



**I. 6.2.9 Authorization to Travel for Employees, Students, and Residents**

Chapter 6 - Fiscal	Original Effective Date: May 2000
Section: 6.2 Travel Policies and Procedures	Date Last Reviewed: October 2013
Responsible Entity: Assistant Vice President for Business Affairs	Date Last Revised: October 2013

**II. Purpose**

To establish the guidelines and procedure for requesting authorization to travel in a manner that ensures safety and supports UT Health San Antonio's objectives.

**III. Scope**

This policy applies to faculty, staff, interns, students and residents for all travel on UT Health San Antonio time or business away from the individual's headquarters city.

**IV. Policy**

Authorization is required in advance for travel from the city or town where the employee is regularly stationed while on UT Health San Antonio (UTHSA) time or business regardless of whether reimbursement is expected. Authorization is typically handled using a PeopleSoft travel requisition or a PeopleSoft Blanket Travel Authorization, but may be given using another suitable method. The Blanket Travel Authorization mechanism is used to authorize official travel within the state of Texas that does not require purchase of a public transportation fare (e.g., air, train, bus). Any other UTHSA travel requires a travel requisition. Approval to travel should be given by the supervisor or department head of the individual traveler, or by his or her designee. A subordinate of the traveler is not a sufficient approver. Personal travel using vacation leave for the entire trip does not require departmental approval.

Departments must complete a PeopleSoft travel requisition for faculty, staff, interns, students, and residents for all travel on UTHSA time or business away from the individual's headquarters city. Intra-city travel or intra-state travel does not require a PeopleSoft travel requisition unless it requires purchase of a fare for public transportation. A PeopleSoft travel requisition must be completed for periods of time away from the duty point in travel status during an employee's normal working hours even if there is no travel expense to the UTHSA. Detailed information requirements follow.

**A. Documentation Required**

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1. Create Requisition Defaults Panel:
  - a. Requisition Name: short description of the business trip
  - b. Select Requisition Type: Travel
  - c. Specify Travel Type (Foreign, In-State or Out-of-State)
  - d. Vendor ID number: Traveler's PeopleSoft vendor ID number.
  - e. Contact Information: Name and phone number of person to be contacted if there are any questions about the travel requisition.
  - f. Project: Source of funds used to pay for expenditures. Only one Project ID may be used per requisition.
  - g. Due Date: Traveler's last day of travel.
2. Add Items and Services Panel:
  - a. Long Description: Basic description of the expense to be reimbursed.
  - b. Price: Include the estimated amount of each expenditure line.
  - c. Additional Information: optional description of the cost to be reimbursed
  - d. Add items for each of the following types of travel costs
    - i. Public Transportation: Estimate for taxi, train, subway, bus, rental car, and airfare. Use The UTHSA of Texas System contracted rental car rates, unless the contracted agencies cannot provide the needed type of vehicle at the date and place needed. Use U.T. System contracted travel agencies to arrange airfare. Travelers are expected to use the lowest coach airfare for which they qualify. Additional guidance regarding procurement of airfares and rental cars is given on the Travel Services section of the Health Science Center Purchasing Office web site.
    - ii. Mileage: Estimate for personal car mileage.
    - iii. Per Diem for Days: List the number of days paid for by department. Lodging is not estimated for the last day of the meeting. The estimate for meals and lodging is based on allowable expenses for the destination and account used as follows:
      - (1) Out-of-state destinations: Meals and lodging not to exceed rates based on city/state destination for State funds & Federal/State Grant fund groups (14XXX, 15XXX, 21001, 4100X-43XXX, 23055, 23056, 23065, 23066, 23070 and 44087-44099).
      - (2) In-State destinations: Lodging not to exceed \$80 and meals not to exceed \$30 for meals for State funds & Federal/State grant fund groups (14XXX, 15XXX, 21001, 4100X-43XXX, 23055, 23056, 23065, 23066, 23070 and 44087-44099).
      - (3) All destinations: Actual meal & lodging cost for designated MSRDP/DSRDP funds (221XX and 222XX).

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- (4) All destinations (except foreign travel) – Meals and lodging combined not to exceed \$180 a day for private grants & non-State, non-Federal fund groups (44080-44086, 48XXX, 35001, 230XX – except 23055, 23056, 23065, 23066, 23070 and 44087-44099).
    - (5) Foreign travel other than Canada & Mexico – Actual expenses for meals and lodging for all fund groups except State funds (14XXX, 15XXX, 23055, 23056, 23065, 23066, and 23070).
  - iv. Other Allowable Expenses: Estimate for cost of books, videos, tapes, passport fees, fax charges, and other miscellaneous costs.
3. Review and Submit Panel: Click on airplane icon  for Travel Plans.
  - a. Disposition of Work While Away: Name of person who will cover traveler’s job duties. If appropriate, use ‘In Abeyance’.
  - b. Honorarium Received: Check if an honorarium or consultant fee will be received. Complete and submit a Request For Approval Of External Employment, Consulting, Board Membership, Or Related Activities.
  - c. Send REQ to Travel Agency: Check if the requisition should be transmitted to a contract travel agency. Note: If this box is not checked, the requisition will not be transmitted to the travel agency.
  - d. UTHSA paid travel (UPT) airfare: If UPT will be used, indicate the estimated amount of the airfare.
  - e. Travel Agency: Select a travel agency if you have flagged the Send REQ to Travel Agency field.
  - f. Prepaid registration fee: Amount of any prepaid registration fees paid via a Local/State Voucher.
  - g. Prepaid room deposit: Amount of any prepaid room deposit paid via a Local/State Voucher.
  - h. Country/City/State: Destination country, city and state for trip.
  - i. Start/End Date: First and last date of the trip. If the dates will cover travel within Texas for the year, then the Health Science Center fiscal year should be used for non-expiring accounts (September 1 – August 31). If the account is a grant, then use the starting and ending time for that grant. Dates are limited to one year at a time. Authorizations that cover more than one absence from headquarters and cover 12-month time period are called “blanket” authorizations; estimate for all potential travel costs. A “blanket” authorization cannot be used for UPT airfare or travel advances.
  - j. Type: Indicate whether the portion of trip is B for business or P for personal.
  - k. Purpose/Benefit:
    - i. List the specific name of meeting, conference, or other business.
    - ii. Describe the specific benefit to the department, the UTHSA, and/or grant. (Example: Obtained information that will aid the employee in the discharge

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of teaching, patient care, research, or administrative responsibilities). A benefit to a grant must be specific to the research of that particular study.

- iii. Acceptable reasons for travel are: to benefit the department and the Health Science Center, to benefit the purpose of a grant or contract, to present original research; and/or to recruit faculty or other employees.

4. Save and Preview Approvals (creates the requisition number):
  - a. Budget check
  - b. Select approvers

The approvals required for the PeopleSoft travel requisition will be established by the Access Control Executive (ACE) within each department. The two types of PeopleSoft approver roles are Administrator and Project Manager. The Project Manager is the authorized signature for the requisition, while the Administrator is considered to be a reviewer. Both must approve a requisition before it can be processed. If the requisition involves Foreign Travel, the requisition will automatically be routed to the requisition to the Vice President and Chief Financial Officer for institutional approval. The Vice President and Chief Financial Officer, or his or her designee must approve all foreign travel.

### B. Revised Travel Requisition

A revised PeopleSoft travel requisition must be prepared for the following:

1. change in dates;
2. change in destinations, or\
3. change in purpose or benefit.

## V. Definitions

*There are no defined terms used in this Policy.*

## VI. Related References

*There are no related documents associated with this Policy.*

## VII. Review and Approval History

The approving authority of this policy is the University Executive Committee.

Effective Date	Action Taken	Approved By	Approved Date
05/2000	Policy Origination		
10/2013	Policy Revision		