Travel & Travel Card Policies, Procedures & Resources for Department of Ethnic Studies (DES) Faculty, Staff & Students

All university funded travel expenditures must be justifiable for research or teaching purposes, or to conduct official university or departmental business. The university’s managed travel program is designed to meet the travel needs of all individuals (faculty, students, staff) who travel on official university business. Many of the following requirements are state and university policies; they are not set by this department.

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Department & University Travel Resources

If you are unsure about whether your intended travel plans or expenses are allowable or feasible within university policy, please consult the following resources for clarification prior to making travel arrangements:

- Review the university Procurement Service Center’s [Procedural Statement on Travel](#).
- Contact the DES Program Assistant (DES PA) Virginia.Kester-Meyer@colorado.edu.
- Contact FinProHelp@colorado.edu for fast and effective email Q&A. FinPro staff can answer most university fiscal policy questions.
- Contact the university’s Travel Manager, Shannon Miller, at Shannon.Miller@cu.edu.
- Contact our Financial Service Center Technician, Robin.Bowersock@colorado.edu

International Travel requires further planning and is subject to additional policies and procedures. Please review the following resources prior to making international travel arrangements:

- [Procurement Service Center](#) documentation (primarily purchasing policies)
- [University Risk Management](#) documentation (primarily insurance, medical, and safety policies & considerations) as well as a list of Boulder Campus contact information.
Travel Authorization

**Pre-approval is required** prior to all official university business travel conducted at any time of year.

If you will be traveling (domestic or international) during the academic year for business related purposes, even if your travel will not be university funded, you must still obtain department approval following the pre-approval for domestic travel instructions, below. This is a requirement of the College of Arts & Sciences and is necessary so that the department is aware of cancelled classes or coverage plans for classes during your time of absence.

**Department Pre-Approval for Domestic & International University Business Travel**

Department travel authorization requests should be submitted at least 2 weeks in advance of your trip, before you make any travel related purchases.

**How to Request DES Travel Authorization**
- Download and complete the DES Travel/Leave Form [from the DES Faculty Resources](#) website.
- Submit your completed PDF form electronically for approval and filing. Submit via email to the DES PA for routing through DocuSign, or submit directly via DocuSign yourself with the following recipients:
  - 1. You: role = needs to sign (include sign & date fields)
  - 2. Department Chair: role = needs to sign (include sign & date fields)
  - 3. DES PA: role = receives a copy
- The Program Assistant will file a copy of the signed authorization in department files.
- This form will be used in reconciling travel expenditures once the trip has been completed.

Please note: *Trips taken prior to approval cannot be reimbursed.*

**University Pre-Approval for International Business Travel**

International travel pre-approval is required in addition to the DES travel authorization form. It is processed online through the [Concur Travel & Expense System](#) (Concur).

**How to Request International Travel Authorization in Concur**
- To access Concur, log in to [http://mycuinfo.colorado.edu/](http://mycuinfo.colorado.edu/). On the CU Resources tab, select Business Applications and then select Concur.
- Request pre-approval for international travel by [following the process detailed here](#).
- FAQs on navigating the university’s international travel policies are available here.
- For additional information, please see [Book International Airfare...](#) below.

Your travel must be approved in Concur before you can book an international flight. Once the pre-approval request is fully approved, Concur will send an email notification to Christopherson Business Travel (CBT) and to the traveler.
**Booking Travel**

The university requires that all university funded airline tickets be purchased following the [PSC Travel Procedures](#). Tickets can be booked via the [Concur online booking tool](#), or through the university travel agent, Christopherson Business Travel (CBT). Please note that any booking (domestic or international) made by CBT on your behalf will incur an automatic $20 service fee which will be charged to your SpeedType in addition to the cost of your airfare.

Once your airfare is booked through Concur or CBT, an email confirmation is automatically sent to the DES PA. If there is not a pre-approved DES travel authorization on file and/or if there are not sufficient funds in your SpeedType(s), the tickets may be cancelled by the DES PA at that time.

*Any airfare purchased outside of Concur is considered Internet Airfare and will only be reimbursed if the purchase has been made in compliance with the policies detailed below under Internet Airfare.*

If you are planning a business trip for which you plan to drive (mileage) instead of fly (airfare), there are important policies and procedures that you must comply with prior to embarking on your trip. Please refer to [Mileage vs. Airfare](#) under [Mileage Reimbursement](#), below.

**Book Domestic Airfare via Concur**

Use Concur to purchase all university funded *domestic* flights (international flights cannot be purchased via Concur). Concur purchases are charged directly to a faculty SpeedType, with no out of pocket cost to you. You may also book domestic flights through CBT (see CBT booking instructions below), but your SpeedType will be charged a $20 service fee for every booking made by CBT on your behalf.

- Before you can complete your purchase, you’ll need to enter the SpeedType that your airfare should be charged to. Please make sure you have that # handy before you begin your search.
- Log into Concur via [http://mycuinfo.colorado.edu/](http://mycuinfo.colorado.edu/). Select the CU Resources tab and click the Concur Travel & Expense System tile.
- Use Concur to price, select, and purchase your airline tickets, just as you would do in most online airfare sites.
- Still unsure? Review this 2.5 minute video on [how to book university sponsored travel in Concur](#).

**Book International (or Domestic) Airfare via Christopherson Business Travel**

International airfare must be purchased through Christopherson Business Travel (CBT). CBT cannot book an international flight for you until they have received your corresponding [international travel authorization](#). CBT will be automatically be notified once your international travel authorization has been approved.

[Contact CBT via phone or email](#) to book your airfare. Email requests should include the following information:

- Departing city and/or airport
- Destination city and/or airport
- Preferred travel dates & timeframes
- Available budget (if applicable)
- Your faculty SpeedType, to which they will charge the flight directly
- Remember that any booking (domestic or international) made by CBT on your behalf will incur an automatic $20 service fee charged to your SpeedType in addition to the cost of the airfare that you select.
Internet Airfare

All flights purchased outside of Concur or CBT are categorized as Internet Airfare. Before purchasing Internet Airfare, you must ensure that your purchase will be in compliance with the [PSC Internet Airfare purchasing procedures](#) detailed below.

*Internet Airfare purchases must be made using a personal card.* Internet Airfare cannot be purchased with University Travel or Procurement Cards.

Reimbursements for Internet Airfare can only be processed after the travel has concluded. Any Internet Airfare purchases that are not in compliance with university policy will not be reimbursed.

If you have any questions or doubts about whether your intended purchase is compliant, please consult the [Department & University Travel Resources](#) provided above.

### Internet Airfare Purchasing Procedures

- Do not purchase Internet Airfare until you are sure that your purchase will be in compliance with university policy.

- *Prior to making an internet airfare purchase,* you must obtain a comparison quote from Concur (for domestic flights) or Christopherson Business Travel (for international flights).

- The total cost of the internet airfare purchase must be less than the total cost of the Concur/CBT comparison quote. A compliant comparison quote must also be for the same routing, dates, and general flight times (within approx. one hour) as the internet airfare that you purchase.

- Save a complete copy of the comparison quote report that shows the date that the quote was obtained and demonstrates compliance with all of the parameters detailed above.

- A completed copy of the comparison quote report must be submitted with your receipts when you seek reimbursement after returning from your trip. **Failure to obtain and submit a complete and compliant Concur quote will result in non-reimbursement for your airfare.**
Common Travel Expenses

Please note that this is not an exhaustive list of reimbursable expenses or the associated policies and procedures. Please refer to the Procurement Service Center Procedural Statement: Travel for additional information on business travel expenses, policies, and procedures.

All travel expenses paid for or reimbursed with university funds must be documented with receipts as described below under Travel Expense Reporting and Reconciliation.

Baggage Fees

Baggage Fees are allowable if bags are required for official university business; valid business purpose must be noted in the additional comments field of the Travel Expense Reimbursement form. The FSC will not reimburse heavy or additional baggage fees without department approval. Tips on curb-side baggage check-in are included in the Incidental Expenses Per Diem amount and cannot be claimed separately.

Car Rental

University rental car information is available at https://www.cu.edu/psc/travel/rent-a-car.

If you would like to rent a car for your business travel, it is recommended that you make the booking via Concur so that you benefit from university pricing deals and insurance options. For the most part, the rental prices you see in Concur include all incidentals, though there may be some additional “on-the-ground-fees” specific to the rental location.

Whether or not they are booked through Concur, rental car reservations for employees & students should be made by the traveler through a university approved vendor. Booking rentals using the university’s negotiated agreements allows you to utilize special rates, insurance, and should a rental related dispute arise, the university’s Travel Manager, Shannon Miller, can help to negotiate and resolve it. If you do not book the rental under one of the university’s negotiated contract codes, you will be solely liable for any problems that arise with your rental.

Booking a Car Rental with Concur

Current employees traveling on university sponsored business should make rental car bookings via Concur, so that university contracts are automatically applied. Those employees with a Travel Card who will be using university funds to pay for the rental should use their Travel Card to make the booking. Bookings made through Concur with a Travel Card will automatically have all insurance included.

Concur bookings require entry of payment information. If the travel is for university business but the traveler does not have a Travel Card or will not be seeking reimbursement from the university, they must use their own personal form of payment.

Booking a Car Rental without Concur

Individuals without Concur access (primarily graduate students without university employment over the summer months) can book their rental directly through an approved vendor using the university discount codes. A list of university supported rental agencies and the corresponding university discount codes is available here on the PSC website under Agreements.
Lodging
Refer to the Lodging section of the Procurement Service Center Procedural Statement: Travel.

Mileage Reimbursement
If you would like to seek reimbursement for mileage costs associated with university sponsored travel, please consult the policy information detailed in the PSC Procedural Statement: Travel under Mileage.

Allowable miles are those driven in excess of the normal round-trip commute to primary work location—regardless of type of transportation used for normal commute; see mileage calculation guidelines. Mileage is calculated by the Financial Service Center based on the route taken and days travelled, so please be sure to include those details in your reimbursement documentation submission.

Mileage vs. Airfare
If you would like to drive (mileage) instead of fly (airfare) for your university funded travel, you must first consult the policy information detailed in the PSC Procedural Statement: Travel under Mileage. This option is allowable in some circumstances, but parameters vary depending on the circumstances.

To help limit unexpected complications during reimbursement, please get a comparison flight quote from Concur prior to your trip that shows the cost of mileage reimbursement will be cheaper than the cost of airfare for the same route/dates. This quote is only required for some mileage vs. airfare reimbursements, but if you have a compliant quote, you should be covered if university officials express any doubt regarding the validity of your choice of mileage over airfare.

Parking
Reimbursement for parking is allowable when it is a necessary part of the trip, including parking at traveler’s destination, parking at the airport. Travel Card holders should use their travel card. Parking expense documentation (receipts) must include the information detailed below under Travel Expense Reporting and Reconciliation.

Per Diem (Meals & Incidentals)
Meals & Incidentals (M&IE) per diem rates are determined based on your dates of travel and the city you are traveling to. Receipts are not required for meals/per diem and should not be purchased with a Travel Card. Tips on curb-side baggage check-in are included in the Incidental Expenses Per Diem amount and cannot be claimed separately.

Per diem is paid at a percentage on travel days, and full during conference days. Rates can be found here, just search for the city/state or zip code you will be travelling to, click on find rates and scroll down to Meals & Incidentals (M&IE).

If you are travelling to attend a conference, you will be required to submit your conference registration and agenda when you submit your Travel Reimbursement Request materials to the Program Assistant. If meals are included in conference fees, per diem rates will be pro-rated based on the meals provided. The agenda is used to calculate this.

Please include the specific dates that you wish to receive per diem on your Travel Reimbursement form. See below for additional information.
Personal Travel Combined with Business Travel

When traveling for university business, it is allowable to combine your business trip with personal travel. The university will only pay for the business portion of your trip, and expenses for the personal portion must be excluded on your expense report.

You must first obtain approval from your department and then follow the purchasing and documentation guidelines listed here.

A few highlights from the policy:

- You’ll need a comparison quote from Concur (domestic) or CBT (international) to document the cost of the business-only fare. This quote will need to be submitted with your Travel Reconciliation documentation.
- Compare the cost of the combined trip airfare with the cost of the business-only airfare. If the extended trip results in a higher cost, you need to reimburse the university the difference in airfare as soon as possible after the purchase occurs.
- Be sure to include a comment on the expense report header to indicate the trip is a combination of business and personal travel – and note which days are personal.

Shared Costs

If you intend to share travel costs with another individual (including other CU employees), please refer to the Shared Costs section of the Procurement Service Center Procedural Statement: Travel for information about policies and procedures.

Tax Implications

Expense reports and all supporting documentation must be submitted to the traveler’s approver within designated time period to avoid having employee reimbursement reported as income. See PPS Business Expense Reimbursement. All Travel Card & expense reimbursement documentation should be submitted to the university within a week of returning from travel so that expenses can be processed by the FSC well before any income tax implications are incurred.
University Travel Cards

The University Travel Card is a tax-exempt, corporate liability card that is used by the cardholder to pay for many of their university travel-related expenses while they are in travel status (rather than paying out of pocket and seeking reimbursement after the trip has concluded).

The university is liable for charges incurred on the card and pays the bill directly to US Bank, but cardholders will be required to reimburse the university for any prohibited expenses they incur on their Travel Card. Cardholders who do not adhere to university and department procurement policies will have their card revoked.

Faculty may apply for a Travel Card in their name, but they are not required to do so. If you would like to apply for a Travel Card, email the DES PA to request information about the training requirements and Travel Card application. The process is similar to requesting a Procurement Card but requires some additional training.

The DES PA will facilitate the training and administrative support necessary for new cardholders to gain Travel Card policy and procedural proficiency. If you need assistance navigating the university travel nuances and niches at any time, please refer to the support resources provided above.

Travel Cardholders are responsible for knowing and adhering to university procurement policies and procedures with relative independence.

Cardholders are responsible for completing their own travel reimbursement & reconciliation documentation as detailed here.

Cardholders who will be traveling overseas should notify US Bank to ensure that the card will not be declined. Foreign currency transactions will incur a conversion fee.

The Travel Card provides limited, secondary insurance coverage for rental cars when certain terms and conditions are met. (For questions on this coverage, contact 1.800.VISA.911.) Furthermore, the card facilitates reconciliation of university business trips by consolidating trip expenses on a single expense report for review, approval, and import into the university’s Finance System.

Lost or stolen Travel Cards must be immediately reported by the cardholder to US bank at 1.800.344.5696 (outside U.S., call collect 1.701.461.2010).

Here are some examples of permitted and prohibited Travel Card purchases. This is not an exhaustive list.

Examples of Permitted Travel Card Purchases
- They should be used to cover the individual cardholder’s lodging, vehicle rentals (including gas), and ground transportation while the cardholder is in travel status.
- They can also be used to pay for conference registrations that will require travel. This is the only allowable Travel Card expense that can be paid prior to travel.

Examples of Prohibited Travel Card Purchases
- The Travel Card cannot be used to purchase airfare, including Internet Airfare.
- Travel cards cannot be used to pay for your meals. If you would like to use university funds to pay for meals, you must pay for those expenses out of pocket, and then request reimbursement for Meals & Incidentals (M&IE) per diem after your trip is concluded.

If you are unsure whether a purchase is allowable, please review the Travel Card Handbook and refer to the university travel resources provided above to resolve your uncertainty, before making the purchase.

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Travel Expense Reporting and Reconciliation

All university business travel reimbursement documentation should be submitted within a week of the end of your trip. If you would like to seek reimbursement for allowable travel expenses paid with a Travel Card or a personal form of payment, please follow these procedures:

**Ensure that you have sufficient research funds available to cover the expense(s) that you are seeking reimbursement for.**
- To request a SpeedType balance or verify a SpeedType #, please send an email request to the DES PA prior to submitting your reimbursement request.

**Scan or save a PDF copy of all associated receipt(s).** Each of your receipts must include:
- Itemization of all costs included in receipt totals.
- Total amount paid for each expense.
- Confirmation-proof of payment.
- If the name of the payor is included on the receipt, only the person named can be reimbursed. If others are named, contact DES PA for guidance on non-employee reimbursement policies/processes.

**Download a Travel Reimbursement Request Form from the Financial Service Center website.** Fill it out to the best of your ability. Please be sure to include the following details:
- Traveler name, email, dates and destination of travel.
- Conference title if applicable.
- All expenses that you are seeking reimbursement for (a receipt must be submitted for every expense, except for meals, which are reimbursed at a flat rate).
- If you would like to be reimbursed for full M&IE per diem, select that option in the form. If you would like only partial per diem, please use the “if no” line and the additional comments section to provide the specific dates and meals (if not seeking the full per diem available for you for each date) that you wish to receive per diem for. You do not need to know or enter the total cost associated with the per diem you are seeking, but you should be aware of the ballpark cost (using this tool) so that you know whether you have the necessary funds available. If you are unsure, make a note in the Additional Comments section (or your email to the DES PA) that you’d like to receive all per diem you are eligible for, up to a $X amount (whatever your available funds are).
- Include the SpeedType #(s) that reimbursement will be paid from. Reimbursements can be split across multiple SpeedTypes if necessary, but you must be specific about the amount you would like to be charged to each SpeedType that you have listed.
- Business purpose (please thoroughly describe the legitimate business need that necessitated the purchase).
- The total expenses field is automatically calculated from individual expenses, do not enter anything there.
- Only enter a maximum reimbursement amount if your available budget is less than the total expenses demonstrated in your documentation.
- Note any complexities related to your expenses in the additional comments field.

Submit the completed FSC form, all receipts and related documentation together in a single email to the DES PA. The DES PA will review and once any questions have been resolved, will submit to the Financial Service Center.

Once you have become fluent in the travel reimbursement paperwork & policies, then the DES PA will ask you to begin submitting directly to our Financial Service Center Technician (Robin.Bowersock@colorado.edu) via email, cc’ing the DES PA on your submission.

Our FSC Tech will process and enter in Concur and submit back to you for approval (you’ll receive a notification about this via email). You’ll be cc’ed when the request is submitted, so that you can field any questions about the expenses that the FSC may have.
Additional Notes on Travel Expenses & Reconciliation

• If you have a guest in your room, you will need to show proof the room was not charged at a higher rate for a guest. Your reimbursement will be offset by the amount charged for that additional person. If this was paid for on your Travel Card, you will be asked to reimburse this amount to the university.

• You will also be required to submit any receipts for transportation, fuel, toll, or baggage fees if you charged these on the Travel Card or are requesting a reimbursement for such items.

• Special policies must be adhered to regarding additional or heavy baggage fees and airfare upgrades. Please consult the University & Department Travel Resources for guidance.

• If you have any questions on travel procedures, please contact the DES PA, as they are your official department travel liaison.

• PLEASE NOTE: Most university published travel resources and trainings are designed for broad audiences, including those who do not have the benefit of a Financial Service Center, as we do. Please keep this in mind if you encounter instructions in university publications that don’t fully correspond with the procedures described in this document. If you encounter such inconsistencies, please contact the DES PA for clarification.

• Please do not create your own expense reports in Concur under any circumstances. Concur expense reports must be entered by the Financial Service Center staff from the completed Travel Reimbursement Request Form submitted to them via email. This is their responsibility and is necessary for compliance with university fiscal policy.

• Some faculty have received training to upload their receipts directly to Concur. Those faculty still must submit their completed Travel Reimbursement Request Form via email for the FSC’s expense reporting purposes. If you would like to be trained on this process, please contact the DES PA for information.