

Non-Employee Travel – Local Funds Only Guideline

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I. Title

Non-Employee Travel – Local Funds Only Guideline

II. Objective

Travel Guideline DIS-T-GL8 provides information on University of Texas at Arlington (“UTA” or “University”) prospective employees and non-employees who are traveling for UTA sponsored business. This includes travel within the contiguous United States (“U.S.”) and travel to states/countries outside of the contiguous U.S. (“Foreign Travel”).

All travel by prospective employees and non-employees must be charged to local funds only.

III. Scope – Who Should Know

Non-employees include, but are not limited to, prospective employees, consultants, speakers, independent contractors, University alumni, University retirees and volunteers who are traveling for official UTA business.

IV. Guideline

A. Travel and Duty of Care Policy

See UTA [BF-T-PO-01](#) *Travel and Duty of Care Policy* for complete information that applies to this guideline and all University funded travel:

- Definitions
- Relevant federal and state statutes and websites
- Relevant UT System rules and policies
- Applicable UTA policies, procedures, travel guidelines, and additional resources
- Applicable UTA forms

B. Travel Profile and Concur Travel Request

1. Establishing Travel Profile in UT Share

A travel profile must be created in UTShare and Concur for the non-employee. [Form BF-T-F6](#), *Non-Employee Expense Reimbursement* must be completed and submitted to the [Office of Disbursements](#) (“Disbursements”) for entry into UTShare and Concur. Disbursements will establish a profile and provide an identification number to the department. This identification number will be used in place of an employee identification number (Empl ID) for establishing travel documents.

2. Concur Travel Request

A Concur Travel Request (“Travel Request”) is required for the non-employee if one (1) or more of the following apply:

a. Airfare

The University will be purchasing airfare from one of the contracted travel agencies or online using Concur.

b. Car Rental

The University will be renting a car that is reserved through one of the contracted travel agencies or online using Concur, and billed to the University’s Corporate Business Account.

c. Overnight Travel

The Travel Request is to be completed by the responsible UTA department and must give the traveler’s name, dates of travel, destination, purpose of travel and an anticipated cost.

The Travel Request must be fully approved prior to the start of travel. ‘Fully approved’ indicates that all required workflow approvals have been completed.

For complete information on the Travel Request, please see UTA

Travel Guideline [DIS-T-GL2](#) *Pre-Travel Requirements – All Fund Types*.

C. Transportation

When there is a benefit to the University, the department may arrange the transportation for the non-employee traveling on official University business.

1. Airfare

- a. The department may purchase airline tickets using Concur or one of the contracted travel agencies, and have direct billed to UTA (See UTA Travel Guideline [DIS-T-GL6](#) *Travel Agencies & Concur – All Fund Types*)
- b. Seat upgrades paid with University funds will require an exception be submitted prior to booking the ticket and approval given. See [Exceptions](#), for complete information.

2. Auto Rentals – Contiguous U.S. Travel Only

The department may reserve a car for the non-employee through Concur or one of the contracted travel agencies with the auto rental companies that The University of Texas System (“UT System”) has contracted with. These reservations will be direct billed to UTA.

See UTA Travel Guideline [DIS-T-GL7](#) *Transportation Options in Travel Status – All Fund Types*.

3. Personally Owned Motor Vehicles

- a. UT System Policy [UTS 157](#) encourages the use of rental vehicles instead of personal vehicles when conducting business for UTA.
- b. Non-employees will be reimbursed for mileage in accordance with [GSA Privately Owned Vehicle \(POV\) Mileage Reimbursement Rate](#) which is usually updated January 1 of each year. Archived mileage rate may be viewed at [POV Mileage Rate Archived](#).
- c. Mileage is based on the shortest, reasonable distance. The total of miles traveled will automatically be calculated in Concur Expense using Google Maps for the route(s) of travel.
- d. Mileage for non-overnight travel requires Concur Expense.
- e. Mileage with overnight travel requires an approved Concur Travel Request and submitted Concur Expense.

D. Lodging

The sponsoring University department has two (2) options for handling commercial lodging establishment charges for non-employees:

1. Reimbursement to Non-Employee

The non-employee self-pays the lodging charges and is reimbursed via Concur Expense.

a. Non-Allowable / Non-Reimbursable Charges

The department must inform the non-employee in advance that UTA will not pay for/reimburse telephone charges, movies, room service, and other miscellaneous services/charges.

2. Direct Bill to Sponsoring University Department

The sponsoring University department must arrange for the lodging expenses to be direct billed to the department.

NOTE: If this is the only expense that the University will be paying on behalf of the non-employee, a Concur Travel Request is not required.

a. Non-Allowable / Non-Reimbursable Charges

The department must inform both the non-employee and commercial lodging establishment in advance that UTA will not pay for/reimburse telephone charges, movies, room service, and other miscellaneous services/charges.

E. Contiguous U.S. – Meals, Miscellaneous and Incidental Expenses – Overnight Stay Required

1. General Services Administration Federal Per Diem Rates

For meals and incidental expenses that occur with overnight travel, all non-employees must use the General Services Administration [federal per diem rates](#) for both in-state and out-of-state travel within the contiguous United States (“U.S.”)

2. Travel Meals and Incidental Expenses – No Receipts Required

Non-employees may be reimbursed per diem for meals and incidental expenses incurred when traveling for University business. Per diem is an allowance related to meal costs (including tax and tip) and incidental expenses such as tips given to baggage handler,

Incidental expenses, which are limited to \$5/day are also included in the M&IE. The non-employee will automatically receive the Incidental Expense for each day of travel except on the first and last day of travel. The cost of tips paid out of pocket to baggage handler,

valet, hotel staff, etc. may not be duplicated in reimbursement requests.

a. Meal Expenses

- i. UTA allows per diem for meals expenses incurred with an overnight stay based on the table known as Meals & Incidental (M&IE) Rates which is reflected in the [GSA per diem tool](#) for the duty location. This must include tax and tip for the meal.
- ii. M&IE rates for the full daily amount can be received for a single calendar day of travel when that day is neither the first nor last day of travel.
- iii. First and last days of travel will be prorated to 75% of the total M&IE, regardless of the non-employee's time of departure or time of return as calculated on the GSA per diem tool for the specific duty location.
- iv. If a meal was provided to the non-employee, and not paid for out-of-pocket, that meal must be deducted from the full day's per diem rate. The applicable meal must be checked in Concur Travel Allowance, which will automatically prorate the per diem rate for the day.
- v. Receipts for meals are not required.
- vi. Meal per diems must include tax and a maximum of a 20% tip for the entire bill.
- vii. Departments may invoke policies such as only claiming actuals, but the total cannot exceed the GSA rate allowed for the day and the duty location.

3. Business Travel Expenses Allowed (Partial List) – Itemized Receipts Required

a. Rental of Motor Vehicle by Non-Employee

The supporting document must include a receipt that reflects:

- Rental company name
- Renter's name
- Start and end dates of the rental
- Itemization of expenses incurred

b. Transportation

- i. **Travel by bus, subway, taxi, ridesharing (e.g., Uber/Lyft), shuttle, or other modes of mass transit**

The receipt must be itemized:

- Date service was received
- Fare charged for each trip

Note: Tips paid cannot exceed 20% of the total bill

ii. **Travel by railroad, boat, bicycle, or other motor vehicle**

The receipt from a commercial transportation company must include:

- Transportation company name
- Traveler's name
- Dates of service
- Mode of transportation
- Itemization of expenses incurred

c. **Laundry Charges**

Laundry charges when traveling for five (5) or more consecutive business days.

4. **Misc. Business Travel Expenses – No Receipt Required**

All other allowed miscellaneous business travel expenses do not require receipts for reimbursement. A description of the expense must be included in the expense report.

5. **Non-Allowed Travel Expenses**

The following expenses **cannot** be reimbursed:

- a. Gasoline and repair costs for personally owned vehicles
- b. Excess baggage charges for personal belongings

Note: This includes checking more than one (1) piece of luggage, and overweight or oversized luggage.

- c. Personal items not required for official university business - including, but not limited to:

- Dental hygiene products
- Haircare products
- Cleaning/laundry if less than five (5) consecutive business days
- Alcoholic beverages
- Sporting events
- Kennel or boarding charges for a pet
- Babysitting or daycare charges for a child(ren)
- Tours – personal only

Note: If the tour supports a University need, the

expense report must state the specific business need.

F. Foreign Travel – Outside of the Contiguous U.S.

1. Approval for Travel to Restricted Regions

University-sponsored travel that includes non-employees to restricted regions outside of the contiguous U.S. must be approved by the UTA [International Oversight Committee \(IOC\)](#) prior to travel. Restricted regions are identified by the following:

a. U.S. State Department [Travel Advisories](#):

- i. **Level 4:** Do Not Travel
- ii. **Level 3:** Reconsider Travel (This includes numerical advisory levels for sub-regions within a country. (e.g., states in Mexico).

b. [The Centers for Disease Control and Prevention \(CDC\) Travel Advisory](#)

- i. **Travel Health Notice Level 3:** Avoid non-essential travel

c. IOC Identified

- i. Counties or regions deemed to have significant health or safety concerns.

The countries on the current travel advisory list may be found on the [U.S. Department of State](#) website. Countries on the travel warning list may include Canada or Mexico. Additionally, the Level 3 updates for non-employee travelers may be found on the [Centers for Disease Control and Prevention](#). Travel Authorizations to request exemptions for non-employees travel to countries listed on either website can be found on the [IOC Website](#) and should be directed to the UTA IOC Chair at horn@uta.edu.

If the U.S. Department of State or the Centers for Disease Control and Prevention issues a travel advisory, any planned travel not started by the non-employee will be automatically suspended pending review by UTA IOC. Travel in progress by non-employees when the warning is issued, will be evaluated by UTA IOC to determine whether the threat is imminent, and non-employees should be recalled.

d. Travel Requirement to Restricted Regions

- Documentation reflecting IOC approval must be

attached to the Travel Request.

2. **On Call International Registration for Non-Employees**

All non-employees traveling outside of the contiguous U.S. are encouraged to purchase a personal membership with On Call International (“On Call”) prior to travel. On Call is a comprehensive, 24-hour medical, security, and travel assistance organization that provides international assistance services, and responds to calls for help and advice, managing the simplest task such as a doctor referral to the most complex emergency evaluation.

Non-employees can register and purchase a membership with [World Trips](#). On Call is the global assistance provider for these policies. Non-employees who purchase a personal membership to On Call will receive a membership card, security and medical alerts, and country guides.

Non-employees who travel to areas of high risk, who have received approval from IOC, but do not purchase the personal membership to On Call, will still be covered under the University’s security evacuation program.

3. **Foreign Travel – Meals & Business Expenses**

Travel to Alaska, Hawaii, or U.S. Territories: Travelers will use The Department of Defense (“DoD”) per diem rate lookup which is found on the [Defense Travel Management Office website](#).

Travel to All Other Foreign Countries: Travelers will use the [U.S. Department of State](#) (“DoS”) per diem rate query.

a. **Local Meals**

i. **Total Up to Daily Rate - No Receipts Required**

All meal expenses are reimbursed for actuals up to, but not exceeding the DoD or DoS daily Local Meal Rates.

The total must include tax and a maximum tip of 20% for the entire bill.

ii. **Exceed Daily Per Diem Rate - Itemized Receipts Required**

Meals that exceed the maximum DoD or DoS daily Local Meal rate for the location will require itemized receipts.

iii. **Alcohol**

Alcohol is **not** allowed as part of travel meals.

iv. First and Last Day of Travel

First and last days of travel will be prorated to 75% of the DoD/DoS daily Local Meal rate, regardless of the non-employee's time of departure or time of return as calculated on the DoD/DoS per diem tool for the specific duty location.

v. Meals Provided to Traveler

If a meal is provided to the non-employee, and not paid for out-of-pocket, that meal must be deducted from the fully days per diem rate. This might include a meal provided by a conference, meeting host, etc. The applicable meal must be checked in Concur Travel Allowance, which will automatically prorate the per diem for the day.

b. Business Travel Expenses

i. Daily Foreign Local Incidental Per Diem - No Receipts Required

Non-employees will automatically receive the maximum daily foreign local incidental rate, which can be applied to, but not limited to, the following expenses:

- Cleaning/laundry expenses when traveling for five (5) or more consecutive business days.
- Baggage tips - airport / hotel
- Other miscellaneous hotel tips
- Toll charges
- ATM fees
- Cash advance fees

ii. Miscellaneous Business Travel Expenses - Itemized Receipts Required

Miscellaneous business travel expenses are reimbursed for actuals and include, but are not limited to:

1) Rental of Motor Vehicle

The itemized receipt must indicate:

- Rental company name
- Non-employee's name
- Starting and ending dates of the rental

- Itemization of expenses incurred

2) **Public Transportation**

Travel by bus, subway, taxi, ridesharing (e.g., Uber and Lyft), shuttle, or other modes of mass transit. The itemized receipt must include:

- Date of service
- Fare charged for each trip
- If applicable, maximum of 20% tip

iii. **Miscellaneous Business Travel Expenses – No Receipt Required**

- Passport/Visa application fees
- Airport boarding passes
- Departure taxes
- Required inoculations/health screenings

iv. **Prohibited Miscellaneous Travel Expenses**

1) **Excess Baggage Charges**

Excess baggage charges for personal belongings. This is inclusive of checking more than one (1) piece of luggage, overweight or oversized.

2) **Personal Items**

Personal expense items not required for official university business – including, but not limited to:

- dental hygiene products
- haircare products
- cleaning or laundry if less than five (5) consecutive business days
- alcoholic beverages
- sporting events
- kennel or boarding charges for a pet
- babysitting or daycare charges for children
- tours – personal only

Note: If the tour supports a University need, the expense report must state the specific business need.

3) **Other Miscellaneous Charges**

Any expense not required for official UTA

business.

G. Cancellation or Change Charges

1. Recall by the University

A non-employee will be reimbursed for travel expenses incurred if they must return to their designated field office before University business is completed because of an illness, personal emergency, or recall by UTA.

2. Natural Disaster

Cancellation charges may be reimbursed if UTA business could not be conducted because of a natural disaster.

3. No Shows

Cancellation charges for "No Shows" due to personal reasons cannot be reimbursed.

4. Cancellation Charges

Cancellation charges for airfare paid by the non-employee will only be reimbursed if approved by the Associate Vice President & Controller for Business Affairs. See [Section I](#) of this guideline.

5. Receipts/Invoices

Receipts or invoices are required to document each cancellation charge submitted for reimbursement.

H. Expense Processing

1. Concur Expense

The expense report in Concur is prepared when reimbursing the non-employee for business travel expenses. For information on how to complete the Expense Report, please see [Knowledge Services Training Resources](#). All submissions must have UTA Form [DF-BF-T-F8](#) *Travel Or Non-Travel Expense Coversheet* attached prior to submission.

2. Receipts to Support Expenses

Required receipts must be attached to Concur Expense. All receipts should be in the name of the non-employee and be for the dates claimed on the expense report. Always attach an explanation if there are differences.

3. Services Based on Contract/Agreement

If the non-employee has been contracted to perform services, a copy

of the contract/agreement between the University and the non-employee must be attached to the expense report to ensure travel expenses are being appropriately reimbursed.

I. Exceptions to this Guideline

There may be occasions when departments need to request an exception on behalf of the non-employee. Exception approval to this guideline must be obtained prior to the start of travel, using the **Business Affairs Exception Tracker** located in [UTA SharePoint](#). Documentation of the request and its' disposition will be maintained in this repository.

V. UTA Offices Responsible for Guideline

Responsible Officer: CFO and Vice President for Business and Finance

Sponsoring Department: Office of Disbursements

VI. Dates Approved or Amended

June 1, 2022

July 12, 2024

November 4, 2024

VII. Contact Information

Questions regarding this guideline should be directed to the Office of Disbursements at 817-272-2194, or email travelservices@uta.edu.

Send notifications of errors or changes to: travelservices@uta.edu