

Woody L. Hunt College of Business
Travel Guidelines for Faculty and Staff

Purpose:

This document guides Hunt College faculty and staff regarding business-related travel processes, documentation, and information to comply with state regulations and institutional policies.

State of Texas Regulations and UTEP's Institutional Policies:

Institutional Travel Policy

Hunt College guidelines were drafted based on the State of Texas and The University of Texas at El Paso policies. The Handbook of Operating Procedures (HoOP), Section 7, Chapter 6, discusses the institutional travel policy, which expands on and incorporates regulations by the State of Texas. The relevant subsections in HoOP are available at this [link](#). Some of the most important elements of the travel policy are reproduced below. However, we highly recommend that each faculty member become intimately familiar with the travel policy by consulting the HoOP directly.

General Information

According to Section 7, Chapter 6, Item 6.1.1, Employee's Responsibility: "All University employees are Texas state employees, and therefore required to be aware of the state laws and the rules and regulations governing travel by state employees. Failure to comply with these laws, rules and regulations could result in non-reimbursement of travel expenses and/or disciplinary action up to termination, and/or prosecution in the case of fraudulent misrepresentation of travel expenses. Additional information regarding travel regulations is available from the University Accounts Payable Office.

Stricter guidelines may be imposed by individual departments and, in addition, some sources of funds may impose additional restrictions, (e.g. contract and grant funding)."

Section 7, Chapter 6, Item 6.2, Travel Authorization further requires the following:

6.2.1 Prior Approval

Prior supervisory approval for all business travel is required for absences from the University campus (or other designated headquarters) for periods of half a day or more during the normal working period, whether or not there is a cost to The University.

6.2.2 Request for Travel Authorization

6.2.2.1 A Request for Travel Authorization must be completed prior to travel, and approval is delegated to the immediate supervisor. Approved requests must be routed through the department chair or director and forwarded to the appropriate Dean or other administrative officer for approval."

6.2.2.2 The request for Travel Authorization must state the traveler's name, dates of travel, destination, purpose and benefit of travel, and the cost center/project to be charged. Appropriate arrangements for disposition of duties must be made in advance of the travel. Travel requests by faculty members must contain a statement describing the disposition of work and/or classes missed during the period of travel. If classes are to be missed, a qualified member of the instructional staff shall be identified and approved by the departmental Chair as a substitute instructor. Under normal circumstances, classes should not be rescheduled.

Procedure

All University travel must be arranged through Anthony Travel (domestic and international travel) or Anthony Travel's SAP Concur online booking website (domestic travel only).

Submit travel reimbursement requests within 90 days after completion of travel. If the reimbursement is requested after the 90-day period, it will be reported as taxable income on employee's W-2, per IRS regulations.

For In-State Travel (State of Texas): Employees are required to use State contracted hotels (some exemptions apply) and are exempt from Texas state hotel occupancy tax. Employees must present completed tax exemption certificate when checking in.

All University employees are responsible for assessing the health, safety, and security risks of University-sponsored international travel, with special consideration for High Risk travel. General rules specific to international travel:

- State funds cannot be used to for International Travel.
- Employees must have advance approval by the University International Oversight Committee (IOC) when traveling to countries on the U.S. Department of State's warning list, including daily travel to Mexico.
- Employee must register with International SOS.
- Employee must book travel arrangements through Anthony Travel unless travel is paid by an outside entity (no cost to the University). This includes airfare, hotel, and car rentals.
- The Business Center will convert travel expenses to US dollars on expense report using the exchange rate (www.xe.com) applicable on travel dates.
- Foreign per diem rates are based on U.S. Department of State per diem tables.
- No overage can be paid on "Meals and Incidentals" as it is accounted for on the expense per diem rate.

Student Travel Policy

Additional documentation is required for student travel, and specific policies have been established for this purpose by the Vice President of Student Affairs (VPSA). All faculty and staff must comply with these policies and complete the required documentation before a student trip. For more information, visit the VPSA's [website](#) or contact them directly.

Travel Authorization and Reimbursement Process

Failure to comply with the policies and procedures outlined below could result in non-reimbursement of travel expenses.

Step 1: Travel Authorization Form

The travel authorization in PeopleSoft must be fully approved before any travel arrangements are made. To request a travel authorization, all faculty and staff must submit their requests through the Hunt College Business Center by using the travel authorization form available on the [Business Center website](#).

Travel Authorization Form – The following items must be attached to the Business Center "Travel Authorization" form when requesting approval to travel:

- Funding Approval: e-mail or letter from the funding approver detailing the amount, funding source (cost center number or cost center name), and any details as to what will be funded (especially if there is a limited amount that will be allotted for the trip, e.g., \$500 to cover only airfare, etc.). All travelers must ensure that funding is available before submitting a travel authorization. The funding approver may vary depending on the purpose of the trip and the traveler, but the traveler's direct supervisor is the best person to consult first.
- Travel Budget Worksheet: this is mandatory and must be attached to the travel authorization form (please see the example in Appendix I; the actual document can be found on the Business Center website under "Useful Resources"). The worksheet must be filled out completely, and estimated expenses must be listed for each

travel day. When applicable, the traveler must indicate which days are for business and personal purposes. Please note that a day before or after the business days of the trip are considered business days, depending on the travel destination. If personal travel dates are included in the itinerary, the traveler might be responsible for a portion of the flight expense (constructive airfare cost vs. actual airfare cost). Per state regulations and institutional policies, reimbursements of expenses incurred on personal days are not allowed.

- Conference/ Meeting Agenda: This is required for each business-related day. The agenda must indicate a clear reason for the meeting and how it aligns with the traveler's position at UTEP. For academic/research-related travel, faculty members must explain how this activity will benefit their development as scholars and benefit their department, college, and University. For conferences, please include a copy of the conference itinerary and a copy of the paper acceptance letter/email.

Additional documentation required on the Business Center "Travel Authorization" form:

- For International Travel. Employees must have advance approval by the University International Oversight Committee (IOC) when traveling to countries on the U.S. Department of State's warning list, including daily travel to Mexico. The IOC form must be attached to the Business Center "Travel Authorization" for international travel.
- For Faculty - Departmental Approval. An email with approval from the traveler's department chair must be attached to the travel authorization form. This email should include the requested travel dates and purpose. Also, if classes are missed while on travel, the faculty member must include detailed arrangements that have been made with the approval of the department chair to ensure that all teaching/classes will meet and students will remain fully engaged. Simply canceling classes for professional travel is not acceptable under any circumstances.
 - Department Chairs will follow the same process and obtain approval from the Dean.
 - Associate Deans will obtain approval from the Dean and notify Department Chairs on teaching duties.

If the faculty member plans to take a group of students on a trip, a list of students' names and student ID numbers must also be attached. The faculty member must comply with the student travel guidelines and submit the required documents to VPSA. Please visit the [Travel Office](#) website for more information.

For PhD Student Travel: The trip has to be discussed and approved by the Ph.D. Program Director; therefore, an email with approval from the Ph.D. Program Director is required and must be attached to the travel authorization form. The email should include the requested travel dates and travel purpose. If the Ph.D. student is teaching a class, the student must ensure that class duties are adequately handled. Therefore, the Ph.D. student is also required to include an email from the Department Chair on the travel authorization form. The email must clearly state that the Department Chair accepts the alternative teaching plan to ensure that all teaching responsibilities are met and are not affected due to the proposed travel. Like all other faculty members, canceling classes because of travel plans is unacceptable under any circumstances.

For Staff Travel: The staff member must ensure that the trip is pre-approved by his/her direct supervisor (Department Chairs must pre-approve travel for staff members in their respective departments) and include the approval email in the travel authorization form. If the staff member plans to take a group of students on a trip, a list of students' names and ID numbers must also be attached. The staff member must comply with the student travel guidelines and submit the required documents to VPSA. Please visit the [Travel Office](#) website for more information.

After submitting the Travel Authorization form with the required documents listed above, the Business Center will process the travel request in PeopleSoft. Once the Business Center completes the travel authorization, an email will be sent to the traveler, explaining that the authorization was processed and is pending review and approval at the central administration office (Accounts Payable Office). After the travel authorization is fully approved in PeopleSoft, a separate email will be sent to notify the traveler that he or she may contact Anthony Travel to make the travel arrangements. Please be aware of the following:

- All state employees must use the UT System-contracted travel agency Anthony Travel. Deviating from this policy will result in non-reimbursement of flight expenses.
- Once the traveler receives the flight itinerary from Anthony Travel, the traveler must forward the itinerary and the reservation number to the Business Center.
- If any changes need to be made to a traveler’s flight itinerary (e.g., cancel or change a flight), the traveler must contact Anthony Travel directly. Please do not contact the airline.
- When a trip consists of multiple destinations, a Travel Authorization form must be completed for each travel location. The traveler must ensure that all destinations are detailed on the travel budget worksheet.
- If the traveler is driving rather than flying to the travel destination, please note that per institutional policies, he or she will only be reimbursed the lesser of these three:
 - Constructive airfare
 - Constructive rental car quote (including estimated gas price information)
 - If a personal vehicle is used, total mileage will be calculated using MapQuest. Please note that gas receipts are not included when using a personal vehicle.

Therefore, the traveler must review these costs before making travel arrangements to understand the appropriate reimbursement amount.

Step 2: Travel Reimbursement

Once the traveler returns from the trip, she or he must submit the required documentation through the Business Center “Reimbursement” form. Please note that in compliance with IRS Publication 463, the Accounts Payable Office at UTEP asks that reimbursement requests be submitted to their office within 90 days of the return date of a business trip to remain non-taxable. An explanation for the delay in submission will be required for a reimbursement request the 90-day threshold.

Please attach all applicable documentation listed below to the “Reimbursement” form:

- Flight Itinerary received from Anthony Travel: the flight itinerary is always required, even if purchased with personal funds or by an outside entity. If a personal or rental vehicle was used, include the following information:
 - Constructive airfare
 - Constructive rental car quote (including estimated gas price information)
 - If a personal vehicle was used, please submit total mileage from MapQuest. Please note that gas receipts should not be submitted when using a personal vehicle.
- Conference receipt: If seeking reimbursement for conference registration fees, please attach a receipt. Conference fees cannot be reimbursed until after the conference. The receipt must show the amount, payment method, the conference's name, and dates of the conference. If the traveler requests that the university pay the conference fee, it is their responsibility to acquire an invoice and submit it to the Business Center in a timely manner. Travel funding cannot be used to pay membership fees in an academic organization.
- Conference/ meeting agenda: This is required for each business-related day. The agenda must indicate the purpose of the meeting and allow for easily assessing how it enhances the College’s and UTEP’s UTEP mission. For academic conferences, please explain how a meeting would benefit your research. Please include a copy of the conference itinerary and a copy of the paper acceptance letter/email.
- Lodging itemized receipt: Travelers must present an official receipt with itemized expenses and taxes for each day. It must also include the method of payment. Such receipts must be obtained directly from the hotel. Receipts from website bookings/confirmations (e.g., booking.com, expedia.com, etc.) are not acceptable.
- Transportation receipts: the traveler must submit taxi and ridesharing receipts (e.g., Uber, Lyft, etc.), public transportation receipts, and car rental itemized receipts (gas receipts are necessary only when renting a car). Please note that transportation from your residence to the El Paso International Airport is not reimbursable. Only transportation from UTEP to the El Paso International Airport is accepted.

- Parking receipts include parking at El Paso International Airport, the hotel, and street parking.
- Incidental receipts: include all other minor expenses incurred during business-related travel, such as baggage fees. Please note that some expenses are not allowed per institutional policies; please review these on the HoOP.

All receipts submitted for reimbursement must include the method of payment used. If the payment method is not shown on a receipt, a copy of your bank/credit card statement showing the charge is necessary. Please remove all other account information/expenses from statements.

Step 3: Reimbursement Approval Process

Once the Business Center staff completes the traveler's reimbursement in PeopleSoft ("Expense Report"), the traveler will receive an email from PeopleSoft with a link to review the reimbursement. The traveler must review the document, and if everything is correct and all is completed, the traveler must click the "Reviewed" button for it to continue processing.

Once the traveler has reviewed the reimbursement document in People Soft ("expense report"), the traveler WILL NOT have the option to add additional expenses for reimbursement. Please ensure that all applicable documents/receipts are attached to the initial request.

The traveler will receive an automated email notification when the travel reimbursement is fully approved. Funds will be issued via direct deposit if the employee has previously set this up. If direct deposit is not set up, a check will be mailed to the employee's address on record.

Travel Funding

Faculty Research Funds

"College" funds are based on available funds; the College will financially support a tenured, tenure-track faculty member for travel to attend academic conferences with a budget of \$3,750 per fiscal year. Each department has committed an additional \$300 per academic year that can be used toward registration fees only. Travel funds cannot be saved, transferred to other accounts, or rolled over to future academic years. Ultimately, all travel funds are subject to budget availability. Funding eligibility will be determined as follows:

- The faculty member must present a paper at a widely recognized academic conference, typically associated with a particular business discipline.¹ Travel to conferences associated with predatory journals are not eligible for travel funding. Please consult with your respective department chair to ensure the eligibility of a conference before your paper submission.
- Faculty holding endowed positions must use their endowment funds for professional/research travel. Ensuring that the use of endowment funds complies with the endowment agreement is important. All state and institutional policies must be followed regardless of the funding source.
- Productivity in terms of peer-reviewed articles successfully placed in each discipline's targeted journals will be reviewed by the Associate Dean for Faculty, Research, and Graduate Programs to assess continued travel support after the faculty member's first three years of service at UTEP.
- Any designated travel funds (i.e., startup funds) included in initial offer letters to new faculty will be covered based on the written agreements only.
- Full-time non-tenure track (NTT) faculty members can be allocated up to \$1,500 per academic year for travel purposes. This funding must directly support NTT faculty members to maintain the highest possible faculty classification per AACSB requirements. NTT faculty must directly state how travel supports this effort in their travel request. All travel must be approved by the NTT faculty member's department chair, who is expected to indicate how this travel enhances the AACSB faculty classification status.

¹ In rare circumstances, travel for other university enhancing reasons may be requested and will be reviewed for approval by the Associate Dean for Faculty, Research, and Graduate Programs on a case-by-case basis. A reasonable justification must be provided.

- Faculty Advisors of student organizations: Hunt College will provide financial support to a faculty/staff member who is assigned as a faculty advisor for a UTEP registered student organization (RSO), which is in good standing with the BCC- Business College Council (please review BCC Bylaws for reference). The financial support will be for expenses associated with traveling with the student organization members to professional conferences, case competitions, and corporate tours organized by the student organization. The funding support will be up to \$1,500 per fiscal year and is contingent upon availability. Please note that endowed professors are expected to use endowment funds (if the endowment agreement allows it) and will not qualify for these funds.

The Dean's office reserves the right to change or eliminate fund allocations at any time during the fiscal year due to budget cuts, availability of funds, or any other circumstance that the Dean of the College considers important to continue the enhancement of the College as a whole.

Funding for Staff Travel

Staff of the college may travel for three purposes:

1. Lead a Group of Students: Examples include study abroad programs, corporate tours, case competitions. Availability of funds must be confirmed with the CAO; Dean's approval is needed before travel authorizations are requested.
2. Trips for Specific Business Purposes: Examples are, but not limited to, meeting with corporations, attending meetings or conferences to present projects or work being done in the College, AACSB meetings and conferences, and student recruiting (Ph.D. Program, etc.) Availability of funds must be confirmed with the CAO; Dean's approval is needed before travel authorizations are requested.
3. Professional Development: Conferences and/or training must be relevant to the position of the staff member traveling. The direct supervisor must have a professional development plan for the employee to detail the benefit of the trip fully and ensure that this is included in the staff member's performance evaluation goals.

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Funding for Student Travel

Undergraduate Faculty Led Programs funding: Hunt College's undergraduate students are encouraged to participate in the Faculty Led Programs organized by the College. The College will determine the funding per student for one experience in the Faculty Led programs during their time in the undergraduate program upon availability of funds. The College will not support other study abroad programs from other colleges, even if the student is from Hunt College.

Corporate Tours: Hunt College students are encouraged to participate in corporate tours organized by the College. The College may be able to support some of the corporate tours based on availability of funds.

Student Organization Travel: The College may be able to support student organization travel to conferences that support their professional development. Funding is contingent upon availability and students complying with all college requirements.

Case Competitions and Conferences: Students are encouraged to apply for travel support by submitting the Professional Development Travel Support form. Each request will be reviewed, and funds will be awarded based on the availability of funds and eligibility of the student.

PhD students Travel to Academic Conferences: These may be funded by the college or faculty members. Ph.D. students are encouraged to review financial support opportunities with the Ph.D. Program Director for more information and guidance.

For any funding provided by the College, the Dean’s office reserves the right to change or eliminate travel funds at any time during the fiscal year due to budget cuts, availability of funds, or any other circumstance that the Dean of the College considers important to continue the enhancement of the College as a whole.

All students supported with College funds must purchase their flight tickets through Anthony Travel (the UT System contracted travel agency). Failure to comply with this requirement will result in the cancellation of the student’s reimbursement request.

Appendix I

Travel Budget											
Name:											
Date of travel:											
Destination:											
Cost Center:											
Purpose:											
Benefit to UTEP:											
Additional Comments:											
Traveling Dates	Business or Personal day?	Description of business travel on specified date	Lodging	Lodging Tax	Meals	Registration Fees	Airfare Cost	Car Rental, Parking, etc.	Ground transport: Taxi, bus, train, etc.	Other Mileage: (if personal vehicle used)	Total Estimated Expenses
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Amended:

October 2024.