

Travel Guidelines and Information

All UF Travel Directives and Procedures can be found on [UF Finance and Accounting's Travel Directives and Procedures web page](#)

Travel Forms

BEFORE TRAVEL: Travel Authorization Form (TA)

Must be submitted a minimum of 5 business days prior to the travel date.

- All work-related travel requires completion of the TA Form, whether or not expenses will be incurred. This includes travel being compensated by a non-UF entity.
- The TA form can be accessed on the [department website](#).
- After submission of the TA, a confirmation email will be received within 30 minutes. If it is not received within this time frame, please send an email to hobi-fiscal@ufl.edu
- Any changes should be reported to the Fiscal team via the TA portal. This link is provided in the TA confirmation email.

AFTER TRAVEL: Travel Expense Report Form (TER)

Must be submitted within 5 business days of travel concluding.

- All business travel must be followed by completion of a TER. The TER is required by UF Travel to close out and finalize each trip.
- If the trip was fully compensated by a non-UF entity, a TER stating such is required as confirmation that UF is not responsible for any expenses.
- Submission of the TER is the process by which all travel expenses paid personally by the traveler will be reimbursed.
- Itemized receipts for all expenses associated with the trip should be submitted with the TER.
- The TA confirmation email mentioned above includes a TER form link, as the TA & TER are tied together on the back end for tracking purposes.
 - This link can only be used once to report that specific trip's expenses. Accessing the link will inform you whether the TER has already been submitted.
- After submission of the TER, a confirmation email will be received within 30 minutes. If it is not received within this time frame, please send an email to hobi-fiscal@ufl.edu
- Any changes should be reported to the Fiscal team via the TER portal. This link is provided in the TER confirmation email.

Travel Times

Travel times begin when travelers **leave their homes**, and end when they **arrive back at their homes**. This is to assure that meal per diems are calculated and reimbursed accurately.

Travel on Sponsored Projects

Most sponsors will cover reasonable and necessary travel costs incurred by the project personnel for travel that is directly related to the activity being funded. All travel and travel reimbursements shall follow the UF Travel Directives and Procedures and are subject to review and audit by the funding sponsor. Please keep in mind certain sponsored projects may contain award provisions that prohibit or limit the amount and type of travel and/or travel reimbursements. If at any time the funding sponsor conducts an audit and deems an incurred travel expense unjustifiable the traveler will be held responsible for personally reimbursing the sponsor. Principal Investigators and appropriate sponsored projects personnel should make sure any proposed travel is in accordance with the sponsored project's

agreement as well as UF guidelines before the travel begins.

Conference/Workshop Travel

Travel occurring for conference/workshop attendance ***requires*** submission of the (1) registration form and (2) detailed conference/workshop schedule or meeting agenda when submitting the TER. UF Travel will use these items to verify the reimbursements requested.

Airfare

- Airfare will be booked or reimbursed at the coach rate only.
 - If the traveler would like to fly business or first class, they must purchase the ticket personally (on a personal credit card) and will be reimbursed only the amount of a coach rate ticket. If the traveler elects to purchase a business or first class ticket, they must submit a coach rate itinerary showing the same flights and associated costs when submitting for reimbursement.
- If a traveler would like to upgrade an already purchased coach rate ticket (including Preferred Seating), the upgrade cost should be paid for personally and ***not*** charged to a department PCard. Travelers are not allowed to upgrade tickets on UF PCards, nor will any upgrade charges be reimbursed to the traveler.
 - If an airline upgrades a traveler at no cost, documentation that no additional fees were incurred must be provided with the TER.
- Travelers are allowed up to 1 day on domestic travel and 2 days on foreign travel to reach their destination. For example, a traveler can leave Tuesday for a domestic business meeting on a Wednesday.

For all travelers booking their own airfare and requesting reimbursement:

- When requesting reimbursement, documentation of the flights purchased must show the price paid and times of the flights. If insufficient documentation is provided UF will not reimburse.
- Any flight changes must be approved by the Principal Investigator (PI) or authorized coordinator and acceptable justification must be provided. Airfare changes typically incur a \$200 change fee from the airline in addition to the difference in airfare cost. Only under ***preapproved*** circumstances will these costs be covered by the department.
 - Examples of approvable circumstances include: changes in meeting times, illness, family emergency. Flights cannot be changed for the traveler's convenience or preference.
- If a traveler misses his/her flight(s) and as a result must book additional flights, justification must be provided as to why the flight was missed. This will be evaluated by the Travel office to determine whether the new airfare is reimbursable.
- Itemized receipts for all checked baggage fees \$25 and over must be provided for reimbursement.

Hotel

- UF Travel uses the U.S. General Services Administration's (GSA) [Per Diem Rates](#) for hotels as a guideline for acceptable hotel rates prior to approving hotel fees. Seasonal factors and special events are taken into account when determining acceptable rates. If a selected hotel's rate exceeds the GSA rate for a destination, you must provide justification for the higher rate.
- Per UF Guidelines, fiscal staff can only make hotel *reservations*, not pay the full cost of the stay in advance. Please make sure you determine standard (***not prepaid***) hotel rates to include on the TA.
- UF Travel can require a traveler to reimburse all or a portion of hotel rates deemed unacceptable.
- Travelers must obtain an ***itemized*** hotel receipt upon checkout to submit with the TER

- Hotel Expenses paid with a UF PCard:
 - **Allowed:** Room rates, taxes, internet, business calls (description of each call and business purpose required), and parking
 - **Not Allowed:** Room service, mini bar, movies, other expenses not listed as allowable. These expenses must be paid for by the traveler with a personal card when closing out the stay at the hotel.

If an unallowable hotel expense is charged to a UF PCard, the traveler may be responsible for calling the hotel and having the charge(s) reversed and transferred to a personal card.

Meals

- The University of Florida does not reimburse for meals when the travel is for a day trip only (does not involve an overnight stay).
- Receipts are not needed for per diem meal reimbursement.
- Meals for domestic trips are reimbursed at the State of Florida per diem reimbursement rate of \$36/day: Breakfast (6-8 a.m.): \$6, Lunch (12-2 p.m.): \$11, Dinner (6-8 p.m.): \$19.
 - The \$36 per day rate covers all meal costs during travel, including tips. Additional meal related expenses beyond the \$36 cannot be requested.
- Meals are reimbursed only when travel covers the entire set meal time window indicated above; travel during a portion of a time window is not reimbursable. For example, a traveler departing their home at 7:30 a.m. will not be reimbursed for breakfast.
- Meals for foreign travel are reimbursed at the U.S. Department of State foreign per diem rate, which varies depending on location. Instructions on finding these rates is included on the TA.
- Meals provided by hosts or otherwise during their travel must be excluded from the per diem reimbursement request.
- If the travel was associated with a conference or workshop, make sure to exclude any meals provided as part of conference/workshop registration from the per diem meal reimbursement request. UF Travel will verify these meals against the conference agenda.
- If a meal is purchased for a business related purpose for other employees or business associates during travel, such as a working lunch meeting, an itemized receipt, list of attendees, and the business purpose of the meal must be provided. This information can be submitted for reimbursement in lieu of the per diem reimbursement for the specified meal.

Personal Car Transportation

- Employees can elect to use their personal car for business related travel when desired.
- Reimbursement for business related travel in a personal vehicle (such as transportation to and from the airport for business travel, off campus work meetings, day trips) will be reimbursed at the State of Florida mileage allowance rate of 44.5 cents per mile.
- The 44.5 cents per mile rate covers all operating costs of the vehicle, including fuel. Additional fuel reimbursement cannot be requested.
- A detailed map of the traveler's journey that includes distances must be provided with the TER to justify the requested mileage reimbursement.

Portage

- Portage refers to assistance in carrying or transporting a traveler's luggage and other belongings.
- Portage charges will be reimbursed at a rate of \$1 per bag or \$5 total per occasion. No receipt is required.
- Each occasion where portage was paid should be reported separately on the TER.

Rental Cars

Enterprise Rent-A-Car/National Car Rental is the UF contracted vendor for rental cars and provides special discounted rates for UF employees.

- Economy and Compact class vehicles are the standard allowable classes for rentals. If a larger class is needed, justification for the larger size must be provided on the TA prior to booking.
- If Enterprise/National is not used for car rental and the chosen rate exceeds the Enterprise/National rate, you will only be reimbursed at the Enterprise/National rate.
- The Enterprise/National contract includes fuel fill up upon car return at no additional cost. Therefore, renters do not need to obtain gas prior to returning the car.
- Enterprise has a delayed billing system. Receipts are required for any Rental Car paid through the department business account in order for the travel to be finalized as the cost expected.

Receipts

- The traveler must obtain and submit all receipts at the conclusion of the travel, except for specific exempt items noted above (meals, portage).
- All receipts must be **itemized**.
- General non-itemized credit card receipts will not be accepted as proof of charges.
- Credit card statements will not be accepted as receipts. Credit card statements can be used to supplement itemized receipts, but they are not required.
- Any expense such as hotel, airfare, rental car, gas, etc. without an itemized receipt may be deemed non-reimbursable by UF.

Taxis

- Itemized receipts must be obtained for all taxi rides. If a hand written receipt is provided, make sure the taxi company name and trip details are included on the receipt.
- Maximum reimbursable gratuity for taxi rides is 15%. Additional gratuity above 15% will not be reimbursed to the traveler.
- Any "Other" or "Extra" charges listed on taxi receipts must be accompanied by an explanation, even when the charge is as little as \$1. Some additional fees charged by taxi companies are not reimbursable by UF.
- If a traveler uses a taxi for multiple trips on the same day during travel, a timeline of the taxi use corresponding to the receipts must be provided.

General Note:

- UF will not be held responsible for any personal or business related items that are left behind or stolen during travel. Please make sure to safeguard your belongings while travelling.