

UNIVERSITY OF NORTH CAROLINA SCHOOL OF THE ARTS

Travel Policy

Policy #310

Source of Authority: N.C.G.S. §§ 138-5 to 138-7;
N.C.G.S. § 14-247;
State Budget Manual § 5;
N.C.G.S. § 116-34(a);
UNC Code § 502(A)

Revision Authority: Chancellor

History: **First Issued:** February 17, 2011
Revised: March 26, 2018

Related Policies: Salaries, Fees, & Allowances, N.C.G.S. §§ 138-5 to 138-7;
Private Use of a Publically Owned Vehicle, N.C.G.S. § 14-247;
State Budget Manual § 5;
Accounts Payable Policy #301;
Cash Management Policy #302;
Conflicts of Interest (Employees) Policy #603;
EPA Recruitment Policy #609;
External Activities for Pay Policy #610;
Foundation Funds Use Policy #202;
Improper Activities Reporting Policy #114;
Political Activities Policy #116;
Purchasing Policy #308;
Smoking Policy #703;
Travel & Subsistence Expenses for Applicants Policy #311
Third Party Lodging Policy #318

Responsible Offices: Financial Services Department

Effective Date: March 26, 2018

I. Purpose

The University intends to ensure fair and equitable reimbursement of University business travel expenses as well as compliance with all applicable laws and regulations related to travel.

This policy implements the State of North Carolina’s travel regulations and complies with the Internal Revenue Service requirements for an Accountable Plan. To be reimbursable, University business travel must be performed in the most economical manner consistent with mission requirements; all expenses must be incurred while in travel status; expenses must be reasonable, necessary and (except for meal per diem) actual; and expenses must not exceed the limitations imposed by the State or the University.

II. Scope

This policy and the accompanying Travel Manual apply to all UNCSA faculty, staff, students, organizations, and any other individuals and members of organizations that

travel at University expense (hereinafter “Travelers”).

III. Policy

A. Responsibilities

Travelers are responsible for performing their travel duties in conformity with the provisions of this policy and the Travel Manual and for providing expenditure documentation that is legitimate and complete to support their travel reimbursement claims. Unauthorized excess costs, including those involving circuitous routes, delays, or luxury accommodations and services unnecessary or unjustified in the performance of official business, are not reimbursable or otherwise to be paid using University funds. Travelers are responsible for unauthorized costs and any additional expenses incurred for personal preference or convenience.

Supervisors and senior approving officials are responsible for authorizing travel in advance and for reviewing and monitoring all travel expenses they approve. Such approval must certify that the travel was necessary and the expenses were authorized and incurred while on official business of the University. Supervisors also are required to deny reimbursement in situations where there is reason to believe the expenditures are inappropriate, extravagant, unjustified, or unreasonable.

The Controller is responsible for administering and overseeing the provisions of this policy and for providing guidance to travelers through the Accounts Payable and Travel Office.

B. Policy

The University will reimburse reasonable and approved business-related travel expenditures incurred by Travelers for the conduct of University business according to this policy and the accompanying Travel Manual, which applies to all departments, regardless of the source of funds, and to all affiliated and related organizations.

No duplicate claims or commuting expenses are reimbursable.

This policy applies to all grant funds, except when the sponsor’s guidelines are more restrictive than University policy, in which case the sponsor’s guidelines apply. Principal investigators and others traveling on grant funds are expected to be familiar with the allowable cost of the sponsored program. Travel expenses that do not conform to both this policy and the sponsor’s guidelines will not be reimbursed to the Traveler or expensed to the grant fund.

Each administrator is responsible for ensuring that reimbursements from programs or to persons under his or her authority are reasonable and appropriate for the purpose and charged to a program appropriate to that purpose. An administrator may set lower reimbursement amounts for persons or programs under his or her responsibility.

Reimbursement claims must be signed by the person seeking reimbursement, the immediate supervisor, and the person responsible for the fund paying the claim, if different from the supervisor. Individuals may not approve their own reimbursement or

that of a superior. It is recommended that Travelers retain photocopies of expense reports and related receipts for their own records.

Receipts showing the date of service are required for reimbursement of all expenditures except for meal per diems and incidental expenditures such as tips. Every reimbursement request must include a statement of business purpose that covers the entire travel period.

Travelers who do not comply with this policy or with the Travel Manual will either not be reimbursed or their reimbursement will be treated as taxable income.

IV. Revision History

- A. February 17, 2011 – Adopted by Board of Trustees as part of UNCSA Policy Manual
- B. March 26, 2018 – Revised to simplify the policy and link to the current Travel Manual.

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Travel Procedures
Procedure #310

I. Travel Policy Manual

- A. Financial Services will establish and maintain a Travel Policy Manual which will contain more information and procedures for implementing the Travel Policy.
- B. The Travel Policy Manual is available at on the [Financial Services](#) webpage.