

Travel Guide

**Colorado State University
Department of History**

2019-2020

August 28, 2019 Version

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GETTING STARTED

Colorado State University Travel Guidelines and forms are available at <http://busfin.colostate.edu/Depts/TravelSvc.aspx>.

This History Department Travel Guide is a brief overview of the process, forms and procedures for travel. Please use these guidelines for department faculty, staff, students, and guests.

Why Travel Approval is Required?

For a traveler to have University insurance coverage while travelling, a prior approved Travel Authorization (TA) must be in place before travel begins. The TA should be in place for insurance coverage even if the department is not reimbursing expenses.

STEP ONE

Colorado State University TEM Customer Form

TEM is the abbreviation for Travel, Entertainment and Moving. Colorado State University requires a TEM Customer Form for each university traveler, including guests. The TEM Customer Form is used to create a traveler identity profile. The form is also needed for insurance and expense reimbursement purposes.

Upon arrival in the History Department, each new faculty and graduate student will receive a request from the department Travel Arranger (Sharon Van Gorder) to complete a TEM Customer Form. The information on the TEM Customer Form is kept confidential.

When a candidate interviews for a faculty position, they complete a non-employee TEM Customer Form for related travel. Upon hire with the University, the new faculty member will complete a new TEM Customer Form as an employee.

When guests are invited to the department, the person coordinating the guest visit should email the department chair (Dr. Robert Gudmestad) the following information: Guest name, guest contact information, dates and purpose of visit, and request for his approval. The department chair will reply via email and cc the Travel Arranger and the Fiscal Officer. Once the Travel Arranger receives the approval, she will contact the guest to request completion of a TEM Customer Form.

STEP TWO

Graduate Students:

When a graduate student plans to travel, they will need to apply for History Department travel funds. Their written summary of the planned travel is the “application”. The application is submitted to the Graduate Committee chair for review. Dr. Debbie Yalen is the Graduate Committee chair for the 2019-2020 AY.

The Graduate Committee will review the application and email their decision to the graduate student, the Travel Arranger (Sharon Van Gorder) and the Fiscal Officer (Nancy Rehe). Graduate student travel funds may cover mileage, airfare, lodging, registration, parking, and Lyft/Uber expenses. Graduate student funding does not include meal reimbursement.

Upon receipt of the Graduate Committee application approval, the Travel Arranger will work with the graduate student to create their required Travel Authorization.

Faculty:

Each fiscal year the department chair sets the amount of professional development funds available for tenured, tenure track and non-tenure track faculty. First-year tenure track faculty receive an increased amount of professional development funds- 50% for their first three years, per department policy.

Faculty may elect to use their professional development funds for travel. Travel funds may also be available through 64 accounts and 53 research funded projects.

For All Travelers:

Travelers are asked to complete and email the appropriate Travel Request Form to the Travel Arranger. If there are special circumstances or questions, please feel free to email or stop by to discuss your travel. Travel Requests Form are available on the N Drive. The Travel Arranger will contact the individual should additional information be needed.

Travelers must be signed up for Duo Authentication through ACNS <https://www.acns.colostate.edu/duo/> in order to be reimbursed when travel is completed. If you are not currently signed up for this service, please sign up as soon as possible. Duo Authentication is especially necessary when accessing documents from off campus.

STEP THREE

The Travel Arranger will create the Travel Authorization document. Dr. Gudmestad and Nancy Rehe are responsible for review and approval of Travel Authorizations as Department Chair and Fiscal Officer.

Once the Travel Authorization (TA) has been approved, a TA number will be assigned by CSU. The Travel Arranger will email the TA number to the traveler. This is your verification that your travel has been approved and insurance coverage is in place.

Please note if International Travel is involved, the CSU Risk Management Office will contact you for additional required information. You must respond prior to departure.

If you must cancel your travel, please inform the Travel Arranger as soon as possible so the travel document can be cancelled.

STEP FOUR

While you are on travel, please obtain receipts that list your name, type of expense, cost, and method of payment (ie credit card with last four digits noted and/or bank statement). Receipts for international travel do not require money conversion -- the conversion will be completed by the Travel Arranger as part of the reimbursement process.

Receipts are not required for parking under \$25.00 and for meals paid at daily per diem rate.

If your lodging venue charges a "Resort Fee", request that the charge be removed. If the lodging vendor states that the "Resort Fee" is required, CSU policy will allow the expense to be reimbursed if it is within the budget allowed.

STEP FIVE

Submit all receipts to the Travel Arranger within seven to ten business days of your return. The Travel Arranger will review the receipts and discuss your desired reimbursement. The Travel Arranger will complete the Travel Reimbursement (TR) based on your requests.

Examples when planned expenses are not reimbursed:

- The event organizer has offered to reimburse your expenses, and you decide to save your CSU funds for future travel.
- You may have requested meal per diem but wish to forego meal reimbursement once the travel ends.

When the Travel Reimbursement (TR) document is prepared, the Travel Arranger will verify the account number and available funds with the Fiscal Officer. The Fiscal Officer will then review and approve the Travel Reimbursement.

The Travel Arranger will email directions to the traveler explaining how they may open, review, and agree to their travel reimbursement. NOTE- No payment will be made until the traveler has completed the steps in the email. Duo Authentication is required to access the Travel Reimbursement document in KUALI, especially if you are completing the approval from off campus.

After final approval by the CSU Travel Desk is granted then Accounts Payable will process the Travel Reimbursement. The funds will be deposited in your bank account on file with CSU.

If the Travel Reimbursement document is not fully approved within 60 days of the travel end date, you may be charged tax on your reimbursement per CSU regulations.



Colorado State University
TEM Customer Form

Traveler Information

Full Name: _____
First M.I. Last

Address: _____
Street Address Apartment/Unit#

City State ZIP Code

Home Phone: _____ Alternate Phone: _____

Emergency Contact Name and Relationship: _____ Phone _____
Emergency Contact _____

Traveler type: Student Non-employee If CSU Student enter studentID _____

Traveler Citizen

Status: U.S. Citizen Non U.S. Citizen

***If traveler is Non U.S. Citizen please answer following question and provide valid email address**

Describe purpose of travel _____

Current Valid email address for traveler _____

Department Information

Initiator Name: _____
First M.I. Last

Department number: _____
Department number

Department Address: _____
Department address

Initiator Email: _____

Initiator Phone: _____ Default Account: _____

Please print, complete, and return this form to Sharon Van Gorder B356 Clark Bldg

CSU History Department
Domestic Travel Request Form

Submit Form to: Sharon.Van_Gorder@colostate.edu
PLEASE KEEP A COPY OF THIS FORM FOR YOUR RECORDS

Travel requests should be made a minimum of two weeks in advance of your planned departure date.

Today's Date: _____

Your Name: _____

Your Home Address: _____

Travel Location and Purpose

(If there will be multiple locations and/or events please include name and location for each):

1. Location: _____ Event: _____

Purpose: _____

Travel start date: _____ Start time: _____ Travel end date (return to Fort Collins): _____

OR Add Segment 2 of trip below.

2. Location: _____ Event: _____

Purpose: _____

Travel start date: _____ Start time: _____ Travel end date (return to Fort Collins): _____

Account Name and Number to be charged. If Professional Development funds from the History Department will pay the travel cost then enter "Department" with no account number needed:

Account Name: _____ Account #: _____

For travel billed to research accounts- Principal Investigator name: _____

PI and traveler will be informed regarding estimated travel expenses in a joint email message.

Anticipated Expenses: Check all that apply

_____ Airfare booked through a State Approved Travel Agent (see list of State Approved Travel Agencies). Once the airline itinerary has been confirmed, Travel Arranger will confirm travel authorization number via email.

_____ Airfare, booked via Internet purchase. Per CSU travel rules, you are required to contact a State Approved Travel Agency to obtain a **written** comparison airfare quote and provide the quote to the History Department prior your travel departure.

_____ Written Comparison Quote Attached:

Cost quoted by Travel Agency: _____ Cost paid through Internet Purchase: _____

If purchasing airfare through the Internet, explain why the purchase is/was made via the Internet rather than using an approved travel agency _____

_____ Personal vehicle to and from Denver International Airport (DIA). Mileage is currently at 52 cents a mile.

_____ Location from where you will be departing: _____

_____ Personal vehicle to a location other than DIA, list destination location and address:

_____ Parking at DIA (a receipt is required if the cost is more than \$25.00)

_____ Groome Shuttle Service (a receipt is required stating total cost, your name and how paid). To reserve Groome Shuttle Service call (970) 226-5533 or make your reservation at <https://groometransportation.com/fort-collins/>. When making the reservation use the CSU Discount **CSUEMP**.

_____ Rental Car (a receipt is required stating total cost, your name and how paid). See list of State Approved Rental Car Agencies, applicable discount codes, and insurance coverage information.

_____ Parking at locations in destination city (a receipt is required for reimbursement)

_____ Shuttle, Uber, Lyft at destination city (receipts required, tipping allowed at maximum of 10%)

_____ Lodging (examples Hotel, Motel, Airbnb, Other, Sponsor Housing). Estimated lodging cost: _____

Destination city lodging per diem rate will be used for Travel Authorization if lodging cost is unknown. After travel please provide a hotel folio receipt stating guest name, amount paid, and payment method for reimbursement.

_____ Meals (no receipts are required if meals are paid per diem rate for the location. **Note:** CSU does not reimburse meals for one-day travel).

_____ Conference Registration (receipt required with conference name, cost, how paid, and who paid)

_____ Membership Fees (receipt is required showing cost, who paid and method of payment). Membership Fees will not be paid through a Travel Reimbursement; reimbursement will be completed via a Disbursement Voucher.

_____ Other (state item, examples are poster printing, entrance tickets to museums, toll road fees, etc.):

After Travel - submit all receipts to Sharon Van Gorder within 7 to 10 business days per departmental policy.

Office Use Only: Date Request Received: _____ Date Travel Authorization Completed: _____ Account Number Encumbered: _____ Confirmation Email Sent: _____ TEM Number: _____
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CSU History Department
International Travel Request Form

Submit Form to: Sharon.Van_Gorder@colostate.edu

PLEASE KEEP A COPY OF THIS FORM FOR YOUR RECORDS

Due to CSU Risk Management and Insurance processes, International Travel requests need to be made a minimum of two weeks in advance of your planned departure date.

Today's Date: _____

Your Name: _____

Your Home Address: _____

Travel Location and Purpose

(If there will be multiple locations and/or events please include name and location for each):

1. Location: _____ Event: _____

Purpose: _____

Travel start date: _____ Start time: _____ Travel end date (return to Fort Collins): _____

OR Add Segment 2 of trip below.

2. Location: _____ Event: _____

Purpose: _____

Travel start date: _____ Start time: _____ Travel end date (return to Fort Collins): _____

Account Name and Number to be charged. If Professional Development funds from the History Department will pay the travel cost then enter "Department" with no account number needed:

Account Name: _____ Account #: _____

For travel billed to research accounts- Principal Investigator name: _____

PI and traveler will be informed regarding estimated travel expenses in a joint email message.

Anticipated Expenses: Check all that apply

_____ Airfare booked through a State Approved Travel Agent (see list of State Approved Travel Agencies). Once the airline itinerary has been confirmed, Travel Arranger will confirm travel authorization number via email.

_____ Airfare, booked via Internet purchase. Per CSU travel rules, you are required to contact a State Approved Travel Agency to obtain a **written** comparison airfare quote and provide the quote to the History Department prior your travel departure.

_____ Written Comparison Quote Attached:

Cost quoted by Travel Agency: _____ Cost paid through Internet Purchase: _____

If purchasing airfare through the Internet, explain why the purchase is/was made via the Internet rather than using an approved travel agency _____

_____ Personal vehicle to and from Denver International Airport (DIA). Mileage is currently at 52 cents a mile.

_____ Location from where you will be departing: _____

_____ Personal vehicle to a location other than DIA, list destination location and address:

_____ Parking at DIA (a receipt is required if the cost is more than \$25.00)

_____ Groome Shuttle Service (a receipt is required stating total cost, your name and how paid). To reserve Groome Shuttle Service call (970) 226-5533 or make your reservation at <https://groometransportation.com/fort-collins/>. When making the reservation use the CSU Discount **CSUEMP**.

_____ Rental Car (a receipt is required stating total cost, your name and how paid). See list of State Approved Rental Car Agencies, applicable discount codes, and insurance coverage information.

_____ Parking at locations in destination city (a receipt is required for reimbursement)

_____ Shuttle, Uber, Lyft at destination city (receipts required, tipping allowed at maximum of 10%)

_____ Lodging (examples Hotel, Motel, Airbnb, Other, Sponsor Housing). Estimated lodging cost: _____

Destination city lodging per diem rate will be used for Travel Authorization if lodging cost is unknown. After travel please provide a hotel folio receipt stating guest name, amount paid, and payment method for reimbursement.

_____ Meals (no receipts are required if meals are paid per diem rate for the location. **Note:** CSU does not reimburse meals for one-day travel).

_____ Conference Registration (receipt required with conference name, cost, how paid, and who paid)

_____ Membership Fees (receipt is required showing cost, who paid and method of payment). Membership Fees will not be paid through a Travel Reimbursement; reimbursement will be completed via a Disbursement Voucher.

_____ Other (state item, examples are poster printing, entrance tickets to museums, toll road fees, etc.):

See next page for additional International Travel Information

INTERNATIONAL TRAVEL:

*International Travel requires additional information and approval by CSU Risk Management.
Please provide the following.*

Are you a United States Citizen: Yes _____ No _____

Name, address and telephone of lodging location from date _____ to date _____

Name, address and telephone of lodging location from date _____ to date _____

Cell phone number where you may be contacted while on International Travel: _____

Emergency contact name, relationship, and telephone number, while you are on International Travel:

Have you visited this destination(s) before? NO _____ YES _____

If YES, please describe how recently and for how long?

What modes of transportation will you use while on international travel (check all that apply):

- _____ Airplane _____ Rental Car _____ Walking
- _____ Train _____ Ship _____ Host Vehicle
- _____ Bus, Taxi _____ Other, explain _____

After Travel - submit all receipts to Travel Arranger (Sharon Van Gorder) within 7 to 10 business days per departmental policy.

Office Use Only:

Date Request Received: _____

Date Travel Authorization Completed: _____

Account Number Encumbered: _____

Confirmation Email Sent: _____ TEM Number: _____

Risk Management and Insurance Approval Date: _____

RMI Number: _____

Date RMI Number added to Travel Authorization: _____

CSU Motor Pool Vehicle Request

Submit request to Sharon Van Gorder
History Department, B356 Clark Building
or email request to Sharon.Van_Gorder@colostate.edu

Please keep a copy of this form for your records

Date of this request: _____

Your Name: _____

Address where the travel will begin: _____

Travel Location and Purpose

(If there will be multiple locations and/or events please include name and location for each):

1. Location: _____ Event: _____

Purpose: _____

Travel start date: _____ Start time: _____ Travel end date (return to Fort Collins): _____

OR Add Segment 2 of trip below.

2. Location: _____ Event: _____

Purpose: _____

Travel start date: _____ Start time: _____ Travel end date (return to Fort Collins): _____

Account Name and Number to be charged (If Professional Development funds from the History Department will pay the travel cost then enter "Department" with no account number needed):

Account Name: _____ Account #: _____

Research Travel

For travel billed to research accounts, enter the Principal Investigator name: _____

PI and traveler will be informed about the estimated travel expenses in a joint email message.

The Motor Pool can provide the following vehicles: sedan, 7 passenger van, 12 passenger van, SUVs, Passenger Buses, 4 x 4 Pickups, and ½ Ton Trucks.

How many vehicles are requested: _____

What type of vehicles are requested: _____

Who will be the driver or drivers? _____

Who will be the passengers in each vehicle?

Passengers who are not Colorado State University students, faculty, or staff are afforded no protection under the University's insurance policy and ride at their own risk.

NOTE: Vehicles cannot be picked up on Saturdays or Sundays

The CSU Motor Pool general use information, including information about repairs, insurance, after hour return and vehicle parking at personal residences may be reviewed at:

- <https://pts.colostate.edu/transportation/transportation-general-use-policy/>
- <https://pts.colostate.edu/transportation/transportation-vehicle-service-and-maintenance/>
- <https://pts.colostate.edu/transportation/transportation-vehicle-insurance/>
- <https://pts.colostate.edu/transportation/transportation-rental-vehicle-use-policy/>
- Approved uses- State rules forbid the operation of a University vehicle for personal use or for any other purpose other than authorized University business: teaching, research, and student and staff activities that relate specifically to Colorado State University. Smoking in University vehicles is against state law and is not allowed. Alcohol is not allowed in University vehicles.
- A University vehicle may be driven to a private residence and parked overnight if the driver is to depart early in the morning when Transportation Services is not open. The vehicle must be parked off the street and secured.

Office Use Only:
Date Request Received: _____
Date Motor Pool Request Made: _____
Date Internal Order Completed: _____ Account Number Encumbered: _____
Date Motor Pool Confirmed Reservation: _____
Confirmation Email Sent: _____

8/2019

State Approved Travel Agencies

Agency Name	Address	Phone	Email	Website
New Horizons Travel	300 E. Boardwalk Dr. Fort Collins, CO 80525	(970) 223-7400	info@travelnewhorizons.com	http://www.travelnewhorizons.com/
Frosch	3538 JFK Parkway STE. 2 Fort Collins, CO 80525	(970) 223-0442 (800) 255-0808	fortcollins@froschtravel.com	http://frosch.com/cotravel/
Travel Society	201 S. Whitcomb St. Fort Collins, CO 80521	(970) 495-6751	Jenny Bacon jennyb@travelsociety.com	http://www.travelsociety.com/

State Approved Car Rental Agencies

State Travel Card + State Approved Auto Rental Agency	CDW/LDW and auto liability insurance are included when discount codes are used to rent vehicle. Discount codes: Avis – A514145 Budget – T143828 Hertz – 65579 National/Enterprise – XZ12397	CDW/LDW and Liability Claim Information: Avis- (844) 717-5568 Budget- (844) 717-5568 Hertz- Online form link: Incident Report (877) 584-7159 Enterprise/National- (866) 300-3238
No State Travel Card + State Approved Auto Rental Agency	CDW/LDW and auto liability insurance are included when discount codes are used to rent vehicle. Discount codes: Avis – A514145 Budget – T143828 Hertz – 65579 National/Enterprise – XZ12397	CDW/LDW and Liability Claim Information: Avis- (844) 717-5568 Budget- (844) 717-5568 Hertz- Online form link: Incident Report (877) 584-7159 Enterprise/National- (866) 300-3238
No State Travel Card + Non-Approved Auto Rental Agency	Must purchase \$1M auto liability coverage AND CDW/LDW from auto rental agency	CDW/LDW and Liability Claim Information: Contact Auto Rental Agency Directly

UNALLOWABLE EXPENSES

Some common unallowable TRAVEL expenses on University funds include:

- ▶ Alcohol & entertainment.
 - ▶ Personal expenses (personal hygiene items, magazines, movie rentals, golf fees, child care, house sitters, etc.).
 - ▶ Travel insurance:
- a. collision damage waiver/loss damage waiver for rental cars
 - b. supplemental liability insurance on rental vehicles (unless not covered by contract)
 - c. value premiums on airline tickets
 - d. trip cancellation insurance
 - e. additional liability for rental cars
 - f. personal accident insurance on rented vehicles
 - g. supplemental life insurance for airline or common carrier travel.
- ▶ Traffic and parking fines
 - ▶ Most costs from accidents, thefts, damages or losses.
 - ▶ Personal, political, social or otherwise unofficial University business expenses or costs paid or reimbursed from another source. Should unofficial expenses occur in conjunction with official business, include sufficient documentation to define a clear and just separation and allocation of expenses. Generally, no costs may be paid from University funds for spouses, family or friends accompanying you. Any contracted State provisions cannot be extended to unofficial business travel or non-University employees not on official University business.

TRAVEL INFORMATION

Complete travel information, including applications for the State Travel Card can be found on the Business and Financial Services web page.

<http://busfin.colostate.edu/Depts/TravelSvc.aspx>

Information is also available from the Travel staff:

Terri Bedan 970-491-6021
Supervisor
terri.bedan@colostate.edu

Amanda Benker 970-491-1362
Accounting Technician
aiglaze@colostate.edu

Chris DeMint 970-491-2291
Accounting Technician
Chris.demint@colostate.edu

Central Help Email
Bfs_tem_users_questions@mail.colostate.edu

DON'T FORGET TO KEEP....

- Lodging folio
- Rental Car/gas receipt (s)
- Registration receipt (proof of payment)
- Ground transportation receipts (over \$25)

☛ REMEMBER TO TAKE YOUR STATE TRAVEL CARD



POCKET GUIDE for TRAVEL

Visit the Travel Home Page at:

<http://busfin.colostate.edu/Depts/TravelSvc.aspx>

GENERAL RULE

Travel charged to the University, regardless of the funding source, shall be for the benefit of the University and shall be completed using the most economical means available, which will satisfactorily accomplish the University's business.

AIR TRAVEL

Purchase airline tickets through one of the approved travel agencies. These agencies are knowledgeable of State airline contracts, available fares and billing requirements. Please refer to the internet ticket policy regarding purchase of Internet airline tickets. If vehicle travel is required due to nature of trip or items which must be transported, or because multiple travelers make vehicle travel the lowest cost, the traveler may be reimbursed for actual trip cost (mileage or rental car and gas). When a traveler chooses to drive, the traveler will be reimbursed the lower of actual mileage or rental car and gas OR the lowest obtainable 14-day advance restricted airfare plus transportation to and from DIA and destination ground transportation.

GROUND TRANSPORTATION

▶ Rental Cars – Use of the State contracted rental car agencies is mandatory. Car rentals must be paid with the State Travel Card when the employee has such card. The rental car contracts provide liability coverage in most cases. Use of the State Travel Card provides for most collision, damage and loss needs.

These agreements need to be used whenever the vendor is 1) located in an awarded city where the rental occurs; 2) has the category of vehicle necessary; and 3) honors the terms of the price agreement. **The SOC Price Agreements are located on the State of Colorado webpage under Automobile Rental:**

<https://www.bidscolorado.com/co/portal.nsf/xpPriceAgreement.sByCategory.xsp>

Off-road usage is **NEVER** covered by any insurance.

▶ Personal Vehicles – Use of privately owned vehicles is allowed if justified and approved by your supervisor and department head. Mileage allowances are paid at the rate of \$0.49/mile and are deemed to cover all operational expenses including gas, maintenance and insurance.

▶ Transportation Services – Use University motor-pool vehicles whenever possible for University employees on business travel within the continental United States. **Motor Pool vehicles are covered by insurance for all off-road travel.** Contact Transportation Services 970-491-0016. Department can arrange payment with an IO.

LODGING AND MEALS

Meal reimbursements are allowed for the actual cost of meals up to the maximum allowable per diem rate without receipts. Employees are allowed 75% of the applicable per diem rate on the first and last day of travel no matter what time the travel begins or ends. The university will use the per diem rates established by the state controller. **Day Trips (Single day travel) which start and end on the same day are not eligible for meal reimbursements.**

▶ Lodging- staying with family or friends – If you arrange private lodging (e.g., staying with family/friends) you can be reimbursed up to \$25/night for associated costs.

REQUIRED RECEIPTS

Receipts are required for all expenses over \$25.00 with these exceptions: 1. Airline charges made through an approved travel agent and charged to the University ghost card. 2. Registration (receipts required regardless of amount). 3. Rental Car (receipts are required for all rental car expenses regardless of amount). 4. Gas (receipts required regardless of amount). 5. Non-travel related expenses (i.e. supplies, services, etc.) receipts required regardless of amount. 6. Internet airline ticket charges/Airline change fees (receipts – e-ticket/itinerary/passenger receipt required regardless of the dollar amount).

ALLOWABLE EXPENSES

The following expenses can be allowed for reimbursement when incurred as a necessary part of approved travel:

- ▶ Rental car costs (receipts required for all expenditures).
- ▶ Registration fees (receipts or other positive proof of payment required).
- ▶ Commercial transportation (receipts required for each ride over \$25).
- ▶ Parking fees (receipt required if over \$25).
- ▶ State Travel Card transaction charges and Travelers check charges (receipts required if TOTAL amount exceeds \$25 during any one trip).
- ▶ Toll road charges.
- ▶ Telephone, fax and any other similar charges (for official business only – receipts required for any single charge exceeding \$25).
- ▶ Camping site fees for a commercial, state or National campground (Receipt required if over \$25).
- ▶ Laundry services when trip is 7 days or longer. Receipts are required if over \$25.00

TIMELY REIMBURSEMENT SUBMISSION

Per IRS regulations all travel reimbursements must be submitted within 60 days of the trip end date. Reimbursements must be approved by the traveler in Kuali within 60 days of the listed end date on the Kuali document. If approval is not complete within 60 days the reimbursement will be considered taxable to the employee traveler.