

TOPIC/ACTION	POLICY/PROCEDURE REFERENCE
<p><b>Travel Status</b> Clarification to reinforce that daily commuting expenses are not eligible for payment by the university.</p>	<p><b>Before</b> (Policy Section II, B, pg. 1)  <b>B.</b> An individual is considered in travel status when traveling on official university business whether or not expenses are to be paid by the university. For daily commuting to and from home/work location(s), an individual is not considered in travel status and therefore not eligible for travel payments.</p> <p><b>After</b> (Policy Details, I, B, pg. 2)  <b>B.</b> An individual’s daily commute to and from residence and headquarters, is not considered in university business travel status and therefore not eligible for travel expense payments.</p>
<p><b>Preapproval</b> Clarification of text to ensure appropriate documentation and authorization is gathered prior to travel; while T# required before any OSU payments for travel.</p>	<p><b>Before</b> (Policy Section IV, A, pg. 3)  <b>A.</b> Approval for university business travel and its estimated costs, must be documented prior to the trip and available for audit and review.  <ol style="list-style-type: none"> <li>1. An individual may not approve his/her own travel.</li> <li>2. Individuals who are authorized to approve travel are designated by each college and vice presidential area and detailed in the unit’s Delegation of Signature Authority document. Throughout this policy this approval is referenced as “designated approval authority.”</li> </ol> </p> <p><b>After</b> (Policy Details, III, A and B, pg. 3)  <b>A.</b> Prior to any trip, travelers must obtain preapproval to leave headquarters for university business travel. Such approval must be documented (e.g., eTravel, business leave, other written approval, etc.) prior to the trip and available for audit and review. Estimated costs and business purpose associated with the business travel must be included in the documentation.  <ol style="list-style-type: none"> <li>1. An individual may not approve her/his own travel.</li> <li>2. Individuals who are authorized to approve travel are designated by each unit and detailed in the unit’s Delegation of Signature Authority document. Throughout this policy this approval is referenced as designated approval authority.</li> </ol> <b>B.</b> Payments for university business travel must be approved by a designated approval authority and a T Number must be issued prior to the trip to use university procurement methods (i.e., PCard, Purchase Order, or eTravel payments).</p>
<p><b>Cash Advance Payments</b> Update to text to identify turn-around period to return unused cash.</p>	<p><b>Before</b> (Procedure Section III, B, 2, pg. 5)  <b>B.</b> ... Any cash in excess of the approved reimbursable expenses must be returned to the appropriate departmental account or sponsored project.</p> <p><b>After</b> (Policy Details, IV, B, 3, pg. 4)  <b>3.</b> Any cash in excess of the approved reimbursable expenses must be returned to the appropriate departmental account or sponsored project within 30 days of completion of the trip.</p>
<p><b>Approval Threshold</b> Clarification of text to ensure the entire estimate is included in the 20% threshold before additional approval is required.</p>	<p><b>Before</b> (Procedure Section IV, D, pg. 6)  <b>D.</b> Reimbursements that exceed the travel estimate by 20% or more must be approved by the designated approval authority.</p> <p><b>After</b> (Policy Details, V, F, pg. 4)  <b>F.</b> Total travel expenditures that exceed the travel estimate by 20% or more must be approved by the designated approval authority.</p>

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<p><b>Vacation in Conjunction</b> Clarification of text to ensure clearer understanding of the documentation and approval requirements when combining vacation with business travel.</p>	<p><b>Before</b> (Policy Section VII, A and B, pg. 3)</p> <ul style="list-style-type: none"> <li>A. Travel will only be paid when expenses are incurred at locations specific to the business purpose. Travel expenses to and from alternate vacation destinations while on business travel are not eligible for payment.</li> <li>B. In cases where vacation time is added to a business trip, any cost variance in expenses such as airfare, car rental and/or lodging must be clearly identified and documented.</li> </ul> <p><b>After</b> (Policy Details, VII, A, B and C, pg. 4)</p> <ul style="list-style-type: none"> <li>A. Travelers incurring additional costs by taking vacation in conjunction with business travel must pay for the costs of travel and other expenses with personal funds and request reimbursement for the business travel costs after completion of the trip.</li> <li>B. Travel expenses to and from alternate vacation destinations occurring before, during, or after university business travel are not eligible for payment with university procurement methods.</li> <li>C. In cases when vacation time is added to university business travel, any cost variance in expenses such as airfare, vehicle rental, and/or lodging must be clearly identified and documented in eTravel, to validate that the vacation time does not add additional cost to the university.</li> </ul>
<p><b>Group Travel</b> Adjustment to text to support preferred supplier contracts.</p>	<p><b>Before</b> (Policy Section VIII, A and B, pg. 3)</p> <ul style="list-style-type: none"> <li>A. Group travel purchased from one of the university’s designated travel agencies is exempt from bidding requirements.</li> <li>B. Competitive bids must be solicited if the designated agencies are not used and the total cost of the trip exceeds the bid thresholds for university funds and/or federally sponsored contracts/grants.</li> </ul> <p><b>After</b> (Policy Details, VIII, A and B, pg. 4)</p> <ul style="list-style-type: none"> <li>A. Travel arrangers are strongly encouraged to procure group travel services, when available, from the university-preferred supplier.</li> <li>B. Competitive bids must be solicited if the university-preferred supplier is not used and the total cost of the trip exceeds the bid thresholds for university funds and/or federally sponsored contracts/grants.</li> </ul>
<p><b>Exceptions</b> Adjustment to text content to include the Senior Fiscal Officer with the group of authorized approvers for exceptions.</p>	<p><b>Before</b> (Policy Section IX, pg. 4) Occasional and non-recurring exceptions to the Travel Policy must be documented in the travel system and approved by the dean, vice president or their designated approval authority.</p> <p><b>After</b> (Policy Details, X, A, pg. 4)</p> <ul style="list-style-type: none"> <li>A. Occasional and non-recurring exceptions to this policy must be documented in eTravel and approved by the dean, vice president, <a href="#">senior fiscal officer</a>, or their designated approval authority.</li> </ul>
<p><b>Reasonable Accommodations</b> Text added to policy to specifically reference reasonable accommodations language.</p>	<p><b>No previous content</b></p> <p><b>After</b> (Policy Details, XI, A, pg. 4)</p> <ul style="list-style-type: none"> <li>A. Requests for reasonable accommodations for a disability will be considered by units in consultation with the <a href="#">Americans with Disabilities Act (ADA) coordinator</a>.</li> </ul>

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<p><b>Document Retention</b> Text added to policy to specifically reference document retention.</p>	<p><b>No previous content</b></p> <p><b>After</b> (Policy Details, XII, A, pg. 4 and 5)  <b>A.</b> All travel related documentation (including and not limited to receipts, itinerary, registration materials, etc.), must be scanned into eTravel. Hard copies of these documents must be retained by the unit for 60 days consistent with the university <a href="#">Records Retention Schedule</a> and must be available for review and audit.</p>
<p><b>Training</b> Text added to policy to specifically reference training.</p>	<p><b>No previous content</b></p> <p><b>After</b> (Policy Details, XII, A, pgs. 4 and 5)  <b>A.</b> <a href="#">Online training courses</a> are offered for travelers and eTravel system users.</p>
<p><b>Airfare Expense</b> Text updated to include key policy bullets to meet current industry standards.</p>	<p><b>Before</b> (Procedure Section V, pg. 7)</p> <ul style="list-style-type: none"> <li>• University’s designated travel agencies are the preferred Suppliers.</li> <li>• Coach class or economy ticket should be purchased for domestic or international flights with flight times totaling less than 5 consecutive hours—excluding layovers. University travelers should incur the lowest reasonable airfare expenses that meet business needs.</li> </ul> <p><b>After</b> (Procedure, I, A-G, pg. 5)</p> <ul style="list-style-type: none"> <li><b>A.</b> Transportation connected with university business travel should be purchased at the lowest reasonable coach/economy fare that meets business needs.</li> <li><b>B.</b> Economy plus, seating upgrades, or pre-boarding options are not permitted to be purchased with university resources and will not be reimbursed.</li> <li><b>C.</b> First class airfare is not permitted to be purchased with university resources and will not be reimbursed.</li> <li><b>D.</b> Business class is only permissible with international flight times in excess of five consecutive flight hours, excluding layovers.</li> <li><b>E.</b> Airfare/rail should be procured through the university-preferred travel agency or online booking tool to ensure access to airline and other negotiated discounts.</li> </ul>
<p><b>Ground Transportation Expense</b> New text added to address the unique specifics relative to ground transportation.</p>	<p><b>No previous content</b></p> <p><b>After</b> (Procedure, II, pg. 5)  Travelers should incur the lowest reasonable ground transportation cost that meets business needs.</p>

<p><b>Personal Vehicles</b> Clarification to reinforce that daily commuting expense is not eligible for payment by the university.</p>	<p><b>Before</b> (Procedure Section V, pg. 7)</p> <ul style="list-style-type: none"> <li>• Mileage will be reimbursed in the travel system for personal vehicles as a primary mode of transportation if the cost does not exceed the least expensive airfare. Additional expenses, including but not limited to hotel expenses and Per Diem, should be considered when comparing the cost of a trip by auto to airfare.</li> <li>• Reimbursement for usage of a personal automobile is based on the IRS mileage rate or the actual cost of gasoline. IRS mileage rate includes all vehicle related expenses (i.e. gasoline, wear and tear and personal auto insurance).</li> </ul> <p><b>After</b> (Procedure, III, pg. 6)</p> <ol style="list-style-type: none"> <li>A. Mileage will be reimbursed in eTravel for personal vehicles as a primary mode of transportation if the cost does not exceed the least expensive airfare. Additional expenses, including and not limited to lodging, parking, and per diem, must be considered in advance of the trip when comparing the cost of auto to airfare.</li> <li>B. Reimbursement for use of a personal vehicle is based on the <a href="#">mileage reimbursement rate</a>. The mileage reimbursement rate includes all vehicle-related expenses (i.e., gasoline, wear and tear, and personal auto insurance).</li> <li>C. Travelers will not be reimbursed for mileage when commuting to and from their residence and headquarters. If a traveler is required to report to a location(s) other than their headquarters during a normal work schedule, the traveler will only be reimbursed for the total distance from their residence to the alternate location(s) less the traveler’s normal commute.</li> </ol>
<p><b>Lodging Expense</b> Text updated to implement a specific lodging threshold.</p>	<p><b>Before</b> (Procedure Section V, pg. 11)</p> <ul style="list-style-type: none"> <li>• The university will permit payment of lodging expenses at reasonable, single occupancy or standard business room rates.</li> <li>• The cost of overnight lodging (room rate and tax only) will be paid if the authorized travel is 45 miles or more from the traveler’s home or primary work site.</li> <li>• Payment will be limited to the conference rate when the hotel/motel is the conference/convention site.</li> </ul> <p><b>After</b> (Procedure, VI, pg. 7)</p> <ol style="list-style-type: none"> <li>A. The university will permit payment of lodging expenses at reasonable, single occupancy, or standard business room rates.</li> <li>B. Payment must not exceed either the conference rate at the conference/convention site or twice the <a href="#">federal lodging rate</a> for the business travel location. If the lodging expense falls within the range of 1.5 to 2 times the federal lodging rate and is not a conference rate, then additional justification is required.</li> <li>C. The cost of overnight lodging (room rate and tax only) will be paid if the authorized travel is 45 miles or more from the traveler’s residence or headquarters.</li> </ol>