

Travel

Brigham Young University uses the following procedures to reimburse employees, students, and guests (called a non-worker in Workday). A Workday spend authorization is used to approve an employee, student, or non-worker of the university to travel at university expense. A Workday expense report is completed to reconcile university credit card transactions and to seek reimbursement for expenses incurred on the trip. For instructions and training on Workday talk with your organization's finance operations specialist or finance business partner.

University On-Site Reservation Services

To provide optimum service levels and preferred pricing on travel arrangements, university employees are required to arrange all airfare, lodging, car, and bus rentals with travel agents at Purchasing & Travel. University employees should contact a travel agent as soon as they know travel dates and destination information to give travel agents as much time as possible to secure optimal fares and schedules.

Occasionally, travel arrangements from outside sources may need to be taken into consideration. Examples include special proprietary tour packages or external organization negotiated fares. Discuss these arrangements with your travel agent. If they approve of the purchase, they will send an approval email that can be submitted with receipts on your Travel Expense Report or through a requisition authorizing the purchase.

Travel Pre-Approval

All employees, students, and non-workers traveling on university-approved business must have a spend authorization in Workday for each trip that requires them to be away from home overnight and/or requires them to use commercial transportation. Spend authorizations are not required for same-day travel without commercial transportation (use of UTA Frontrunner, Trax or bus is excluded from this requirement). The spend authorization should be filed at least 10 days prior to travel whenever possible. Spend authorizations are reviewed and approved by the designated financial security roles within Workday. The spend authorization must be fully approved before travel agents can book travel reservations. The spend authorization must also be fully approved before travel occurs.

When traveling in a group, a spend authorization must be filed for each employee that will be seeking reimbursement after returning from their trip.

Group Travel: A spend authorization is filed by an employee that is acting as the travel leader for a group of BYU students. Employees functioning as group leaders should book airfare, lodging and other expenses on a university credit card. Group leaders must reconcile all university credit card transactions in a Workday expense within 30 calendar days of completing the trip.

Student Travel: A spend authorization is filed by an employee who is sponsoring the student's travel. The employee may use their university credit card to prepay for hotel or other expenses, if vendor policies permit. An employee assigned the security role of Expense Data Entry Specialist for Non-Worker can complete an expense report for a student that needs to be reimbursed for trip expenditures. On that expense report they will reference the spend authorization. If possible, the student should use commercial transportation over personal vehicles. Risk Management will approve any spend authorization that lists mileage costs greater than \$200.

When personal vehicles are being used by a student an [Assumption of Risk](#) form should be attached to the spend authorization for review by Risk Management.

Non-Worker (Guest) Travel: An employee assigned the security role of Expense Data Entry Specialist for Non-Worker can complete a spend authorization and expense report for a non-worker. Non-workers are not current BYU students nor employees, who are traveling by request of the university. Reimbursable expenses for non-workers are generally transmitted as a check payment.

Cash Advances

Cash advances are requested on a spend authorization within Workday. Only the Meal Per Diem and Miscellaneous-Travel expense items allow for a cash advance. The university functions under the IRS Accountable Plan Rules. Therefore, advances may be obtained and used only for business expenses by a university employee in active travel status. Efforts should be made to request only the amount needed for the trip—receiving cash for unplanned emergency use is not encouraged. ATM cash limits can be established on a travel or corporate card for emergencies.

University employees acting as a travel group leader may obtain cash advances of per diem for student participants on the same trip. In such cases a disbursement log should be maintained in which each student signs they received their allocation of the per diem. The log is then included with other receipts associated with that trip.

Larger travel programs such as athletic team travel, performing arts tours, and study abroad may work with Purchasing & Travel to use electronic payment of per diem directly to each student participating in the programs.

University issued credit cards generally eliminate the need for cash advances. In addition to convenience, credit cards reduce the financial risk of carrying cash or cash products. Therefore, advances are issued only to university employees for extended trips over 30 days or on trips in which the employee is acting as a group leader. Advances are not issued to individuals traveling for less than 30 days. If cash is needed on these trips, it can only be obtained with approval from the college/division controller authorizing an ATM cash withdrawal limit on the employee's Travel or Corporate card.

When approved in Workday, a cash advance settlement is initiated to the designated bank established on the payment election 14 days prior to departure.

The university considers a cash advance (whether through Workday or from an ATM) as a personal loan. The traveler must account for the cash advance within 30 calendar days of returning from their trip. After completing the expense report, if an employee owes money back to the university it will be recorded as an amount due to the university. The employee must promptly repay the amount due to the university. Travel advances left unsubstantiated and unspent balances not returned within 60 days will be reported on the compliance report distributed to the college/division and as taxable income to the employee.

Travel Expense Report

All employee, student, and non-worker expenses for university-approved business must be recorded in a Workday expense report within 30 calendar days of completing the trip. All trip expenses incurred must have an express business purpose. Travelers must not seek reimbursement for personal expenses on the expense report. Expense reports are reviewed and approved by the designated financial security roles within Workday before any payment can be made.

Travelers must submit electronic images of the original, itemized receipts for each expense exceeding \$50 claimed on the Travel Expense Report. All required receipts must show the vendor, transaction date, detailed description of the goods or services purchased, the amount paid, and the form of payment. Corporate charge card slips are generally not acceptable since they do not contain all the required elements of the receipt. Travelers do not need to submit receipts for meals when they are electing to claim per diem. If required original receipts are lost, a traveler must make reasonable efforts to obtain duplicates. If such efforts fail to produce duplicate receipts, the traveler completes the Lost or Missing Receipt Affidavit and submits it with the remainder of their receipts. All original receipts and documentation should be retained long enough to verify that the receipt has been properly saved, reviewed, and approved in Workday.

University credit cards are the preferred method of payment while in travel status. Refer to the university credit card procedures for more information about these cards.

Research Contracts

Many research contracts contain certain requirements by the sponsoring agency, especially when foreign travel is involved. Travelers should consult with Grants & Contracts Accounting when planning foreign travel under federal or nonfederal contracts or awards. Please note that most federal agencies require the use of U.S. air carriers and that certain awards have per diem limitations which may differ from regular university travel policy. All Spend Authorizations and Travel Expense Reports that use research contract accounts will be routed by to Research Accounting for approval in addition to the normal department approvals.

Extended Travel

Full-time employees traveling for extended periods of time (at least 30 days but not more than one year) may either travel under the regular travel policy or receive approval from their department for an extended per diem to cover all expenses of the trip. The negotiated per diem rate may not exceed the maximum federal per diem rate for meals and lodging for the specific approved travel destination(s), as published by the U.S. General Services Administration at www.gsa.gov. Purchasing & Travel can assist in planning extended trips and in determining appropriate per diem allowances within the published federal rates.

Under either method, payment to the traveler can be provided as follows:

- The preferred approach is to reimburse the traveler as expense reports are submitted through Workday regularly (e.g. monthly, quarterly). Claims for extended per diem are made after the dates transpire, they cannot be claimed into the future. Claims are listed as Extended Trip Per Diem using the Miscellaneous-Travel expense item in Workday. Reimbursements are deposited to the traveler's bank designated in their Workday payment election.
- Though discouraged for personal safety reasons, cash advances may be provided in advance of the trip. These large advances will need the approval of Expense Partners. If this approach is approved, a final expense report will need to be completed in Workday within 30 days of the conclusion of the trip to clear the advance and bill necessary charges to the university department.

Travel at Vendor Expense

Employees should not accept complimentary travel, hotel or food expenses paid by a vendor where the purpose of the vendor is to sell or promote a product or service. This does not apply to training trips regarding equipment or services that the university has or will make payment as part of the purchase price.

Personal Vacation While in Travel Status

A traveler must indicate any personal expenses incurred during their business trip on both the spend authorization and expense report. Such expenses include but are not limited to airfare, hotel, car rental and per diem meals. Personal portions of airline tickets should be paid for at the time of ticketing with the BYU travel agent. Personal portions of expenses associated with lodging, car rental or other travel expenses transacted on a university credit card need to be itemized on the expense report line with one of the itemization lines checking the personal expense box and recording the amount of the transaction that is personal. Personal meal periods during the trip need to be deducted from the overall per diem claimed on the expense report.

Travel Companions

Family members or other people may accompany travelers traveling on university business. However, if such people are to travel at university expense, advance approval must be obtained through their department in consultation with the Tax Office. The express business purpose of the companion's travel must be documented on the spend authorization. The Family Travel Substantiation form should be provided the Tax Office and attached to the spend authorization. Additional expenses incurred because of a traveling companion without a business purpose should be identified as personal expenses.

Unrelated persons of the opposite sex should exercise sensitivity and good judgment when traveling together to avoid the appearance of impropriety and so as not to compromise the integrity of appropriate personnel relationships or to reflect poorly on the university or The Church of Jesus Christ of Latter-day Saints. A person who feels uncomfortable or unsafe traveling in a one-on-one situation with someone may choose to make other travel arrangements.

Unrelated travel companions of the opposite sex must stay in separate lockable rooms during travel. Unrelated travel companions of the same sex may share a room only if no power differential exists (e.g., professor and student) and both agree to the arrangement; however, in no situation should an unrelated travel companion of the same sex be required to share a bed (each must be provided with a separate bed).

Independent Contractor Travel

All costs incidental to travel of independent contractors are the sole responsibility of the contractor.

Air Travel

Air travel accommodations must be coach or special fare class only. First class air travel is not an allowable expense. Travelers are responsible for booking air travel at the most economical rates using normally traveled routes. Travelers should make every effort to take advantage of all advanced purchases, Saturday night stays, promotional flights, reasonable non-direct flights, conference fares, special negotiated fares, departing and arriving at times slightly less than convenient and any other reasonable savings opportunities which do not compromise the effectiveness and purpose of the trip.

Air carrier selection cannot be biased by a traveler's frequent flyer affiliation. The lowest cost air travel will take precedence over frequent flyer programs. Any employee choosing a more expensive flight plan to take advantage of a promotional program such as a frequent flyer plan will be required to pay for any differences that exceed \$50 from their personal funds.

Enhanced coach, seat upgrade fees, or other airfare ancillary fees must be approved by the traveler's university department. Travel agents will record the verbal approval that the additional fees have been approved in the traveler's record.

Frequent flyer miles earned on travel funded by the university are maintained and redeemed individually by university travelers. Any frequent flyer miles earned while traveling on university business may not be exchanged for cash. Likewise, the university cannot reimburse travelers for their use.

When booking air travel, travelers must provide the fully approved spend authorization number to the on-site travel agent. Travel cannot be booked unless the trip has been fully approved.

If during consultation with a travel agent it is determined that an outside vendor is a better option over a university fare, the travel agent may send an email authorizing the purchase from the outside vendor. Both the receipt of purchase and the email authorization must be included in the expense report.

Unused airline tickets and residual funds are the property of the university and must be used for future business trips by the traveler. Travelers should notify their travel agent of unused ticket(s) and/or residual funds when booking their next trip. Tickets and residual funds being held for exchange on a later trip may not be used for personal travel unless the value of the ticket is paid personally by the university employee.

Travelers that book their airfare using the university central bill or university corporate/travel card will automatically receive, at no cost to themselves or the university, \$500,000 travel accident insurance from JPMorgan. Additionally, all university business travelers have coverage under the university's blanket travel insurance policy. Questions about insurance coverage should be addressed to University Risk Management at **801-422-4468**.

Airfare Equivalency

Whenever a traveler elects to drive instead of flying the Airfare Equivalency Worksheet for Travelers Electing to Drive should be completed prior to travel. This form allows travelers to claim the mileage reimbursement between the departure and destination cities at the current reimbursement rate set by the IRS or a calculated airfare equivalency (whichever is less). Per diem and hotel expenses for transit days may not be reimbursed when the traveler is electing to drive.

A traveler electing to travel by rail or bus should similarly document that their expenses do not exceed that which would have been incurred had they flown.

Automobile Rentals

Whenever a traveler elects to drive instead of flying the Airfare Equivalency Worksheet for Travelers Electing to Drive should be completed prior to travel. This form allows

travelers to claim the mileage reimbursement between the departure and destination cities at the current reimbursement rate set by the IRS or a calculated airfare equivalency (whichever is less). Per diem and hotel expenses for transit days may not exceed what would have been needed if the traveler would have flown to destination instead of electing to drive

A traveler electing to travel by rail or bus should similarly document that their expenses do not exceed that which would have been incurred had they flown.

[Airfare Equivalency Worksheet](#)

Motor Pool Travel

Motor Pool vehicles are often billed per mile. When combining personal vacation with a business trip, employees are responsible for logging personal miles and reimburse their department for these miles. Employees electing to request a larger vehicle than is required for the travel business purpose must reimburse their department for the additional cost incurred.

Travelers must report mechanical failure or accidents to the Motor Pool immediately at **801-422-5544**. For more details review the [University Vehicle Policy](#).

Privately Owned Vehicles

Travelers should abide by the University Travel Policy regarding use of personal vehicles while in travel status. Reimbursement for mileage will be at the IRS approved mileage rate and can be claimed on an expense report using the appropriate mileage expense item.

There is no reimbursement for the cost of repairs, maintenance, damages, or towing charges associated with a personal vehicle as these expenses are considered included in the IRS mileage rate. When traveling in a privately owned vehicle the driver's personal insurance will be the primary insurance.

For more information regarding use of personal vehicles for BYU related travel and for the Assumption of Risk form, please visit BYU's Risk Management website. <https://risk.byu.edu/risk/driving-or-riding-in-a-personal-vehicle-for-byu-related-travel>

Local Travel

Strictly on-campus mileage or normal commuting mileage to and from work is not reimbursable under any circumstances. Travelers required to use privately owned vehicles for local travel will receive reimbursement at the current IRS mileage reimbursement rate for business miles. These miles should be recorded on a mileage log and submitted in an expense report using the appropriate mile log expense item.

Mileage logs should be submitted at least once per semester. University vehicles should be used whenever possible for local travel.

Meal Per Diem

Travelers in approved travel status and same-day travelers away from home at least 12 hours are entitled to a meal per diem allowance. The university uses as a guide the per diem allowance amounts set by the IRS.

Per diem is an all-inclusive allowance established and governed by current tax laws and its use is for meals and incidental expenses. Travelers must choose to use per diem or claim actual expenses on their expense report, but may not mix the two options on a given trip. There is no allowance for additional charges for other meals, fees or tips to waiters, porter, baggage or bell persons, television and in-room movies, laundry, or transportation between places of lodging and dining when claiming per diem.

Per diem is allocated in the destination city time zone by meal period as follows:

Meal Time Periods	
6:01 a.m. to 12:00 noon	Breakfast
12:01 p.m. to 6:00 p.m.	Lunch
6:01 p.m. to 12:00 midnight	Dinner

(NOTE: The period of time from 12:01 a.m. to 6:00 a.m. may be used to extend either the breakfast or dinner meal period as needed.)

Whenever a meal is provided a traveler (for example as part of a conference, breakfast provided by a hotel, participating in a hosted meal, etc.) then the meal period should be deducted from the overall per diem claimed on the Travel Expense Report.

The Per Diem Table is based on the city and county you are traveling to. If your city is not listed in this table, you need to determine if the county is listed. Use the [National Association of Counties Website](#) to find the county of the city you will be traveling to. If your county is not listed, then it is the lowest per diem level. The per diem rate for travel to foreign countries, Alaska and Hawaii are the highest per diem rate.

Airport Transportation

The university offers a discounted rate with airport shuttle companies for transportation to the Salt Lake International Airport. Contact Purchasing & Travel for current vendors. You must identify yourself as a university employee when making the shuttle reservation and a BYU ID must be presented to the shuttle driver to receive reduced rates.

Travelers using personal vehicles to travel to and from the airport may request mileage reimbursement for the trip(s) taken to the airport plus applicable airport long-term parking costs.

Lodging Expenses

Travelers should use standard accommodations in reasonably priced, commercial-class properties. The traveler should use the university travel/corporate card to pay for lodging and to guarantee room reservations whenever possible.

Travelers should coordinate/book hotel reservations through Purchasing & Travel. This practice insures the best value, inclusion of all available discounts, and contract hotel availability.

Travelers do not receive reimbursement for lodging costs when they stay with friends or relatives. However, when traveling away from home overnight, a \$10.00 amount is allowed for each day of housing provided by family or friends. Travelers may use this allowance along with the regular meal per diem allowance, if applicable, to provide a gratuity to the host.

In-room movies, mini-bar charges, concierge services and other in-room services are not reimbursable beyond the approved per diem. Travelers should not charge long distance telephone calls on the hotel bill. Travelers should use a cell phone or a Veracity long distance number to have calls billed to the university. Veracity long distance codes can be ordered from the work tab under campus links on the myBYU page.

Conference Registration Fees

Conference registration fees should be paid using a university credit card whenever possible. Where university credit cards are not accepted, the traveler should create a requisition in Workday to initiate payment for the conference.

When attending a conference and claiming per diem, the traveler must reduce from their per diem any meals provided by the conference along with any other meals provided to the traveler. Attaching a copy of the conference registration or agenda that indicates meeting dates and meals provided by the conference is encouraged and is helpful to travelers, delegates, and approvers in determining and monitoring allowable travel expenditures.

Hosting and Entertainment

Occasionally, it may become necessary to host people while traveling. Costs for approved hosting activities are reimbursable only under the following conditions and with documentation of the specific business purpose:

The hosting employee must submit on the expense report the business purpose of the meal and the names and affiliation of the hosted persons. The employee must submit complete, actual receipts for the meal to receive reimbursement.

All university employees participating in the hosted meal must deduct that meal period from their overall per diem.

Moving and Temporary Relocation Expense

Moving expenses for permanent relocation of either incoming or outbound employees are covered under the [University Moving Policy](#). These expenses should not be submitted in a Workday expense report. Contact the Tax Office for questions on the moving policy.

International Travel

Additional security, health, and safety issues need to be considered when traveling abroad. Please refer to the International Travel section within the Travel Policy. All spend authorizations for International Travel to countries designated on the restricted list will be routed to the International Vice President's Office for approval in addition to the normal department approvals.

Non-Allowable Travel Expenses

Some expenses are the personal responsibility of the employee and are not reimbursable. The following list is not all inclusive but shows examples of such non-reimbursable expenses.

- Personal and family expenses
- Gifts and souvenirs
- Valet and room service charges
- Personal medical and dental expenses
- Personal reading material, recreation, and entertainment
- Travel insurance in excess of that already provided
- Costs incurred by traveler's failure to cancel transportation or hotel reservations
- Commuting between home and work
- Haircuts, newspapers, babysitting, shoeshines
- Parking and traffic citations
- Reimbursement or payment for frequent flyer benefits and reduced or free flight coupons issued by the airlines.

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