Travel

Brigham Young University uses the following procedures to reimburse employees, students, and non-employees and to pay travel vendors for all necessary and appropriate transportation and travel-related costs incurred with approved university activities. The Chrome River system is used to file a pre-trip approval document called a Pre-Approval and a post-trip reimbursement document called a Travel Expense Report. For instructions and training on this system, enroll in the Chrome River training sessions offered in Training LMS. For specific questions, contact our Help Desk at **801-422-5644.**

**University On-Site Reservation Services**

To provide optimum service levels and preferred pricing on travel arrangements, university employees are required to arrange all airfare, lodging, car, and bus rentals with travel agents at Purchasing & Travel. University employees should contact a travel agent as soon as they know travel dates and destination information to give travel agents as much time as possible to secure optimal fares and schedules.

Occasionally, travel arrangements from outside sources may need to be taken into consideration. Examples include special proprietary tour packages or external organization negotiated fares. Discuss these arrangements with your travel agent. If they approve of the purchase, they will send an approval email that can be submitted with receipts on your Travel Expense Report or through a Fast Track request authorizing the purchase.

**Travel Pre-Approval**

All employees, students, and non-employees traveling on university-approved business must have a Pre-Approval in Chrome River for each trip that requires them to be away from home overnight and/or requires them to use commercial transportation. Pre-Approvals are not required for same-day travel without commercial transportation (use of UTA Frontrunner, Trax or bus is excluded from this requirement). The Pre-Approval should be filed at least 10 days prior to travel whenever possible. Pre-Approvals are approved by the designated approver established in Y-Matrix by the college/division controller. The Pre-Approval must be fully approved before travel agents can book travel reservations. The Pre-Approval must also be fully approved before travel occurs.

When traveling in a group, a Pre-Approval must be filed for each employee that will be seeking reimbursement after returning from their trip. For your convenience, Chrome River offers functionality to duplicate a completed Pre-Approval when multiple employees are traveling as a group.

There are five types of Pre-Approvals and Expense Reports in Chrome River:

**Individual Travel**:  An Individual Travel trip involves an employee (not a student employee) who travels on behalf of BYU alone or with others but will be making purchases separately. These trips are less than 30 days long.

**Extended Travel**:  An Extended Travel trip involves an employee (not a student employee) who travels on behalf of BYU alone or with others but making purchases separately. These trips are 30 or more days long.

**Group Travel**: A Group Travel trip is filed by an employee acting as a group leader of a group of BYU students. Generally, the group leader will incur trip costs for the group on their university credit card and will complete the Travel Expense Report. The group leader can also complete a separate Student Travel expense report linking it to the Group Travel Pre-Approval to reimburse business expenses incurred by a student participant.

**Student Travel**:  A Student Travel trip involves a student who will incur travel expenses personally that will need to be reimbursed. Risk Management needs to approve any Pre-Approvals that involve the following:

1. Not using commercial carrier transportation (plane, bus, train, taxi/cab, subway, etc.)
2. Using or riding in a personal vehicle
3. Driving more than 10 hours in 24-hour period
4. Any combination of working, studying, attending class, or other activities will exceed 14 hours in a 24-hour period (Note: driving between the hours of 12:00 a.m. (midnight) and 6:00 a.m. is discouraged unless within fifty miles of the destination).

In such cases an [Assumption of Risk](https://risk.byu.edu/insurance/personalvehicleuse.php) form should be attached to the Pre-Approval

**Non-Employee Travel**:  A Non-Employee Travel trip involves travelers who are neither BYU students nor employees, who are traveling by request of the university.

**Cash Advances**

Cash advances are requested on a Pre-Approval for extended travel or group travel. The university functions under the IRS Accountable Plan Rules. Therefore, advances may be obtained and used only for business expenses by a university employee in active travel status.

University employees acting as a travel group leader may obtain cash advances of per diem for student participants on the same trip. In such cases a disbursement log should be maintained in which each student signs they received their allocation of the per diem. The log is then included with other receipts associated with that trip.

University issued credit cards generally eliminate the need for cash advances. In addition to convenience, the credit card reduces financial risk of carrying cash or cash products. Therefore, advances are issued only to university employees for extended trips over 30 days or on trips in which the employee is acting as a group leader. Advances are not issued to individuals traveling for less than 30 days. If cash is needed on these trips, it can only be obtained with approval from the college/division controller authorizing an ATM cash withdrawal limit on the employee's Travel or Corporate card.

When approved in Chrome River, a cash advance is deposited to the bank account established in My Financial Center 10 days prior to departure.

The university considers a cash advance (whether through Chrome River or from an ATM) as a personal loan. The traveler must account for the cash advance within 30 calendar days of returning from their trip. After completing the Expense Report, if an employee owes money back to the university it will be recorded as an amount due in My Financial Center. The employee can pay that amount due within that system. Travel advances left unsubstantiated and unspent balances not returned within 60 days will be reported on the compliance report distributed to the college/division and as taxable income to the employee.

**Travel Expense Report**

All employee, student, and non-employee expenses for university-approved business must be recorded in a Travel Expense Report in Chrome River within 30 calendar days after the end date of a trip. All trip expenses incurred must have an express business purpose. Travelers must not report personal expenses on the Travel Expense Report. A department designated approver is required to review and approve Travel Expense Reports before any payment can be made.

Travelers must submit electronic images of the original, itemized receipts for each expense exceeding $50 claimed on the Travel Expense Report. All required receipts must show the vendor, transaction date, detailed description of the goods or services purchased, the amount paid, and the form of payment. Corporate charge card slips are generally not acceptable since they do not contain all the required elements of the receipt. Travelers do not need to submit receipts for meals when they are electing to claim per diem.

If required, original receipts are lost it is no longer necessary to complete a Lost or Missing Receipt Affidavit, if instead, an explanation of the attempts made to obtain a duplicate receipt are entered into Chrome River when the receipt rule dialogue box is triggered. That explanation will need to be approved with the expense report by designated approver(s). The expense report will additionally be reviewed by the Chrome River help desk. If the help desk determines that a receipt can be reasonably obtained (such as for a hotel stay, or local restaurant purchase), the report may be returned and a request for a duplicate receipt made.

All original receipts and documentation should be retained long enough to verify that the receipt has been properly saved, reviewed, and approved in Chrome River.

Employees functioning as a group leader should book airfare, lodging and other expenses on a university Travel or Corporate card. Upon returning from a group excursion, the group leader must import all travel card transactions into a Travel Expense Report within 30 calendar days.

University credit cards are the preferred method of payment while in travel status. Refer to the university credit card procedures for more information about these cards.

Expense reports are approved by the designated approver established in Y-Matrix by the college/division controller.

**Research Contracts**

Many research contracts contain certain requirements by the sponsoring agency, especially when foreign travel is involved. Travelers should consult with Grants & Contracts Accounting when planning foreign travel under federal or nonfederal contracts or awards. Please note that most federal agencies require the use of U.S. air carriers and that certain awards have per diem limitations which may differ from regular university travel policy. All Pre-Approvals and Travel Expense Reports that use research contract accounts will be routed by Chrome River to Research Accounting for approval in addition to the normal department approvals.

**Local Travel**

Strictly on-campus mileage or normal commuting mileage to and from work is not reimbursable under any circumstances. Travelers required to use privately owned vehicles for local travel will receive reimbursement at the current IRS mileage reimbursement rate for business miles. These miles should be recorded on a mileage log and submitted in a Travel Expense Report. Mileage logs should be submitted at least once per semester. University vehicles should be used whenever possible for local travel.

**Extended Travel**

Full-time employees traveling for extended periods of time (at least 30 days but not more than one year) may either travel under the regular travel policy or receive approval from their department for an extended per diem to cover all expenses of the trip. The negotiated per diem rate may not exceed the maximum federal per diem rate for meals and lodging for the specific approved travel destination(s), as published by the U.S. General Services Administration at [www.gsa.gov](http://www.gsa.gov/). Purchasing & Travel can assist in planning extended trips and in determining appropriate per diem allowances within the published federal rates.

Under either method, payment to the traveler can be provided as follows:

* The preferred approach is to reimburse the traveler as reimbursement requests are regularly submitted through Chrome River (e.g., monthly, quarterly). Claims for extended per diem are made after the dates transpire, they cannot be claimed into the future. Claims are listed as Extended Trip Per Diem under the Miscellaneous mosaic tile of the Travel Expense report in Chrome River. Reimbursements are direct deposited to the traveler's designated bank account.
* Though discouraged for personal safety reasons, cash advances may be provided in advance of the trip. These large advances will need the approval of Cash Advance managers. A final Travel Expense Report will need to be filed in Chrome River within 30 days of the conclusion of the trip to clear the advance and bill necessary charges to the university department.

**Travel at Vendor Expense**

Employees should not accept complimentary travel, hotel or food expenses paid by a vendor where the purpose of the vendor is to sell or promote a product or service. This does not apply to training trips regarding equipment or services that the university has or will make payment as part of the purchase price.

**Personal Vacation While in Travel Status**

A traveler must indicate any personal expenses incurred during their business trip on the Travel Expense Report. Such expenses include but are not limited to airfare, hotel, car rental and per diem meals. Personal portions of airline tickets should be paid at the time of ticketing with the BYU travel agent. Personal expenses associated with a hotel and/or car rental need to be allocated as Personal on the Travel Expense Report allocation section. Personal meal periods during the trip need to be deducted from the overall per diem claimed on the Travel Expense Report.

**Travel Companions**

Family, spouse, or other persons may accompany travelers traveling on university business. However, if such persons are to travel at university expense, advance approval must be obtained through their department in consultation with the Tax Office. The express business purpose of the companion’s travel must be documented on the Pre-Approval. The completed [Family Travel Substantiation](https://finserve.byu.edu/sites/default/files/Family_Travel_Self_Reporting.pdf) form should be provided the Tax Office and attached to the Pre-Approval. Additional expenses incurred because of a travel companion without a business purpose should be identified as personal expenses.

Unrelated persons of the opposite sex should exercise sensitivity and good judgement when traveling together to avoid the appearance of impropriety and so as not to compromise the integrity of appropriate personnel relationships or to reflect poorly on the university or The Church of Jesus Christ of Latter-day Saints. A person who feels uncomfortable or unsafe traveling in a one-on-one situation with someone may choose to make other travel arrangements.

Unrelated travel companions of the opposite sex must stay in separate lockable rooms during travel. Unrelated travel companions of the same sex may share a room only if no power differential exists (e.g., professor and student) and both agree to the arrangement; however, in no situation should unrelated travel companions of the same sex be required to share a bed (each must be provided with a separate bed).

**Independent Contractor Travel**

All costs incidental to travel of independent contractors are the sole responsibility of the contractor.

**Air Travel**

Air travel accommodations must be coach or special fare class only. First class air travel is not an allowable expense. Travelers are responsible to book air travel at the most economical rates using normally traveled routes. Travelers should make every effort to take advantage of all advance purchases, Saturday night stay, promotional flights, reasonable non-direct flights, conference fares, special negotiated fares, departing and arriving at times slightly less than convenient and any other reasonable savings opportunities which do not compromise the effectiveness and purpose of the trip.

Air carrier selection cannot be biased by a traveler’s frequent flyer affiliation. The lowest cost air travel will take precedence over frequent flyer programs. Any employee choosing a more expensive flight plan to take advantage of a promotional program such as a frequent flyer plan will be required to pay for any differences personally in excess of $50.

Enhanced coach, seat upgrade fees, or other airfare ancillary fees must be approved by the traveler’s university department. Travel agents will record the verbal approval that the additional fees have been approved in the traveler’s record.

Frequent flyer miles earned on travel funded by the university are maintained and redeemed individually by university travelers. Any frequent flyer miles earned while traveling on university business may not be exchanged for cash. Likewise, the university cannot reimburse travelers for their use.

When booking air travel, travelers must provide the fully approved Pre-Approval number and the university approved billing account to the on-site travel agent. Travel cannot be booked unless the trip has been fully approved.

If during consultation with a travel agent it is determined that an outside vendor is a better option over a university fare, the travel agent may send an email authorizing the purchase from the outside vendor. Both the receipt of purchase and the email authorization must be included on the Travel Expense Report.

Unused airline tickets are the property of the university and must be used for future business trips by the traveler. Travelers should notify their travel agent of the unused ticket when booking their next trip. Tickets being held for exchange on a later trip may not be used for personal travel unless the value of the ticket is paid personally by the university employee.

Travelers that book their airfare using the university central bill or university corporate/travel card will automatically receive, at no cost to themselves or the university, $500,000 travel accident insurance from JPMorgan. Additionally, all university business travelers have coverage under the university's blanket travel insurance policy. Questions about insurance coverage should be addressed to University Risk Management at **801-422-4468**.

**Airfare Equivalency**

Whenever a traveler elects to drive instead of flying the Airfare Equivalency Worksheet for Travelers Electing to Drive should be completed prior to travel. This form allows travelers to claim the mileage reimbursement between the departure and destination cities at the current reimbursement rate set by the IRS or a calculated airfare equivalency (whichever is less). Per diem and hotel expenses for transit days may not be reimbursed when the traveler is electing to drive.

A traveler electing to travel by rail or bus should similarly document that their expenses do not exceed that which would have been incurred had they flown.

**Automobile Rentals**

The university reimburses the cost of a rented automobile when suitable or less expensive local transportation is unavailable or when routing and time factors make it more advantageous than Uber, Lyft, taxi, or other ground transportation options. Travelers should only use a rental vehicle when it is not possible or practical to use a university vehicle.

The university's primary car rental suppliers are National, Hertz and Enterprise. Use of these companies’ contracts results in discounts off normal rates, complete insurance coverage, lower age requirements, and good vehicle availability both on and off airports nationwide.

Travelers should rent mid-size vehicles. In exceptional cases, the university will reimburse the use of larger vehicles (for example, several travelers in one vehicle, equipment transported, etc.). Travelers should refuel the rental car before returning it to avoid the high cost of gasoline at the rental agency.

When traveling internationally, travelers should purchase all available insurance. International travelers can seek reimbursement for additional insurance purchased. When traveling domestically, travelers should decline any additional insurance coverage that desk agents may offer. Domestic travelers will not receive reimbursement for additional insurance coverage purchased. The university's corporate insurance policy combined with vendor car rental contract terms and conditions covers domestic insurance for travelers. In case of an accident, contact the car rental agency and University Risk Management at **801**-**422-4468**.

**Privately Owned Vehicles**

Travelers should abide by the University Travel Policy regarding use of personal vehicles while in travel status. Reimbursement for mileage will be at the IRS approved mileage rate and can be claimed on a Travel Expense Report under the Personal Vehicle section.

There is no reimbursement for the cost of repairs, maintenance, damages, or towing charges associated with a personal vehicle as these expenses are considered included in the IRS mileage rate. When traveling in a privately owned vehicle the driver’s personal insurance will be the primary insurance.

**Motor Pool Travel**

When traveling by automobile, travelers should use university vehicles whenever possible before seeking other alternatives. Transportation Services assigns motor pool vehicles in order of travel request and vehicle availability. Passenger cars and vans are most frequently available, and by making special arrangements, trucks are available.

Motor Pool vehicle are often billed per mile. When combining personal vacation with a business trip, employees are responsible to log personal miles and reimburse their department for these miles. Employees electing to request a larger vehicle than is required for the travel business purpose must reimburse their department for the additional cost incurred.

Travelers must report mechanical failure or accidents to the Motor Pool immediately at **801-422-5544**. For additional policy see Physical Facilities Transportation Services.

**Meal Per Diem**

Travelers in approved travel status and same-day travelers away from home at least 12 hours are entitled to a meal per diem allowance. The university uses as a guide the per diem allowance amounts set by the IRS.

Per diem is an all-inclusive allowance established and governed by current tax laws and its use is for meals and incidental expenses. Travelers must elect to file a Travel Expense Report using the per diem or claim actual expenses, but they may not mix the two options on a given trip. There is no allowance for additional charges for other meals, fees or tips to waiters, porter, baggage or bell persons, television and in-room movies, laundry, or transportation between places of lodging and dining.

Per diem is allocated in the destination city time zone by meal period as follows:

|  |
| --- |
| **Meal Time Periods** |
| 6:01 a.m. to 12:00 noon | Breakfast |
| 12:01 p.m. to 6:00 p.m. | Lunch |
| 6:01 p.m. to 12:00 midnight | Dinner |

*(NOTE: The period of time from 12:01 a.m. to 6:00 a.m. may be used to extend either the breakfast or dinner meal period as needed.)*

Whenever a meal is provided a traveler (for example as part of a conference, breakfast provided by a hotel, participating in a hosted meal, etc.) then the meal period should be deducted from the overall per diem claimed on the Travel Expense Report.

The Per Diem Table is based on the city and county you are traveling to. If your city is not listed in this table, you need to determine if the county is listed. Use the [National Association of Counties Website](http://www.naco.org/Counties/Pages/CitySearch.aspx) to find the county of the city you will be traveling to. If your county is not listed, then it is the lowest per diem level. The per diem rate for travel to foreign countries, Alaska and Hawaii are the highest per diem rate.

**Airport Transportation**

The university offers a discounted rate with airport shuttle companies for transportation to the Salt Lake International Airport. Contact Purchasing & Travel for current vendors. You must identify yourself as a university employee when making the shuttle reservation and a BYU ID must be presented to the shuttle driver to receive reduced rates.

Travelers using personal vehicles to travel to and from the airport may request mileage reimbursement for the trip(s) taken to the airport plus applicable airport long-term parking costs.

**Lodging Expenses**

Travelers should use standard accommodations in reasonably priced, commercial-class properties. The traveler should use the university travel/corporate card to pay for lodging and to guarantee room reservations whenever possible.

Travelers should coordinate/book hotel reservations through Purchasing & Travel. This practice insures the lowest possible cost, inclusion of all available discounts, and contract hotel availability.

Travelers do not receive reimbursement for lodging costs when they stay with friends or relatives. However, when traveling away from home overnight, a $10.00 amount is allowed for each day of housing provided by family or friends. Travelers may use this allowance along with the regular meal per diem allowance, if applicable, to provide a gratuity to the host.

In-room movies, mini-bar charges, concierge services and other in-room services are not reimbursable beyond the approved per diem. Travelers should not charge long distance telephone calls on the hotel bill. Travelers should use a cell phone or a Veracity long distance number to have calls billed to the university. Veracity long distance codes can be ordered from the work tab under campus links on the myBYU page.

**Conference Registration Fees**

Conference registration fees should be paid using a university credit card whenever possible. Where university credit cards are not accepted, the traveler should use Fast Track to request payment for the conference.

When attending a conference and claiming per diem, the traveler must reduce from their per diem any meals provided by the conference along with any other meals provided to the traveler. Attaching a copy of the conference registration or agenda that indicates meeting dates and meals provided by the conference is encouraged and is helpful to travelers, delegates, and approvers in determining and monitoring allowable travel expenditures.

**Hosting and Entertainment**

Occasionally, it may become necessary to host people while traveling. Costs for approved hosting activities are reimbursable only under the following conditions and with documentation of the specific business purpose:

* The hosting employee must submit on the Travel Expense Report the business purpose of the meal and the names and affiliation of persons hosted. The employee must submit complete, actual receipts for the meal to receive reimbursement.
* All university employees participating in the hosted meal must deduct that meal period from their overall per diem.

**Moving and Temporary Relocation Expense**

Moving expenses for permanent relocation of either incoming or outbound employees are covered under the University Moving Policy. These expenses should not be submitted in Chrome River. Contact the Tax Office for questions on the moving policy.

**International Travel**

Additional security, health, and safety issues need to be considered when traveling abroad. Please refer to the International Travel section within the Travel Policy. All Pre-Approvals for International Travel to countries designated on the restricted list will be routed by Chrome River to the International Vice President’s Office for approval in addition to the normal department approvals.

**Non-Allowable Travel Expenses**

Some expenses are the personal responsibility of the employee and are not reimbursable. The following list is not all inclusive but shows examples of such non-reimbursable expenses.

* Personal and family expenses
* Gifts and souvenirs
* Valet and room service charges
* Personal medical and dental expenses
* Personal reading material, recreation, and entertainment
* Travel insurance in excess of that already provided
* Costs incurred by traveler's failure to cancel transportation or hotel reservations
* Commuting between home and work
* Haircuts, newspapers, babysitting, shoeshines
* Parking and traffic citations
* Reimbursement or payment for frequent flyer benefits and reduced or free flight coupons issued by the airlines.

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