

**HEALTH SCIENCE CENTER HANDBOOK OF OPERATING PROCEDURES**

|                     |   |                 |   |
|---------------------|---|-----------------|---|
| Chapter 6           | Fiscal Policies and Procedures  | Effective:      | May 2000                                      |
| Section 6.2         | Travel Policies and Procedures  | Revised:        | September 2008                                |
| <b>Policy 6.2.9</b> | <b>Authorization to Travel for Employees, Students, and Residents</b> | Responsibility: | Assistant Vice President for Business Affairs |

## **AUTHORIZATION TO TRAVEL FOR EMPLOYEES, STUDENTS, AND RESIDENTS**

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### **Policy**

Authorization is required in advance for travel from the city or town where the employee is regularly stationed while on University time or business whether or not reimbursement is expected. Authorization is handled using a PeopleSoft travel requisition. Personal travel using vacation leave for the entire trip does not require departmental approval.

Departments must complete a PeopleSoft travel requisition for faculty, staff, interns, students, and residents for all travel on University time or business away from the individual's headquarters city. Intra-city travel does not require a PeopleSoft travel requisition. A PeopleSoft travel requisition must be completed for periods of time away from the duty point in travel status during an employee's normal working hours even if there is no travel expense to the University. Detailed information requirements follow.

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### **Documentation Required**

#### Header Info Panel:

1. Name or Vendor ID number: Traveler's name or PeopleSoft vendor ID number.
2. Contact Name/Ph: Name and phone number of person to be contacted if there are any questions about the travel requisition.
3. Project ID No.: Source of funds used to pay for expenditures, only one Project ID may be used per requisition.

#### Lines Detail Panel:

4. Category: CatID number which references the proper expenditure account number for the travel expense. When TR300 for foreign travel is selected, the requisition will be flagged as a foreign travel request and must be routed to the Executive Vice President for Business Affairs for approval.
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5. Long Description: Basic description of expenses to be reimbursed.
6. Price: Include the estimated amount of each expenditure line.
- a. Public Transportation: Estimate for taxi, train, subway, bus, rental car, and airfare. Use State contract rental car rates, unless destination does not have contract agencies or cars available, and State contract airfare (if one exists) or lowest coach airfare. Travelers are expected to use the lowest coach airfare for which they qualify.
  - b. Mileage: Estimate for personal car mileage.
  - c. Per Diem for Days: List the number of days paid for by department. Lodging is not estimated for the last day of the meeting. The estimate for meals and lodging is based on allowable expenses for the destination and account used as follows:
    - Out-of-state destinations: Meals and lodging not to exceed rates based on city/state destination for State funds & Federal/State Grant fund groups (14XXX, 15XXX, 21001, 4100X-43XXX, 23055, 23056, 23065, 23066, 23070 and 44087-44099).
    - In-State destinations: Lodging not to exceed \$80 and meals not to exceed \$30 for meals for State funds & Federal/State grant fund groups (14XXX, 15XXX, 21001, 4100X-43XXX, 23055, 23056, 23065, 23066, 23070 and 44087-44099).
    - All destinations: Actual meal & lodging cost for designated MSRDP/DSRDP funds (221XX and 222XX).
    - All destinations (except foreign travel) – Meals and lodging combined not to exceed \$180 a day for private grants & non-State, non-Federal fund groups (44080-44086, 48XXX, 35001, 230XX – except 23055, 23056, 23065, 23066, 23070 and 44087-44099).

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- Foreign travel other than Canada & Mexico – Actual expenses for meals and lodging for all fund groups except State funds (14XXX, 15XXX, 23055, 23056, 23065, 23066, and 23070).
- d. Other Allowable Expenses: Estimate for cost of books, videos, tapes, passport fees, fax charges, and other miscellaneous costs.

### Travel Panel:

7. Disposition of Work While Away: Name of person who will cover traveler's job duties. If appropriate, use 'In Abeyance'.
8. Traveler on HSC Payroll during trip: Check if traveler will remain on payroll during trip. Leave unchecked if traveler is taken off payroll for this trip or if traveler is a University student or resident, and is not on the payroll.
9. Honorarium Received: Check if an honorarium or consultant fee will be received. Complete and submit a [Request for Approval of Outside Employment, Consultation, or Related Activities](#).
10. Send REQ to Travel Agency: Check if the requisition should be transmitted to a contract travel agency. Note: If this box is not checked, the requisition will not be transmitted to the travel agency.
11. University paid travel (UPT) airfare: If UPT will be used, indicate the estimated amount of the airfare.
12. Travel Agency: Select a travel agency if you have flagged the Send REQ to Travel Agency field.
13. Prepaid registration fee: Amount of any prepaid registration fees paid via a [Local/State Voucher](#).
14. Prepaid room deposit: Amount of any prepaid room deposit paid via a [Local/State Voucher](#).

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15. Primary Travel Requisition: Include the requisition number of the primary travel requisition. This information is necessary when preparing a “follow-up” requisition for the same trip to cross-reference secondary requisition to the primary travel requisition.
  16. Country/City/State: Destination country, city and state for trip.
  17. Start/End Date: First and last date of the trip. If the dates will cover travel within Texas for the year, then the Health Science Center fiscal year should be used for non-expiring accounts (September 1 – August 31). If the account is a grant, then use the starting and ending time for that grant. Dates are limited to one year at a time. Authorizations that cover more than one absence from headquarters and cover 12-month time period are called “blanket” authorizations; estimate for all potential travel costs. A “blanket” authorization cannot be used for UPT airfare or travel advances.
  18. Type: Indicate whether the portion of trip is B for business or P for personal.
  19. Purpose/Benefit:
    - a. List the specific name of meeting, conference, or other business.
    - b. Describe the specific benefit to the department, the University, and/or grant. (Example: Obtained information that will aid the employee in the discharge of teaching, patient care, research, or administrative responsibilities). A benefit to a grant must be specific to the research of that particular study.
    - c. Acceptable reasons for travel are: to benefit the department and the Health Science Center, to benefit the purpose of a grant or contract, to present original research; and/or to recruit faculty or other employees.

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**Approvals Required**

The approvals required for the PeopleSoft travel requisition will be established by the Access Control Executive (ACE) within each department. The two types of PeopleSoft approver roles are Administrator and Project Manager. The Project Manager is the authorized signature for the requisition, while the Administrator is considered to be a reviewer. Both must approve a requisition before it can be processed. If the requisition involves Foreign Travel, the approver will be prompted to route the requisition to the Executive Vice President for Business Affairs for approval. The Executive Vice President for Business Affairs must approve all foreign travel. A hard copy of the approved travel requisition must accompany the [Travel Voucher](#) when submitting to the Accounting Office.

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**Revised Travel Requisition**

A revised PeopleSoft travel requisition must be prepared for the following:

1. change in dates;
  2. change in destinations; or
  3. change in purpose or benefit.
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