

## UCAR/CPAESS Travel Procedures

UCAR policy requires that a Travel Request be created and authorized for all work-related travel before the trip begins. Please keep in mind that trips that are not authorized through CPAESS and the UCAR Travel Office cannot be reimbursed, nor is the traveler covered under UCAR's travel insurance policy.

As soon as you know you are going to travel for business purposes, please complete a [CPAESS Employee Online Travel Request](#) form. You may also find this through the CPAESS website at [www.cpaess.ucar.edu](http://www.cpaess.ucar.edu), under the "For Staff" tab. Your information will be emailed to the CPAESS Travel Coordinator team who will contact you within two days. Please send an email if you do not receive a response within this timeframe. Once the request form is received, a Travel Coordinator will begin to work with you on your travel plans and arrangements. Keep in mind that the process and approvals for foreign travel take longer.

Your CPAESS Travel Coordinator will assist you with your arrangements and will work with you to obtain the appropriate signatures/approvals required by your sponsoring agency. Please note that in some cases airline tickets cannot be purchased by you or UCAR until the Travel Request is complete and your host/supervisor's approval has been obtained. Once the Travel Request has been approved by UCAR you may commence with the trip unless otherwise notified.

Once you have returned from your trip, please email scanned copies of all itemized receipts to your CPAESS Travel Coordinator, upload your receipts directly to Concur, or use the [Expenselt](#) app to upload your receipts. If you upload your receipts directly to Concur or use the Expenselt app to upload your receipts, please send an email to your travel coordinator to let them know when all receipts are ready for processing. Your Expense Report will then be completed using your input, receipts and standard travel reimbursement rates.

You will be notified by your CPAESS Travel Coordinator once your Expense Report is ready for you to review and approve within the Concur system. To view a summary of the charges for your trip, click on the Print/Email tab, and view the \*UCAR-Detailed Report with Summary Data. Any discrepancies or questions regarding your expense report should be brought to your Travel Coordinator's attention at this time. If you approve of the details listed within your Expense Report, please select the 'Submit Report' button and follow the prompts. Please note that Expense Reports need to be completed and filed within 2 weeks of trip's end date.

### Types of Travel as Defined by UCAR

1. **Domestic Travel** – originating in the 50 US states and its possessions to anywhere within the US and its possessions.
2. **Foreign Travel** – originating in the US to a location other than the US and its possessions and all travel originating in a location outside the US and its possessions. Mexico and Canada are considered international travel destinations. See more information below regarding foreign travel
3. **Local Travel** – there is no overnight lodging and distance is less than 150 miles from your regular work location.

## **DOMESTIC TRAVEL INFORMATION:**

### **Domestic Airline Tickets**

CPAESS can purchase domestic airline tickets for employees which are direct-billed to UCAR. In order for us to request an itinerary for your approval, your full name, date of birth, citizenship, passport, and gender information must be up-to-date within your Concur profile and must be listed exactly as it appears on the type of identification you will use for TSA check-in at the airport.

Alternatively, you may purchase your own domestic airline tickets and request reimbursement upon completion of your trip. Please indicate if you plan to purchase your own tickets in the Comment section of the CPAESS Travel Request Form. If any part of your trip is personal, please read the section titled "Combining Work and Personal Travel" before making the purchase. **Please note that reimbursement for the airline ticket cannot be made until your trip has been completed and your expense report has been submitted and approved by the UCAR Travel Department.**

### **Domestic Per Diem**

Domestic per diem is paid at the rate of the city of lodging (not where you are conducting business) based on the standard US government rate. 75% of that rate is paid for the day of departure and the day of return travel. Per diem is meant to cover meals and incidentals which includes \*tips\* for taxis, shuttles, etc. Per diem will be deducted for meals provided at meetings, workshops or conferences.

## **INTERNATIONAL TRAVEL INFORMATION:**

Foreign travel is complicated and the ticketing and approval processes can be lengthier than domestic travel. Please do not wait until the last minute to submit your request. CPAESS's policy is that all airline tickets for foreign travel **must be** purchased through CAIN, UCAR's contracted travel agency. If you purchase your own foreign airfare, you may not be reimbursed by UCAR.

### **International Travel to a 'Listed' Country**

Travel to a foreign nation or state that could expose UCAR staff and/or property to unusually hazardous conditions, as determined by UCAR's Director of Health, Environment and Safety Services (HESS), is listed on the HESS website, <https://operations.ucar.edu/fms/hess/listed-areas>

Travel to a 'listed' country requires special review of possible travel issues and certification by the traveler that those issues are understood. There is a UCAR process for these situations and no travel authorization approval will be granted until this process is complete. Please inform your CPAESS Travel Coordinator if you need to travel to a listed country, and they will assist you with this process.

### **International Airline Tickets**

All foreign travel for UCAR employees must be compliant with the Fly America Act as our programs are funded by US government agencies. CPAESS's policy is that all airline tickets for foreign travel must be purchased through CAIN, UCAR's contracted travel agency. This assures that the tickets comply with all Federal regulations. Keep in mind that these tickets may be more costly than what you would purchase yourself on a foreign carrier.

If you are combining personal foreign travel with a domestic business trip and any of the ticket is purchased on a foreign carrier, none of the ticket can be reimbursed. Please contact CPAESS with any questions regarding any type of foreign travel as there are no exceptions to policy for incorrectly purchased tickets.

### **International Per Diem**

UCAR pays 75% of the standard per diem for the day of departure and the day of return travel. Other days are paid at the rate of the city of lodging according to the US government guidelines. Per diem should be deducted for meals provided at meetings, workshops or conferences.

### **Domestic and International Lodging**

You are responsible for making your own lodging arrangements for both domestic and foreign travel. When your Concur Travel Request is sent to you for approval it will contain an estimated lodging amount based upon the rate you provide on the CPAESS Travel Request Form or the US Government rate for the city and dates of your travel. Sometimes lodging will cost more than estimated for various reasons. UCAR will reimburse reasonable lodging costs.

Please be sure to get a lodging receipt showing the name and address of the hotel, date of check-in and check-out and all itemized charges. It is best if you can also get a \$0 balance receipt showing that the bill was paid. The UCAR Travel Office requires the itemized lodging bill to determine what costs are reimbursable. UCAR will not pay for room service, mini-bar purchases or alcohol or any entertainment. Business internet costs are allowable and are reimbursed as miscellaneous costs separate from the lodging total.

### **Rental Cars**

UCAR has contracts with most major auto rental companies, and rental cars should be acquired through CPAESS. Your CPAESS Travel Coordinator will make the reservation and the cost will be direct-billed to UCAR. There are many regulations regarding insurance on rental cars that are not reserved through UCAR's standard contracts so if you choose to rent your own car please familiarize yourself with the policies and procedures, as you may be putting yourself at risk in case of accident or damage.

Please note that additional insurance on a rental car **is not** an allowable cost. In the event that additional insurance is applied to the reservation by the traveler, the cost will be billed to the traveler. This applies to both direct billed rentals and those rented personally by the traveler.

When returning the car, be sure to obtain a receipt as UCAR must review the charges to see no additional services

or insurances have been charged. If you use your rental car during personal time, those personal day costs will be deducted from any reimbursement due.

### **Using a Personal Automobile for Official Business**

When private autos are used for business trips to destinations less than 150 miles from the traveler's regular work location and no overnight stay is required, mileage is reimbursed but no per diem is paid.

When using a personal vehicle on UCAR business, the traveler's personal auto insurance is the primary coverage for third-party liability claims. UCAR's insurance is in excess of that coverage and covers both the traveler and UCAR. If an accident occurs while the personal vehicle is being used for business travel, the traveler must submit a claim to his or her own auto insurance carrier and to the UCAR Insurance Office. Any deductible on the traveler's comprehensive and collision coverage is the traveler's responsibility and will not be reimbursed by UCAR. UCAR is not responsible for comprehensive or collision damage to the traveler's personal vehicle. The mileage rate for reimbursement assumes the traveler provides his or her own automobile insurance coverage.

For a trip that is not considered local, a loss of time resulting from the choice of a slower means of transportation, such as car or train, when faster commercial air transportation is available, should be minimized. If a slower means of transportation is chosen for the personal convenience of the traveler, an equivalent airfare quote from a third party such as a travel agent (CPAESS will provide this) must be obtained prior to the trip taking place.

Reimbursement is made on the basis of applicable mileage plus the per diem allowance and lodging, or the airfare plus applicable per diem allowance, whichever is less, as documented by the traveler. Costs incurred above this limit are borne by the traveler. If a slower means of transportation is selected for the personal convenience of the traveler, the excess time, beyond that which would be incurred using air travel is charged as Paid Time Off or leave without pay. If a slower means of transportation is selected for the medical necessity of the traveler, all reasonable costs are reimbursed once an exception to the policy has been approved by the appropriate President's Council member.

### **Combining Work and Personal Travel**

If you are combining work and personal travel, UCAR has a no-loss, no-gain policy. Your airfare will be limited to the round trip coach airfare that UCAR can obtain for your work-related days of travel. We will obtain two airfare quotes 1) for traveling on the work-related dates and 2) for the dates you requested including your personal travel time. If the fare for your actual trip is more expensive than the fare for traveling on work-related dates, you will be responsible for the additional costs. These costs will be deducted from your Expense Report. Your CPAESS Travel Coordinator will advise you of any difference between your work vs. work and personal costs before purchasing a ticket. Your actual airfare receipt must be presented for reimbursement. All expenses incurred while you are on personal time will not be reimbursed. These include, but are not limited to, lodging, per diem, rental car use, ground transportation, etc.

### **UCAR Employee Travel Credit Card (T-card)**

All UCAR employee travelers are eligible for the corporate billed JP Morgan Visa UCAR Travel Credit Card (T-Card). With this credit card, you can directly charge to UCAR all your business travel expenses allowable under UCAR policy. These cards significantly reduce the need for cash advances and reimbursements, dramatically streamline administrative overhead, and have no impact on your individual credit rating. These cards also help eliminate out of pocket expenses and integrate seamlessly with expense reporting in Concur.

If you are interested in applying for a T-Card, please contact your Program Administrator for further details on this process.

If you have a T-Card, please complete the CPAESS Travel Request Form prior to using your T-card for expenses. The UCAR T-card is meant to eliminate the need for most travel advances, but please let your Travel Coordinator know if a travel advance is still needed. Please use your UCAR T-card for expenses incurred prior to your departure such as registration fees, lodging deposits/reservations. Your T-card can be used for travel related expenses incurred during your trip such as baggage fees, ground transportation, lodging costs, internet fees, parking, and gas for your rental car.

Please keep in mind that If you pay for items with your own personal credit card, you will have to hold them until the trip is complete to receive your reimbursement. This includes registration fees, posters, hotel deposits, etc. The system does not allow us to reimburse you prior to your trip.

WHAT WE SUGGEST is getting a UCAR Travel Card (T-CARD) so that you incur fewer out-of-pocket expenses and are not awaiting reimbursement for those amounts. In addition, all of the expenses paid for with the T-CARD will integrate with the Expense Report within Concur and will help to streamline the Expense Report process.

1. Please don't use the T-card to pay for food when you travel. If you believe you may need assistance with meal costs, please let your travel arranger know, and we can set up a travel advance.

2. Should you register for a meeting online and your card is rejected, please contact Diana Zinzli at [dzinsli@ucar.edu](mailto:dzinsli@ucar.edu) or 303-497-1128 and she can remove the restricted merchant code so that you may then use it for that specific event. AGU and AMS should not be an issue but other meetings or conferences may be.

### **Travel Advances**

Travel advances can be issued to travelers who anticipate up-front out-of-pocket costs for a trip that they do not want to personally incur. If you wish to receive an advance amount for your travel please indicate the amount on the CPAESS Travel Request Form. Please keep in mind that travel advances cannot exceed the anticipated total trip costs and are paid to the employee no earlier than 10 days in advance of the trip.

You can further familiarize yourself with UCAR's travel policies and procedures at:

<https://operations.ucar.edu/policies/5-7-travel-concur>.