Travel Policy Reminders

Recently several situations have surfaced regarding travel. Following is a clarification of MSU policy and procedures as it relates to each situation. Please put procedures in place in your departments if these travel situations are happening in your departments. (Policy is in italics), (Department procedure in Bold).

**Employee Business Travel Combined With Personal Travel**

Policy: University Business Procedures Manual: 550.10 Transportation-Mode of Travel:

*IN LIEU OF AIRFARE, an employee may wish to use other than the most economical and expeditious mode of transportation to complete a travel oriented work assignment. For example, an employee may prefer to drive a private vehicle to a particular destination rather than fly. To drive would require more travel time and more cost than airfare. When other than the least expensive class service is used, a full explanation of the justifying circumstances MUST be included with the claim. The employee will be given "air travel equivalent"--the most economical airfare in lieu of mileage and allowable meals and lodging as though the trip had been made on a commercial airline. The remaining travel time (in excess of air travel time) would have to be completed on the employee's time (non-working hours of vacation).*

Policy: University Business Procedures Manual: 550.20 Meals

*In the event that meals are included in a registration fee, no meal allowance should be claimed for that meal*.

**MSU can only reimburse travel that can be identified as business travel by the most economical and expeditious mode of transportation. Any personal travel made in conjunction with business travel must be clearly identified and deducted from business receipts as appropriate. Failure to do so may jeopardize the reimbursement of the business portion as well.**

* **Submit conference information with BPAs reimbursing for travel to conferences.**

1. **Backup should be sufficient to determine dates of conference and possible meals covered.**

* **Obtain direct flight cost information at time of booking when adding side trips to your travel.**

**Payment For Travel Expenses That Have Not Yet Occurred**

Policy: Montana Operations Manual: 1-0300.65 Airline Ticket Purchases; and UBS memo on Airline Travel Purchases

*Agencies are required to use the State’s purchasing card to purchase all airline tickets for* ***employee*** *travel unless it can be documented that another payment method is in the state’s best interest. This applies to ticket purchases made through a travel agent, purchased directly from an airline, or purchased from an online travel source. Additional information is available at the department’s air travel web site:* [*http://doa.mt.gov/doatravel/airtravel.mcpx*](http://doa.mt.gov/doatravel/airtravel.mcpx)

**Employee Travel, Student Travel, Non-Employee Travel: Every effort should be made to use a purchasing card for all travel related expenses incurred prior to the trip. Travel advances may be obtained by MSU Employees or Students without access to a purchasing card to avoid hardship or undue strain on personal finances. Montana Travel is available to assist MSU departments in obtaining airline tickets for non-employee travelers. The department authorizes the purchase of those tickets to the department purchasing card.**

**Use of the Travel Justification Form**

Policy: University Business Procedures Manual: 540.00 Travel Justification:

*The In-State or Out-of-State Travel Request and Justification form is required for all MSU employees or students who wish to travel out-of-state.  The original copy (if* ***NOT*** *being used as a Travel Advance) should be retained by the department and submitted with the Travel Expense Voucher upon completion of travel.*

* **Complete contact information on all Travel Justifications.**
* **Travel Justifications need to be submitted for approval prior to the trip when traveling out of state on grant or IDC/F&A indexes.**
* **Identify in the Where/Why section of the travel justification, any personal days planned in conjunction with the business purpose of the trip.**
* **Use photocopies of the Justification for purchasing card expenses, the original with the traveler’s BPA and Travel Expense Voucher after the trip. The only time a photocopy should be used with the traveler’s BPA/Travel Expense Voucher is when the original was used to request a travel advance and the department was sent a scanned copy of the justification to use for clearing purposes.**

**NEW \*\*\* TRAVEL CHANGES BASED ON GRANT AND/OR IDC (F&A) FUNDING SOURCES**

Change to Travel Expense Voucher when Travel is Split between Grant and IDC Funding

**The Office of Sponsored Programs would like a breakdown when the funding source for P-Card travel expenses are different than the funding source for reimbursement of travel expenses on the BPA.**

**Example: BPA reimbursement of expenses is on a grant(s); p-card expenses (airline ticket, registration) were paid from an IDC/F&A index(s). Please indicate the indexes with the list of P-Card Expenses on the BPA.**

Change to Travel Justification Form to Accommodate Check Box for Fly America Act

Policy: Code of Federal Regulations.

*The Fly America Act requires that all travelers and others performing U.S. Government-financed air travel use U.S. flag carriers to the extent such carriers are available, even if their use would cost more. Even when the entire trip cannot be made on U.S. flag carriers to the extent possible they should be used to the farthest interchange point on a usually traveled route. 301-3.6 (b)(4)(ii). Chartered flights are also subject to the requirements.*

**A check box will be added to the Travel Justification form to be checked when federal funds are paying for that travel. The check box can be used by either the Department or the OSP fiscal manager to identify the travel funding source.**