Department of Applied Mathematics Travel & Travel Purchasing Guidelines

✈️ *created 1.1.26*

If you are familiar with all of the guidelines listed below, you may jump directly to the Quick Step by Step.

✈️ Travel Purchasing Guidelines

Use of University and Personal Cards during Travel

- Travel Cards: May be used for all travel expenses except airfare (e.g., hotel, meals, incidentals, ground transport, parking).
- Personal Cards: May be used for hotel, meals, incidentals, ground transport, and conference/event registration. Preferable for meals to simplify per diem reimbursement.
- Procurement Card (Pcard): Only allowed for conference/event registrations. **DO NOT use Procurement card for travel. You may only use your Travel card or Personal card when in travel status.**
- Not Allowed: Airfare cannot be purchased with Travel or Personal Cards.

Guidelines for Card Usage During University Travel

Expense Type	**Travel Card**	**Personal Card**	**Procurement Card (P-Card)**
Airfare	Not Allowed	Not Allowed	Not Allowed
Hotel/Accommodations	Allowed	Allowed	Not Allowed
Meals	Allowed (but per diem preferred)	Allowed (preferred for per diem)	Not Allowed
Incidentals	Allowed	Allowed	Not Allowed
Ground Transportation	Allowed	Allowed	Not Allowed
Parking	Allowed	Allowed	Not Allowed
Conference/Event Registration	Allowed	Allowed	Allowed (preferred method)

*Itemized receipts showing your name and proof of payment are required for all transactions except meals reimbursed by per diem.

✈️ Travel Guidelines

Pre-Travel Authorization/Notification

1. Approval: International Approval is required through Concur; Domestic Travel Notification is required through the Department via webform.
    - International Travel Approval will go through Concur and will automatically route to the Chair for approval. https://www.cu.edu/psc/travel/you-travel/travel-pre-approvals
    - Domestic Travel: You must notify the department of your domestic travel plans via this domestic travel notification form. https://www.colorado.edu/amath/faculty-domestic-travel-notification-form
2. Grant Approval: If you are travelling on a grant, you must ensure that your grant allows for the travel. If this will be charged to a grant and you are not the Principal Investigator (PI) on the grant, attach written PI approval.
3. Justification: Provide a business justification for your travel, clearly stating the business purpose and how it benefits the grant and/or the university.
4. CU Travel Guidelines: Note that CU has leave restrictions for faculty: https://www.colorado.edu/asfacultystaff/personnel/policies-procedures/sabbatical-leave-fellowship/leave; Faculty Affairs Link: https://www.colorado.edu/facultyaffairs/faculty-personnel-actions-career-milestones/leaves-sabbaticals
    - If you will be gone for more than five contiguous working days and less than 10 working days, you will need chair approval.
    - If you will be gone more than 10 working days or more in one semester due to travel, you must get written approval from both the chair and the dean.

Booking Airfare

- All airfare must be booked through Concur or Christopherson Business Travel (CBT). Here's a link to creating a Concur Profile: https://pschelp.cu.edu/s/article/Concur-General-Completing-Your-Profile;
- Do not purchase airfare through internet sites; such purchases will not be reimbursed. If you find airfare that is cheaper than what is on Concur, you will need to get a comparison quote that is lower than what is on Concur/Christopherson BEFORE purchasing the airfare on your personal card. If you purchase personally without this quote, the purchase will not be reimbursed.

- If combining personal and business travel, obtain a comparison quote from Christopherson upfront. You may not be reimbursed for the trip if there is personal travel included without a quote up front.
- Seat upgrades will only be reimbursed during foreign business travel with greater than an 8 hour continuous flight time.

Lodging

- Lodging can be booked through Concur directly, or you can book via your Travel or Personal card.
- Avoid travel sites like hotels.com or booking.com; they usually do not provide itemized receipts, which are required for reimbursement.
- Obtain an itemized receipt that shows base rates, taxes, your name, and proof of payment.
- If you share lodging with someone else, you must pay separately with separate receipts.
- CU will not pay for any room service charges or other incidentals at the hotel. If you do plan to incur any charges other than the room and associated room fees, you should pay on your personal card and only request reimbursement for the lodging charges.

Ground Transport

- Use preferred rental agencies: Avis, Budget, National, Enterprise, Hertz, preferably through Concur.
- Obtain itemized receipts for all rental car, gas, and rideshare expenses. Rideshare tips above 20% must be reimbursed to the University.
- Keep receipts for all public transportation.
- For mileage reimbursement, document start/end addresses and business purpose. Commuting miles will be subtracted.
- Documentation is required for all expenses, regardless of amount.

Meals

- Reimbursement for meals is based on per diem rates; no receipts required for per diem.
- Do not use Travel Card for meals to simplify per diem reimbursement.
- Meals provided by conference hosts cannot be reimbursed; if you attend a conference where meals are offered (as part of the conference fee), that will be subtracted from the per diem rate.
- Travel days will only be reimbursed at 75% of per diem.

- No alcohol will be reimbursed.

Combining Personal and Business Travel

- Use Christopherson for booking when traveling with family or adding personal days. This ensures proper allocation to university and personal funds.
- Provide a comparison quote for University compliance. Christopherson will provide a free comparison quote.
- Upon return, detail which days were personal for accurate expense allocation.

Sabbatical

- Travel undertaken for university business while on sabbatical is subject to sabbatical travel guidance. The faculty member's sabbatical plan MUST identify the specific university-business travel in advance for travel expenses to be allowable. Faculty Sabbatical Expenses at CU Boulder.
- Non-reimbursable expenses include: General personal living expenses; per diem payments; any costs that appear to confer a private benefit.
- Include all items you wish to be reimbursed for related to that trip (Lodging, Uber, parking, tolls, mileage, etc.).

Reimbursement Process

1. As soon as possible after travel, submit your travel information and expenses via email to am_accnt@colorado.edu. Please include all documentation and provide your business purpose, travel dates, speedtype and other required info.
2. Include all items you wish to be reimbursed for related to that trip (Lodging, Uber, parking, tolls, mileage, etc.).
3. IRS tax withholding applies for charges older than 90 days. This 90 days is counted upon final University approvals, not when you submit to APPM Accounting. So, please submit within 30 days of your travel.

Quick Step by Step:

1. Complete a Travel Pre-Approval/Notification:
    a. International Approval Link
    b. Domestic Notificaiton Link
2. Book your Trip! Flights through Concur (link); DO NOT PAY FOR INTERNET AIRFARE WITHOUT AN EXCEPTION; Lodging through Concur or with Personal or Travel Card; Ground Transportation through Personal or Travel Card; Meals with a Personal Card and we will reimburse you per diem.

3. When you return – within 30 days or ASAP, submit all your travel expenses to am_accnt@colorado.edu. The Accounting Team will process your report and you will be required to sign off on it once it's completed in Concur. After all final approvals, any funds due to you will be received via Direct Deposit.

CU Guidelines & Helpful Resources:

CU Travel Guidelines: https://www.cu.edu/psc/travel

PSC Travel Guidelines: https://www.cu.edu/psc-procedural-statement-travel

OCG Travel on Sponsored Projects Guidance:
https://www.colorado.edu/ocg/manage-awards/travel-expenditures-sponsored-projects

Fly America Guidelines on Sponsored Projects:
https://www.colorado.edu/ocg/fly_america_act

Christopherson Business Travel: Email – cutravel@cbtravel.com; Toll Free: 1.855.462.8885; Local: 303.694.8744

Disclaimer: All purchasing and travel activities must comply with University of Colorado Boulder policies, Office of Contracts and Grants Guidelines, and applicable federal regulations. Submit proper documentation for all expenditures, regardless of amount. These guidelines may change based on University guidance.

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Update log

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