipts excluding meal receipts should be submitted as a pdf file to the Business Office within 10 days of your return. Itemized receipts must be provided to avoid delays in processing your reimbursement. Retain the originals for your records.
 - c. The lodging expenses for the room and taxes will be pre-paid on your university procard. Other expenses incurred at the hotel will be the responsibility of the traveler to pay at the time of check out. Please be sure to include the lodging receipt with your other reimbursable receipts and circle any charges that are personal and not appropriate for reimbursement (e.g., alcoholic beverages, food from the mini bar, movie rentals).
 - d. Reimbursement can be expected within 10-15 working days from the time you submit your completed packet to the business office with all appropriate documentation, provided the reimbursement is error free
 - e. Follow this link to learn how to track the status your reimbursement report.
<https://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/workflow.pdf>