

OSU INSTITUTE OF TECHNOLOGY  
POLICY & PROCEDURES

<b>Travel</b>	<b>3-023 FISCAL SERVICES November 2020</b>
---------------	--

POLICY

1.01 The purpose of this policy is to:

- A. provide a framework for safe and efficient travel while on official university business, and
- B. ensure university resources for travel are appropriately utilized.

1.02 This policy applies to all travel by OSU Institute of Technology (OSUIT) employees, including student employees, and non-club student travel for official university business. When students engaged in club sponsored activities are involved, see *4-013 Student Club/Organization Travel Policy*.

1.03 Responsibility of Administration

The Vice President of Fiscal Services (VPFS) shall be responsible for overall administration of this policy and may assign members of his/her staff to be responsible for compliance, oversight and necessary recordkeeping. Any exceptions to this policy must be granted by the VPFS or his/her designee.

1.04 Travel is defined as authorized official university business away from campus, including the travel time to and from the destination.

Commencement/Termination of Travel Periods for Reimbursement of Meals and Lodging, from OSF Procedures Manual:

- A. *Standard 24-Hour Travel Rule.* Reimbursement for meals and lodging expenses shall not extend more than 24 hours before and/or more than 24 hours after the date/time the object of travel (e.g., meeting, workshop, conference, etc.) began and/or ended. Title 74, O.S., Section 500.9. E. Exception to the "24-hour travel rule" may be allowed in cases where a savings in travel costs is available through the purchase of discount airline tickets in connection with weekend commercial airline flights (see *1.04 A* and *1.04 B* below).
- B. *Standard 48-Hour Travel Abroad Rule.* For purpose of meals and lodging expenses reimbursement, official travel in areas outside of the United States may start as early or end as late as 48 hours before/after the objective of the trip. We interpret "... official travel in areas outside of the United States ..." to mean official travel to areas outside

OSU INSTITUTE OF TECHNOLOGY  
POLICY & PROCEDURES

the contiguous United States, thus travel to Hawaii, Alaska and other possessions of the U.S., (e.g., Puerto Rico, U.S. Virgin Islands, etc.), would be included under the 48-hour travel abroad rule. Title 74 O.S., Sec. 500.9. F.

- C. *Special 48-Hour Extended Rule.* In order for the state through its employees to take advantage of special weekend cost saving air fares, reimbursement of expenses may be allowed to start up to 48 hours before and/or extend 48 hours after the date of the object of travel under the following conditions:
1. Notwithstanding any savings involved, the extra day of travel must be a weekend day, i.e., Saturday or Sunday. For example, if the purpose of the trip:
    - a. Begins on Monday/Tuesday, reimbursement status cannot begin earlier than Saturday/Sunday, respectively, and/or
    - b. Ends on Thursday/Friday, reimbursement status cannot end later than Saturday/Sunday, respectively.
  2. The claim must include a detailed cost comparison of additional meals, lodging and other expenses versus the saving on air fare. The air fare rate used in the comparison must come from the same travel agent as where the cost saving ticket was purchased.
  3. Total reimbursement for meals and lodging and the cost of the airplane ticket shall not exceed the amount of reimbursement that would have been allowed for travel under the normal 24-hour rule plus the related air fare cost available at that time.
- D. *Special 72-Hour Extended Travel Rule.* In order for the state to further participate in the cost saving airfares offered by airline companies, state employees may be allowed to claim reimbursement of travel expenses starting up to 72 hours before and/or extending 72 hours after the date of the object of travel, provided:
1. Travel is in conjunction with a 3 or 4 day holiday weekend.
  2. The first/last day of the travel objective is immediately preceding and/or following the weekend day/holiday of travel.
  3. The extra day(s) of travel is a weekend day (i.e., Saturday/Sunday) or holiday immediately adjacent to the weekend, i.e., (Thursday) Friday or Monday (Tuesday).
  4. There is a demonstrated cost savings to the state. Presentation of travel expense claims under the special 72-hour travel rule shall be similar in procedures as the current 48-hour extended rule above. This policy procedure allows for officials and employees on business travel for the state to take advantage of less expensive air fares available for weekend departures or arrivals, particularly Saturdays. To support approval of travel under the 48/72-hour extended rule as the most economical in terms of costs, a comparison of meals, lodging and transportation expenses versus travel costs under the 24-hour provision is required. Travel under the 48/72-hour extended rule shall not be allowed if the costs of extra lodging and meals along with the discounted air fare exceed the costs of travel under the standard 24-hour rule as shown in the cost comparison of the two. In addition, the 48/72-hour extended rule shall not apply where travel is by privately-owned automobile in lieu of coach class airfare, regardless of any direct savings that may

OSU INSTITUTE OF TECHNOLOGY  
POLICY & PROCEDURES

be demonstrated.

- 1.05 Expenses for official university travel are limited by university and state policies and are handled on a cost reimbursable basis. The traveler does not receive a monetary travel advance prior to the trip, but files for reimbursement of allowable costs at the completion of the travel.
- 1.06 Use of a campus Motor Pool vehicle is the default mode of transportation for in-state travel.
- 1.07 International Travel: for the purpose of this policy, International Travel is defined as travel to any destination outside the 48 contiguous states. Alaska and Hawaii are included as international destinations since there are additional permissions required for such trips.
- 1.08 The traveler is responsible to minimize costs as a prudent steward of the university's resources.
- 1.09 OSUIT Purchasing is the only designated authority to purchase airfare, baggage fees, lodging, parking, rental cars, ground transportation and other miscellaneous travel expenses with P-Card. Any exceptions to this policy must be granted in writing by the VPFS or the Director of Purchasing.

PROCEDURES

- 2.01 Before the traveler enters official travel status, the Off-Campus Trip Request form should be completed and approved in the OSUIT online request site. Requests for in-state travel must be submitted a minimum of three working days prior to the start of the trip, requests for out-of-state travel a minimum of five working days (preferably fourteen days) prior to the start of the trip, and requests for international travel a minimum of thirty days prior to start of trip to allow sufficient time for approvals and travel arrangements. Any trip request submitted inside these time frames may be an out-of-pocket expense booked by traveler and subject to reimbursement as outlined in this policy.
- 2.02 For out-of-state travel, an additional request will be entered into the AIRS system by Purchasing and will require approval from the traveler, the immediate supervisor, other unit leaders (if required), and the VPFS. Airline ticket purchases must be approved by the Fiscal Services Office. It is preferred that the ticket is purchased by Purchasing. The university P-Card cannot be used by the employee to purchase the airline ticket.
- 2.03 Prior to any student travel, a campus activity request, student travel form, employee acknowledgement, and trip insurance form must be submitted and approved by the department and Fiscal Services. Advisor travel will follow normal travel procedures and policy. Student travel bookings will be made by Purchasing as needed.
- 2.04 Reimbursement for travel expenses is limited by university and state policies. The individual traveler completes the travel worksheet and submits to Purchasing for processing. The traveler is responsible for providing the proper information and supporting documentation (receipts).

OSU INSTITUTE OF TECHNOLOGY  
POLICY & PROCEDURES

Reimbursement for out-of-state transportation costs is limited to the lowest coach class airfare quote obtained from current contract holder. Reimbursement of actual costs shall not exceed quote amount.

The employee's duty station and normal commuting miles to their official duty station must be shown on the Travel Worksheet. Mileage reimbursement is limited to miles traveled for approved business, less any applicable commuting miles. Toll reimbursement will be limited to the current Pike Pass rate.

When employees travel to/from the airport for approved university business, mileage reimbursement may only be requested when that distance is greater than their commuting distance to their regular duty station unless travel is on a weekend or holiday.

When meals are provided through the cost of registration or otherwise through the travel arrangements, the per diem is reduced by one-quarter for each meal provided. With agency approval, the reduction may not apply if the employee cannot partake in the provided meal due to one of the following reasons, is documented in writing, and accompanies the Travel Worksheet:

- A. Medical diet restrictions such as a doctor's order or food allergy. Voluntary weight loss programs are not considered a diet restriction for this purpose.
- B. Religious restriction such as forbidden foods or fasting
- C. Ethical dietary restrictions (for example, vegan)
- D. Lack of means of transportation
- E. Conflicting meetings

Requests for reimbursement must be submitted in a timely manner (preferably within one week after travel). Reimbursements depending on grant funding will not be honored if the grant has closed. Requests submitted more than 90 days after the date of travel must be approved by the VPFS on a funds availability basis. All travel completed by May 31<sup>st</sup> must be submitted for reimbursement no later than June 15<sup>th</sup> of the same fiscal year.

2.05 Current lodging and per diem rates are available at [www.gsa.gov](http://www.gsa.gov) or through Purchasing. The traveler must submit all required documentation:

- A. Original receipts such as lodging, rental car, parking, tolls, airfare, fuel, train, shuttle, baggage and taxi,
- B. Any business related expenditures to be reimbursed,
- C. Agenda or schedule of events showing beginning and end of business purpose, and/or
- D. Designated lodging information if traveler is seeking reimbursement greater than the

OSU INSTITUTE OF TECHNOLOGY  
POLICY & PROCEDURES

allowable federal government rate ([www.gsa.gov](http://www.gsa.gov)).

- 2.06 Lodging is purchased by the Purchasing Office. The university may purchase lodging for any state officer, employee or others, while in official travel status. When required by the lodging establishment, the traveler's lodging stay may be posted to the Pcard in advance, provided the lodging is refundable upon cancelation. Documentation of the lodging establishment's cancelation policy shall be attached to the lodging receipt. Traveler will be held responsible for neglecting to properly cancel the lodging in time to receive the refund, unless justifiable cause is documented and approved by the VPFS. Resultant Pcard charges must be reimbursed to the University. The amount paid for lodging cannot exceed the single occupancy room rate charged by the designated lodging place. If a designated lodging rate is established, but rooms are not available in the designated hotel, the lodging rate shall not exceed the designated rate.

When making lodging accommodations, female students must be housed with female students and male students with male students. Student organization advisors and /or other employees must never be housed with students.

- 2.07 Students participating in university travel outside Okmulgee city limits, must be accompanied by at least one OSUIT employee or agent acting as the event sponsor/advisor. The event sponsor(s) is the party responsible for the trip.

- 2.08 Lodging includes only room rate and taxes where applicable. Lodging incidentals and other travel expenses and associated authorization holds are the responsibility of the traveler. A separate receipt should be obtained for these charges for claiming travel reimbursement. These out-of-pocket expenses may be reimbursed per state and/or university policies. Package deals or bundles (registration and lodging combined into one fee) are the responsibility of the traveler. Payment of processing/booking fees is not permissible.

- 2.09 Travel by Motor Vehicle

A. Each driver must be 18 years of age, have a valid and approved driver's license and be rested. Employees that use OSUIT vehicles shall report revocation or suspension of driver's license to their supervisor, Human Resources and Motor Pool immediately. Employees with revoked/suspended licenses found in operation of OSUIT vehicles may be terminated.

B. Each driver must be insurable.

C. Driver Minimum Age Requirements:

1. Auto/minivan/pickup – 18 years old
2. 12-15 passenger vans – 21 years old and must obtain a certification in Precision Driving from an approved facility in the type of vehicle they will be driving.

D. Occupants of motor vehicles should use seat belts or other approved safety restraint devices required by law or regulation at all times when the vehicle is in operation.

OSU INSTITUTE OF TECHNOLOGY  
POLICY & PROCEDURES

- E. The total number of passengers may not exceed the number of seatbelts available.
- F. The maximum number of hours each driver may drive is ten hours (including fuel and rest stops) following at least eight consecutive hours of sleep/rest.
- G. Optional insurance coverage for rented autos used out of state must be purchased. Coverage does not include insurance for personal effects. See section 2.13 of this policy for detail.
- H. Cell phones and electronic devices shall not be used while operating a motor vehicle for the university. Oklahoma state employees are prohibited from text messaging when driving government vehicles, driving private vehicles on government business or operating heavy equipment or machinery supplied by the state. The directive defines “texting” or “text messaging” as reading from or entering data into any handheld or other electronic device. (<https://www.sos.ok.gov/documents/executive/712.pdf>)
- I. Reimbursement for use of privately owned vehicle will be the lesser of the:
  - 1. cost of applicable roundtrip airline ticket,
  - 2. cost to use motor pool vehicle, or
  - 3. actual mileage rate multiplied by distance traveled, as documented by mapped mileage, less any applicable commute miles.
- J. OSUIT vehicles are tobacco free. Tobacco use is prohibited.
- K. Drivers shall not drive impaired as defined by the laws of the State of Oklahoma and shall not use alcohol eight hours prior to or during operation of motor vehicles.
- L. Physical damage to a privately-owned vehicle would be the responsibility of the owner or owner’s insurance; but, if an employee is using his/her own vehicle for official university business, and is acting within the scope of his/her employment, the Oklahoma Governmental Tort Claims Act would provide primary coverage for liability purposes (i.e., the damaged second party only). A motor vehicle incident report must be submitted to Fiscal Services in a timely manner to initiate review by OSU Risk Management for determination of university liability and/or loss coverage.
- M. See *3-021 Motor Pool Services* policy for a complete guide to using a motor pool vehicle.
- N. See *3-029 Vehicle Liability Insurance* policy for procedures to use if an accident occurs while using a motor pool vehicle. These procedures would include completing the accident information form, found in the dash storage compartment of the vehicle.
- O. Employees should strive to protect the university’s image when selecting parking and destination points to avoid locations of/near illegal parking, liquor stores, dispensaries, and other locations that might damage or otherwise harm university reputation by association.

OSU INSTITUTE OF TECHNOLOGY  
POLICY & PROCEDURES

- P. All students traveling on field trips must be in university or commercial vehicles. Students will not be allowed to drive personal vehicles on student field trips. Exceptions to this policy must be approved by the VPFS.
1. OSUIT assumes no liability for a student choosing to ride in a private vehicle to/from any off-campus destination.
  2. Trip insurance must be purchased for students even when they are traveling in a private vehicle
  3. The university does not provide insurance coverage for students operating a privately owned vehicle. The trip insurance required for student travel does not include insurance on vehicles. The owner/driver will be responsible.

2.10 Travel by Commercial Motor Vehicle

- A. Each driver must hold a valid and approved commercial driver's license specific to the class of vehicle under operation.
- B. All applicable requirements of the FMCSA Regulations Parts 392 and 395 for passenger-carrying vehicles must be met.
- C. Each driver must be insurable.
- D. Occupants of commercial motor vehicles should use seat belts or other approved safety restraint devices to the extent required by law or regulation at all times when the vehicle is in operations.
- E. Drivers shall not drive impaired as defined by the laws of the State of Oklahoma.

2.11 The Board of Regents for the Oklahoma Agricultural & Mechanical Colleges must be informed a minimum of 30 days in advance of all official international travel. Contact the Purchasing Office.

2.12 Travel by Air Carriers by university employees or others on official university business should be arranged through the Purchasing Office. Reimbursement may be limited for travelers who book their own air travel.

2.13 Rental cars can be reserved for out-of-state travel by Purchasing. Reservations will be made using the current contract holder and will include the necessary insurance coverage of Collision Damage Waiver (CDW) and Loss Damage Waiver (LDW). No additional options shall be added to the reservation by the traveler. Any changes made to the rental agreement will be billed back to the traveler.

2.14 Violations of this policy may result in disciplinary action or termination.

OSU INSTITUTE OF TECHNOLOGY  
POLICY & PROCEDURES

Revised: April 2016  
Revised: November 2020