

## **9.01 Overview and General Guidelines**

Last Modified Date: 06/03/2010

### **9.01.01 State Policies Regarding Travel**

The University's Travel Policies and Procedures Manual is based on Section 5 of The State Budget Manual, which sets forth travel policies and regulations relative to securing authorization and reimbursement of expenditures for official state travel. The administration and control of travel is designed to comply with the provisions of G.S. 138-5, 138-6, and 138-7.

### **9.01.02 Responsibility of Traveler**

An employee traveling on official business is expected to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business and expending personal funds. Excess costs, circuitous routes, delays, or luxury accommodations and services that are unnecessary, unjustified, or for the convenience or personal preference of the employee in the performance of official state business are prohibited. Employees will be responsible for unauthorized costs and any additional expenses incurred for personal preference or convenience. Each traveler is responsible for his/her own expenses (both employees and non-employees). The University should not be billed for an individual's travel-related expenses.

### **9.01.03 Official State Business**

These policies are intended to apply only to those state employees or other persons on official state business. Official state business occurs when the State employee or other person is traveling to attend approved job related training, work on behalf of, officially represent, or provide a state service upon the State's request. Travel that would not directly benefit the State will not be reimbursable.

### **9.01.04 Ride Sharing**

It is the policy of the University to limit the number of vehicles for which mileage expense is to be incurred by the University to the minimum necessary to transport multiple business travelers to a common destination with reasonable regard for safety, comfort, and efficiency.

The precise number of vehicles that can be justified will vary according to type of vehicle available (e.g. van, sedan, station wagon); number of travelers; distance to be traveled; vicinity travel required at the destination; compatibility of travelers' departure and return schedules; and other pertinent variables. However, both the traveler and those who authorize the travel bear responsibility for assuring that the number of vehicles used and the consequent expenses incurred reflect observance of the University policy stated above.

When multiple passengers undertake approved business travel in a private vehicle, only one may claim reimbursement for mileage.

### **9.01.05 Penalties and Charges Resulting from Cancellations**

Penalties and charges resulting from the cancellation of travel reservations (including airline, hotel, or other reservations and conference registration) shall be the University's obligation if the employee's travel has been approved in advance and the cancellation or change is made at the direction of and/or for the convenience of the University. If the cancellation or change is made for the personal benefit of the employee, it shall be the employee's obligation to pay the penalties and charges. However, in the event of accidents, serious illness, or death within the employee's immediate family or other critical circumstances beyond the control of the employee, the University may pay the penalties and charges.

#### **9.01.06 Controller's Office – Travel Audit Section**

The Controller's Office is responsible for administering the University's Travel Policies and Procedures. The Travel Auditor reviews travel authorizations and reimbursement requests for completeness and conformance to the University travel regulations; prepares input documents for travel advances and reimbursements; maintains subsidiary records of travel advances; and prepares travel deposits for the Cashiers' Office.

The Travel Auditor is located in Room 323A, H. F. Robinson Administration Building.

#### **9.01.07 Forms**

All forms for travel are on the Controller's website at <http://www.wcu.edu/12382.asp> .

#### **9.01.08 Assistance**

Before travel expenditures are incurred, all travelers and administrative personnel should be aware of the travel policies and procedures stated in this manual. Please refer questions to Kay Benson, Travel Auditor, **Ext. 3104**.