

# MARCH 2018 CHANGES TO TRAVEL REQUIREMENTS FOR UNIVERSITY EMPLOYEES

New Text	Old Text
<p><b>2.1 Subsistence Allowance Rates</b></p> <p>Subsistence is an allowance for lodging and meal costs (including gratuities). To be eligible for allowances while in travel status, the employee must be acting in an official capacity as required by his/her work activities and the travel destination must be at least 35 miles from the employee's duty station or home, whichever is less. <b>Travel reimbursement calculations must involve the starting address of the employee's regularly assigned duty station or home, whichever is less, to the final travel destination.</b></p>	<p><b>2.1 Subsistence Allowance Rates</b></p> <p>Subsistence is an allowance for lodging and meal costs (including gratuities). To be eligible for allowances while in travel status, the employee must be acting in an official capacity as required by his/her work activities and the travel destination must be at least 35 miles from the employee's duty station or home, whichever is less.</p>
<p><b>2.2.1 Meal Allowances When in Travel Status but Not Traveling Overnight</b></p> <p>Text Deleted</p>	<p><b>2.2.1 Meal Allowances When in Travel Status but Not Traveling Overnight</b></p> <p>Employees are eligible for the breakfast and evening meal allowances when approved in advance of the expense by the department head or designee and the following applies:</p> <ol style="list-style-type: none"> <li>1. Breakfast (morning) - depart duty station prior to 6:00 A.M. and extend the workday 2 hours.</li> <li>2. Dinner (evening) - Return to duty station after 8:00 P.M. and extend the workday 3 hours.</li> <li>3. Lunches are not reimbursable from state funds if travel does not involve an overnight stay.</li> <li>4. Meal allowances are not allowed from state, federal or F&amp;A funds for travel related to internal conferences unless overnight travel criteria are met.</li> </ol>
<p><b>2.2.2 Meal Allowances When Traveling Overnight</b></p> <p>University employees when in overnight travel status are eligible to receive reimbursement for meals (including lunches) for full days of travel and for partial days (less than 24 hour period) when the partial day is the day of departure or the day of return and the partial day involves an overnight stay. The following applies to be eligible for meals on partial travel days:</p> <ol style="list-style-type: none"> <li>1. Breakfast - Depart duty station prior to 6:00 A.M.</li> <li>2. Lunch - Depart duty station prior to Noon (day of departure) or return to duty station after 2:00 P.M. (day of return).</li> </ol>	<p><b>2.2.2 Meal Allowances When Traveling Overnight</b></p> <p>University employees when in overnight travel status are eligible to receive reimbursement for meals (including lunches) for full days of travel and for partial days (less than 24 hour period) when the partial day is the day of departure or the day of return and the partial day involves an overnight stay. The following applies to be eligible for meals on partial travel days:</p> <ol style="list-style-type: none"> <li>1. Breakfast - Depart duty station prior to 6:00 A.M. <b>and extend the workday by 2 hours.</b></li> <li>2. Lunch -Depart duty station prior to Noon (day of departure) or return to duty station after 2:00 P.M. (day of return).</li> </ol>

# MARCH 2018 CHANGES TO TRAVEL REQUIREMENTS FOR UNIVERSITY EMPLOYEES

<p>3. Dinner - Depart duty station prior to 5:00 P.M. (day of departure) or return to duty station after 8:00 P.M. (day of return).</p>	<p>3. Dinner - Depart duty station prior to 5:00 P.M. (day of departure) or return to duty station after 8:00 P.M. (day of return) <b>and extend the workday by 3 hours.</b></p>
<p><b>2.2.3 Determining Reimbursement for Travel Meals</b></p> <p>Each employee is responsible for his or her own request for travel reimbursement. The subsistence rate for meals is inclusive of gratuities. Meal reimbursements are subject to the number of meals allowed for the travel period reduced by any meals that are included in other reimbursable expenses such as meals included in conference fees. The employee may receive the meal subsistence rate regardless of the actual amount incurred for meals.</p> <p>Meal reimbursements are calculated by the Travel Center based on the subsistence allowances shown in 2.1 above <i>"Subsistence Allowance Rates"</i>. Times of departure and arrival must be recorded on the travel reimbursement to calculate the meal reimbursement. The costs of meals included in other related activities (registration fees, conference costs, hotel registration, <b>airfare</b>, etc.) that are predetermined and not optional, may not be duplicated in the reimbursement request.</p>	<p><b>2.2.3 Determining Reimbursement for Travel Meals</b></p> <p>Each employee is responsible for his or her own request for travel reimbursement. The subsistence rate for meals is inclusive of gratuities. Meal reimbursements are subject to the number of meals allowed for the travel period reduced by any meals that are included in other reimbursable expenses such as meals included in conference fees. The employee may receive the meal subsistence rate regardless of the actual amount incurred for meals.</p> <p>Meal reimbursements are calculated by the Travel Center based on the subsistence allowances shown in 2.1 above <i>"Subsistence Allowance Rates"</i>. Times of departure and arrival must be recorded on the travel reimbursement to calculate the meal reimbursement. The costs of meals included in other related activities (registration fees, conference costs, hotel registration, etc.) that are predetermined and not optional, may not be duplicated in the reimbursement request.</p> <p>If claimed, an employee may be reimbursed for breakfast even if their lodging establishment offers a free continental breakfast.</p> <p><b>University employees are allowed to claim reimbursement for meals even though they are shown and offered as a part of one's flight schedule on a commercial airline.</b></p>
<p><b>2.3.1 Reimbursement for Lodging Expenses</b></p> <p>In order to qualify for reimbursement for overnight stays, the travel must involve a travel destination located at least 35 miles from the employee's duty station or home, whichever is less, <b>to the final travel destination.</b></p>	<p><b>2.3.1 Reimbursement for Lodging Expenses</b></p> <p>In order to qualify for reimbursement for overnight stays, the travel must involve a travel destination located at least 35 miles from the employee's duty station or home, whichever is less.</p>
<p><b>2.3.3 Lodging in Non-Commercial Lodging Establishments</b></p> <p>Reimbursement for lodging in an establishment that is being rented out by a third party or an establishment treated as an apartment building by state or local law or regulation is not allowed unless</p>	<p><b>2.3.3 Lodging in Non-Commercial Lodging Establishments</b></p> <p>Reimbursement for lodging in an establishment that is being rented out by a third party or an establishment treated as an apartment building by state or local law or regulation is not allowed unless approved in advance by</p>

# MARCH 2018 CHANGES TO TRAVEL REQUIREMENTS FOR UNIVERSITY EMPLOYEES

<p>approved in advance by the University Controller’s Office, as delegated by the Office of State Budget and Management (OSBM). Requests for third party lodging must provide evidence of savings to the state. An exception may be granted for requests that do not show savings with sufficient justification to support the necessity for third party lodging.</p> <p>If an employee desires to stay in an establishment other than a commercial lodging establishment, while in travel status, the employee / travel coordinator should obtain prior approval from his/her department head and then contact the University Controller’s Office to obtain the required prior approval. In each case where third party lodging is being considered, the traveler/ travel coordinator (applicant) must provide the University Controller’s Office with all details regarding the arrangement, including the amount to be charged, the length of stay, <b>projected cost savings compared to standard lodging rates</b>, and contact information. If approved by the University Controller’s Office, a signed rental agreement <b>or a reservation receipt</b> must be presented to receive reimbursement.</p>	<p>the University Controller’s Office, as delegated by the Office of State Budget and Management (OSBM). Requests for third party lodging must provide evidence of savings to the state. An exception may be granted for requests that do not show savings with sufficient justification to support the necessity for third party lodging.</p> <p>If an employee desires to stay in an establishment other than a commercial lodging establishment, while in travel status, the employee / travel coordinator should obtain prior approval from his/her department head and then contact the University Controller’s Office to obtain the required prior approval. In each case where third party lodging is being considered, the traveler/ travel coordinator (applicant) must provide the University Controller’s Office with all details regarding the arrangement, including the amount to be charged, the length of stay, and contact information. If approved by the University Controller’s Office, a signed rental agreement must be presented to receive reimbursement.</p>
<p><b>5.1.20 Transportation by Common Carrier</b></p> <p>Reimbursement for air, rail, or bus fare is limited to actual coach fare, substantiated by receipt. Reimbursement for fees for check-in, <b>seat assignments, and baggage</b> is limited to actual costs substantiated by receipt.</p>	<p><b>5.1.20 Transportation by Common Carrier</b></p> <p>Reimbursement for air, rail, or bus fare is limited to actual coach fare, substantiated by receipt. Reimbursement for check-in fees is limited to actual costs substantiated by receipt.</p>
<p><b>5.1.23 Frequent Flyer Miles</b></p> <p>Text Deleted/ Policy No Longer Applicable</p>	<p><b>5.1.23 Frequent Flyer Miles</b></p> <p>Frequent flyer miles earned by a state employee while traveling on state business at state expense are the property of the State. Frequent flyer miles accumulated by an individual state employee during previous state business trips should, to the extent possible, be used by the State employee accumulating the frequent flyer miles while traveling on future state business trips.</p>

# MARCH 2018 CHANGES TO TRAVEL REQUIREMENTS FOR UNIVERSITY EMPLOYEES

<p><b>3.1.2 Travel to/from Airport at Employee's Duty Station</b></p> <p>Reimbursement for travel between the employee's duty station or home (whichever is less) and the nearest airline terminal (or train/bus station if applicable) and for appropriate parking may be made under the following circumstances.</p> <ol style="list-style-type: none"> <li>1. Taxi, <b>car service, mobile phone ordered car service</b>, or Airport Shuttle - Actual costs with original receipts.</li> <li>2. Private car - The business standard mileage rate set by the Internal Revenue Service for a maximum of two round trips with no parking charge, or for one round trip with parking charges. For employees working at the main campus, the maximum mileage for one round trip is 30 miles and for two is 60 miles. Original receipts are required for airport parking claims.</li> <li>3. Use of Public Transportation - In lieu of using a taxi or airport shuttle, employees can be reimbursed without original receipts \$5 for each one-way trip either from or to the airport and the duty station or home (whichever is less). Original receipt required if cost is greater than \$5.00.</li> </ol>	<p><b>3.1.2 Travel to/from Airport at Employee's Duty Station</b></p> <p>Reimbursement for travel between the employee's duty station or home (whichever is less) and the nearest airline terminal (or train/bus station if applicable) and for appropriate parking may be made under the following circumstances.</p> <ol style="list-style-type: none"> <li>1. Taxi or Airport Shuttle - Actual costs with original receipts.</li> <li>2. Private car - The business standard mileage rate set by the Internal Revenue Service for a maximum of two round trips with no parking charge, or for one round trip with parking charges. For employees working at the main campus, the maximum mileage for one round trip is 30 miles and for two is 60 miles. Original receipts are required for airport parking claims.</li> <li>3. Use of Public Transportation - In lieu of using a taxi or airport shuttle, employees can be reimbursed without original receipts \$5 for each one-way trip either from or to the airport and the duty station or home (whichever is less). Original receipt required if cost is greater than \$5.00.</li> </ol>
<p><b>3.1.3 Travel to/from Airport at Employee's Destination</b></p> <p>Reimbursement for travel to and from the airline terminal (or train/bus station if applicable) at the employee's destination may be made where travel is via the most economical mode available as listed below:</p> <ol style="list-style-type: none"> <li>1. Taxi, <b>car service, mobile phone ordered car service</b>, or Airport Shuttle service - Actual costs with original receipts</li> <li>2. Rental Vehicles - may be used with the prior approval of department head or his or her designee. Original receipt is required. Insurance on rental vehicle is not reimbursable from University funds when travel is in-state or out-of-state.</li> <li>3. Use of Public Transportation - In lieu of using a taxi or airport shuttle, employees can be reimbursed without receipts \$5 for each one-way trip either from the airport to hotel/meeting or from the hotel meeting to the airport. Original receipt required if cost is greater than \$5.00.</li> </ol>	<p><b>3.1.3 Travel to/from Airport at Employee's Destination</b></p> <p>Reimbursement for travel to and from the airline terminal (or train/bus station if applicable) at the employee's destination may be made where travel is via the most economical mode available as listed below:</p> <ol style="list-style-type: none"> <li>1. Taxi or Airport Shuttle service - Actual costs with original receipts</li> <li>2. Rental Vehicles - may be used with the prior approval of department head or his or her designee; however, rental vehicles may not be used for the sole convenience or personal preference of the employee. Original receipt is required. Insurance on rental vehicle is not reimbursable from University funds when travel is in-state or out-of-state.</li> <li>3. Use of Public Transportation - In lieu of using a taxi or airport shuttle, employees can be reimbursed without receipts \$5 for each one-way trip either from the airport to hotel/meeting or from the hotel meeting to the airport. Original receipt required if cost is greater than \$5.00.</li> </ol>

# MARCH 2018 CHANGES TO TRAVEL REQUIREMENTS FOR UNIVERSITY EMPLOYEES

<p><b>3.3 Transportation by Aircraft Owned by a State Employee/Privatey Owned Aircraft</b></p> <p>Text Deleted/ Policy No Longer Applicable</p>	<p><b>3.3 Transportation by Aircraft Owned by a State Employee/Privatey Owned Aircraft</b></p> <p>Reimbursement for costs incurred in the use of aircraft, owned by a state employee, on official state business may be approved by the department head or his/her designee, provided the following is substantiated and put in writing:</p> <ol style="list-style-type: none"> <li>1. The use of the aircraft owned by a state employee is necessary because of unusual travel circumstances and is not for the sole convenience of the employee who owns the plane.</li> <li>2. The use of the aircraft, owned by a state employee, at the rates published below is cheaper than any other method of air travel.</li> </ol> <p>The allowable reimbursement rate for aircraft owned by a state employee is \$.68 per mile per passenger.</p>
<p><b>4.1 Transportation by Passenger Vehicle</b></p> <p>University travel shall be conducted in the most efficient manner and at the lowest and most reasonable cost to the university. With regard to passenger vehicle travel, whether in-state or out-of-state, university departments shall:</p> <ul style="list-style-type: none"> <li>• Maximize the utilization of university-owned vehicles,</li> <li>• Make use of State term contracts for short-term rentals (<a href="#">State Term Contract 975B Vehicle Rental Service</a>), and</li> <li>• Reimburse for use of personal vehicles on a limited basis in situations when the use of state owned vehicles or state term contract rental vehicles are not readily available</li> </ul>	<p><b>4.1 Transportation by Passenger Vehicle</b></p> <p>University travel shall be conducted in the most efficient manner and at the lowest and most reasonable cost to the university. With regard to passenger vehicle travel, whether in-state or out-of-state, university departments shall:</p> <ul style="list-style-type: none"> <li>• Maximize the utilization of university-owned vehicles,</li> <li>• Make use of State term contracts for short-term rentals (State Term Contract 975B Vehicle Rental Service), and</li> <li>• Reimburse for use of personal vehicles on a limited basis.</li> </ul>
<p><b>4.3 Rental Vehicles</b></p> <p>Rental vehicles may be used with the prior approval of the department head or his/her designee. Rental vehicles are not authorized for personal use.</p>	<p><b>4.3 Rental Vehicles</b></p> <p>Rental vehicles may be used with the prior approval of the department head or his/her designee.</p>
<p><b>5.3 Use of State Vehicles at Employee's Destination</b></p> <p>At the employee's destination, state cars may be used prudently for travel to obtain meals and for de-minimis personal purposes. Examples of de-minimis personal travel would include stopping for lunch, picking up a prescription at a pharmacy and related errands.</p>	<p><b>5.3 Use of State Vehicles at Employee's Destination</b></p> <p>At the employee's destination, state cars may be used prudently for travel to obtain meals and other necessities, but not for private purposes or for entertainment while off duty. An employee may not use a state-owned vehicle for obtaining meals unless he/she is in travel status.</p>

# MARCH 2018 CHANGES TO TRAVEL REQUIREMENTS FOR UNIVERSITY EMPLOYEES

<p><b>6.3.2 IRS Business Standard Rate</b></p> <p>An employee may be reimbursed at the IRS business standard rate of 54.5 cents a mile on and after January 1, 2018 when round trip <b>business mileage</b> does not exceed 100 miles <b>per trip</b>. If the round trip mileage exceeds 100 miles <b>per trip</b>, the employee will be reimbursed 33 cents per mile <b>for all business miles</b>. <b>Personal vehicle mileage is measured from the closer of the employee’s duty station, or point of departure, to the business destination(s) and return.</b> <b>Examples of policy application to various business scenarios are below.</b></p>	<p><b>6.3.2 IRS Business Standard Rate</b></p> <p>An employee may be reimbursed at the IRS business standard rate of 53.5 cents a mile on and after January 1, 2017 when the round trip does not exceed 100 miles per day of travel. If the round trip mileage exceeds 100 miles per day of travel, the employee will be reimbursed 53.5 cents per mile for 100 miles per day with any additional miles over 100 miles per day of travel reimbursed at 17 cents per mile.</p>
<p><b>6.3.4 Mileage Policy Exceptions</b></p> <p><b>Internal department exceptions to this policy can be granted by the agency head, or designee, if a department has a unique clearly documented business need that is not directly addressed by this policy. These exceptions are public records and shall be made available upon request by OSBM staff, auditors or interested third parties.</b> <b>Exceptions to the mileage policy may be granted by the agency head, or their designee, if an agency has a clearly documented business need that is not addressed by the policy. Other mileage rate exceptions can be requested by completing the <a href="#">Mileage Policy Exception Request form</a> and submitting it to the University Controller's Office prior to traveling and/or incurring travel related expenses. Approval of the exception will be communicated to the requestor.</b></p>	<p><b>6.3.4 Mileage Policy Exceptions</b></p> <p>New for 2018. Not in previous revision</p>
<p><b>7.2.1</b> For those employees authorized by BOT Pol 05.15.3, sec 4.4.1 to receive a courtesy or leased vehicle, reimbursement is allowed for the payment of vehicle insurance, taxes and campus parking permits. In addition, the employee may be reimbursed for business mileage at <b>18</b> cents a mile on or after January 1, <b>2018</b> (the IRS variable rate component).</p>	<p><b>7.2.1</b> For those employees authorized by BOT Pol 05.15.3, sec 4.4.1 to receive a courtesy or leased vehicle, reimbursement is allowed for the payment of vehicle insurance, taxes and campus parking permits. In addition, the employee may be reimbursed for business mileage at 17 cents a mile on or after January 1, 2017 (the IRS variable rate component).</p>
<p><b>7.2.2</b> For those employees authorized by BOT Pol 05.15.3 sec 4.4.2 to receive a courtesy or leased vehicle, reimbursement is allowed only for business related travel at a mileage rate of <b>29.5</b> cents on or after January 1, <b>2018</b>.</p>	<p><b>7.2.2</b> For those employees authorized by BOT Pol 05.15.3 sec 4.4.2 to receive a courtesy or leased vehicle, reimbursement is allowed only for business related travel at a mileage rate of 28.5 cents on or after January 1, 2017.</p>

# MARCH 2018 CHANGES TO TRAVEL REQUIREMENTS FOR UNIVERSITY EMPLOYEES

<p><b>7.3 Vehicle Allowances</b></p> <p>Vehicle allowances are provided to employees, as authorized by the Board of Trustees, on a monthly basis in lieu of providing a courtesy or leased vehicle. There will be no accounting for the business versus personal use of a car associated with the allowance due to the 100% taxable nature of the payment. Vehicle allowances are fully taxable as non-salary compensation to the employee.</p> <p>Employees under a vehicle allowance arrangement may receive reimbursement for actual business mileage or other vehicle expenses as allowed under state regulations or under NC State policies and guidelines. The mileage rate for reimbursement for the business use of a vehicle when the employee has a vehicle allowance is <b>29.5</b> cents on or after January 1, <b>2018</b>. This rate includes all costs of operating a vehicle except for depreciation. The rate is based on the IRS standard business mileage rate (<b>54.5</b> cents on or after January 1, <b>2018</b>) less the amount included for depreciation (25 cents on or and after January 1, <b>2018</b>). Vehicle allowances may only be paid from exempt non-state appropriated funds.</p>	<p><b>7.3 Vehicle Allowances</b></p> <p>Vehicle allowances are provided to employees, as authorized by the Board of Trustees, on a monthly basis in lieu of providing a courtesy or leased vehicle. There will be no accounting for the business versus personal use of a car associated with the allowance due to the 100% taxable nature of the payment. Vehicle allowances are fully taxable as non-salary compensation to the employee.</p> <p>Employees under a vehicle allowance arrangement may receive reimbursement for actual business mileage or other vehicle expenses as allowed under state regulations or under NC State policies and guidelines. The mileage rate for reimbursement for the business use of a vehicle when the employee has a vehicle allowance is 28.5 cents on or after January 1, 2017. This rate includes all costs of operating a vehicle except for depreciation. The rate is based on the IRS standard business mileage rate (53.5 cents on or after January 1, 2017) less the amount included for depreciation (25 cents on or and after January 1, 2017). Vehicle allowances may only be paid from exempt non-state appropriated funds.</p>
<p><b>9.3 Telephone Calls</b></p> <p>With the 2018 travel policy changes, OSBM has provided each state agency with the authority to create their own internal reimbursement policies for communication expenses while in travel status. Policies related to the reimbursement of telephone calls, cellular service, and data service that was incurred while in travel status are currently be written. Updated information is forth coming. In the interim, the prior policies applies.</p>	<p><b>9.3.1 Long Distance Telephone Calls</b></p> <p>Employees are not allowed to charge long distance phone calls to the University for calls made of a personal nature, except as stated below. All long distance calls that are to be paid by the University are those made pursuant to the employee conducting official state business. Long distance calls made and paid by University employees pursuant to conducting official University business are reimbursable to the employee under "Other Expenses". Individual calls over five dollars (\$5.00) must be identified as to point of origin and destination.</p> <p><b>9.3.2 Telephone Access Fees</b></p> <p>Telephone access fees for business calls are considered a miscellaneous expense. Telephone access fees for personal calls are not reimbursable.</p> <p><b>9.3.3 Allowable Personal Telephone Calls</b></p> <p>An employee who is in travel status for two or more consecutive nights in a week is allowed one personal long distance telephone call for each two nights, for which reimbursement to the employee may not exceed \$3.00 for</p>

# MARCH 2018 CHANGES TO TRAVEL REQUIREMENTS FOR UNIVERSITY EMPLOYEES

	<p>each in-state call or \$5.00 for each out-of-state call. Documentation of actual telephone expense is required. Employees may also be reimbursed for a personal long distance call(s) if such call(s) is/are of an emergency nature as determined by the University department. An example may be a call made when an employee calls home to inform someone that the travel period has been extended beyond original plans due to unforeseen reasons.</p> <p><b>9.3.5 Internet Access Purchased While in Travel Status</b>          Employees traveling on official state business needing to transmit data, including e-mail, via their computers should use the most efficient manner available. Internet charges while in travel status are reimbursable if approved by the department. Original receipt is required for reimbursement.</p> <p><b>9.3.6 Employee Reimbursement of Personal Calls</b>          Use of university owned telephones (including cell phones) for personal reasons that cause additional charges to be incurred by the university are strictly prohibited. Should a University employee charge to the University a personal long distance or cell phone call not covered as described in 9.3.3, the employee should immediately notify his or her supervisor and make arrangements to reimburse the University.</p>
<p><b>9.3.4 Mobile Communication Devices (MCD)</b></p> <p>Text deleted. Review section 8 for Mobile Communication Device policy.</p>	<p><b>9.3.4 Mobile Communication Devices (MCD)</b></p> <p>See section 8 above for guidelines on the use of MCDs. MCD calls made to conduct official state business while in travel status must follow the requirements as provided for in section 8. If an employee uses a personal MCD that is not approved by the University, reimbursement for business use of the MCD is not permitted.</p>