



# EPSCoR Traveling Guidelines/Checklist

U of I Employees

## Prior to Trip

- ☐ **Complete** and **send** the EPSCoR Travel Request Form. [Idaho EPSCoR Travel Request Form](#)
  - **Check** with your department to find out if any other travel approvals are required
- ☐ For **International Travel** you **MUST contact** the [International Programs Office](#)
  - TA and Export Controls Questionnaire must be approved/submitted in VandalWeb at least 30 days prior to trip to ensure adequate review time and approval from ORA.
  - Traveler to Review [Fly America Act](#) prior to purchasing airline tickets and purchase minimum compulsory insurance.
- ☐ **Approve** Trip Authorization in VandalWeb and follow up with your supervisor to make sure they approve.
- ☐ **Review** the General Travel Guidelines section of this guide to avoid any travel expenses becoming your personal responsibility.
- ☐ **Understand** that ultimately it is your responsibility, as a UI employee, to follow all UI policies and procedures. Find the travel procedures in the Administrative Procedures Manual, Chapter 70, <http://www.uidaho.edu/apm/70>.
- ☐ **Travel Advance:** Up to 90% may be requested 10 business days prior to travel

## General Travel Guidelines

- ☐ **General:**
  - Travel expenses are funded when they are EPSCoR business related, documented properly, most economical, grant allowable, and are within the event dates (one day prior and one day after allowed to travel to/from the event).
  - University purchasing cards are intended for university related expenses **ONLY**. No personal expenses are allowed to be charged on a university purchasing card.
  - Original receipts will be required so be sure to collect throughout your trip.
  - Be sure to provide comments and documentation for all nonstandard expenses
- ☐ **Personal Days** during trip:
  - **MUST be pre-approved** by your supervisor
  - When submitting the expense claim after completing such travel, the employee should document the date and time of the beginning and the ending of the included period of leave.
  - If a charge is a mix of business and personal purpose then be sure to pay for the expense personally and then request reimbursement for the business related part of the expense.
  - All expenses must be paid from traveler's personal funds.
  - Provide comparison expenses to ensure that the most economic and efficient mode of travel was used for UI business
- ☐ **Food You Purchased and Provided to Attendees at an EPSCoR Business Meeting:**
  - Provide original itemized receipts
  - Provide a list of attendees (MUST have at least five attendees)
  - Include the EPSCoR business purpose
  - Provide an agenda for the meeting (MUST be at least 3hrs for refreshments, or 6hrs for meals)
  - Reimbursement will be limited to the State of Idaho meal per diem rate per attendee



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☐ **Airfare:**

- Provide original itemized receipt that reflects traveler's name, date, amount, method of payment, ticket number, vendor name, destination and dates of travel
- Travel must be performed in the manner most advantageous and economical
- Upgrades or first class tickets will NOT be allowed
- Up to one baggage fee each way will be allowed
- Travel Insurance on domestic air travel is NOT allowed
- MUST follow the Fly America Act **if traveling internationally**. Contact Maria if you are traveling internationally to discuss.

☐ **Lodging:**

- Ask for the government rate when staying within Idaho, and ask for State of Idaho tax exempt status
  - Provide a detailed itemized receipt with a \$0 balance
  - Incidental expenses will need to be paid for with personal funds at check-out
  - Lodging the night before the start of a trip will be allowed as long as it is necessary for an early morning flight as long as the lodging is more than 50 miles from your workstation. No per diem will be allowed during this time.
  - If the room rate is more than a single occupant either:
    - A comparison will need to be provided showing single occupancy rate vs rate charged, and only the single occupancy rate will be reimbursed. **Do not charge to a university purchasing card.**
- OR
- List the other EPSCoR funded occupants sharing the room and provide explanation as to their function.

☐ **Personal Vehicle Mileage:**

- Private vehicle reimbursement rate is 53.5 cents per mile.
- Mileage will be reimbursed according to Mapquest routes. Be sure to provide your workstation address and ending location address. Provide odometer reading, if mileage computations are not easily determined.
- Provide original parking receipts. If using a coin-operated parking meter take a photo to use as the receipt.

☐ **Rental Car:**

- Traveler's department **MUST have the following on file:**
  - \*\* Traveler's completion certification for online defensive driving course
  - \*\* Vehicle use form
  - \*\* 3-year driver's record
- Provide original itemized receipts
- Only up to a midsize car rate will be allowed, unless the traveler has a documented business reason for a higher class automobile
- Provide original gas receipts and note the gas was for the rental car
- Provide original parking receipts. If using a coin-operated parking meter take a photo to use as the receipt.
- Only UI employees are allowed to be drivers
- Only UI employees or students are allowed to be passengers. Non-UI passengers are not covered by insurance
- **Use Enterprise Rental Car (Corporate Account: XZ47IDS Account Name: IDS).** Provide explanation for not using UI contracts.
- Waive the insurance coverage
- Sign the rental agreement in your name, followed by the initials UI
- Check with your department to be sure you have on file an Authorization to Travel form and be sure to carry a State of Idaho accident claim kit.

☐ **Conference Registration:**

- Provide the original conference registration receipt



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- ☐ Provide a conference agenda
- ☐ Per diem funding will not be provided for any meals that are included in the registration fee or provided at the conference
- ☐ **Public Transportation:**
  - ☐ Provide receipts. A photo taken with your cell phone substitutes a receipt when using parking meters. Tips are included with per diem.
  - ☐ If using a UI purchasing card you **MUST** provide original receipts. Do not include tip on PCard
  - ☐ Tips are part of per diem
- ☐ **Per Diem:**
  - ☐ You are eligible for per diem for meals that were not provided based on departure date/time and return date/time. Justification for requested per diem is required when meals are provided
  - ☐ Travel status starts at departure from work site if driving directly to event/airport. If traveler is getting a hotel for the night before departure travel status starts two hours before airplane departure time.
  - ☐ The in-state per diem rate is \$45/day and out-of-state is \$51/day. Other per diem rate will be figured based on federal regulations. In-state per diem applies to other states without overnight stay.
  - ☐ includes incidentals as follows: tips for taxis, airport shuttle services, baggage handlers, hotel services and meals, etc.
- ☐ **Internet** charges aboard planes or other locations are allowable when justification is provided and included on the Travel Authorization.
- ☐ **Laundry & Dry cleaning** expenses are allowable if travel exceeds 5 calendar days.
- ☐ **Missing Receipts:**
  - ☐ On personal funds: Traveler completes and signs a Lost or No Receipt Memo and collects supervisor's signature.
  - ☐ On Purchasing Card: Traveler contacts vendor for receipts. If receipt is not available from vendor, expense is moved to employee's A/R and a reimbursement to the employee is processed. Employee is then responsible to clear personal A/R account.

## After you return from your trip

- ☐ **Fill out** the [Idaho EPSCoR Travel Reimbursement Form](#)
- ☐ **Attach** ALL original receipts
- ☐ **Submit** ALL paperwork within one week of returning from your trip to:
  - ☐ Maria S. Horta Vorse  
MS 3029  
Morrill Hall Room 407
- ☐ **Expect** your travel claim to be processed within 1-2 weeks of the EPSCoR Office receiving your Travel Reimbursement Form
- ☐ **Be sure to promptly provide** additional needed information when asked so not to delay processing

**Questions?** Maria S. Horta Vorse 208-885-7102 [mariah@uidaho.edu](mailto:mariah@uidaho.edu)

**Don't forget to visit us at:** [www.idahoepscor.org](http://www.idahoepscor.org)