SPONSORED PROJECT

bits +
pieces

Travel

What is the general travel process?

Create a travel request before travel in the University travel system (This will encumber the expense)

Request is routed through departmental workflow for pre-approval

Finalize the travel request upon return of travel within 60 calendar days to prevent the amount from being considered taxable wages

Request is routed for final approval for payment unless travel is within 10% or $150 of the pre-approved total

Who is responsible?

Traveler or designee

Departmental approvers

When does the travel request need to be finalized?

Traveler has 60 days from return of trip to submit in order to prevent being taxable

Timely approvals to demonstrate financial management and invoice sponsor (if paid by a sponsor project)

30 days prior to the final sponsor invoice due date

What if the traveler does not take the trip?

Funds encumbered need to be released timely and made available for other purposes

Related travel expenses need to be reviewed and evaluated for appropriateness and potential removal

Traveler needs to cancel the pre-approved travel within the University travel system

What if the travel request is not finalized?

Traveler is not paid

Funds remain encumbered on the cost object selected

For encumbrances on a sponsored project, the expense is not available to be invoiced to the sponsor and the final financial report cannot be processed at closeout

Supporting documentation

- Agenda/Itinerary
- Conference information
- Clear and legible receipts for all expenses such as hotel, airline, registration and transportation
- Handwritten notes on receipts describing the expenditure in lieu of a clear and legible receipt are not considered acceptable documentation
- Cost comparison if travel by auto vs air, if personal travel is included or if expense is purchased from an alternative travel service
- Signed justification for special meals/event expenses
- Mileage verification
- Foreign currency conversion rate as of the date of purchase

What if the trip is paid by a sponsored project?

Sponsor may include additional restrictions (i.e. Fly America Act, limited budget, restricted rates, etc.)

Generally, traveler should be paid by the project or cost share funds (payroll records are official documentation of an employee's activity)

Must directly benefit the scope of work on the project

Purchases prior to period of performance start date require sponsor approval

Travel within the period of performance

Travel requests must be fully expensed 30 days prior to the final sponsor invoice due date

What if the trip is paid by multiple sponsored projects?

As stated by NSF OIG Auditors, if an employee is working on two or more projects, travel should be allocated between the projects based on the relative benefit of the travel to each project

Resources

UFS Travel Services https://www.uky.edu/ufs/travel-services

UFS Day Trip Travel Quick Reference Card
http://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/How%20to%20Process%20a%20Day%20Trip.pdf

UFS Overnight Trip Travel Quick Reference Card
http://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/How%20to%20Process%20an%20Overnight%20Trip.pdf

BPM E-5-1 Reimbursement of Travel Expenses
http://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/bpm/E-5-1.pdf

Extras

Who can I contact for assistance?
     Business Officer
     College Grants Officer
     Leslie Duty – Travel Services
     FA (Financial Administrator)

Presentations: http://www.uky.edu/ufs/sponsored-projects-bits-pieces-presentations
RFS: https://www.uky.edu/ufs/research-financial-services
UFS: https://www.uky.edu/ufs/