

The William States Lee College of Engineering – Travel Policies and Procedures
Updated: February 2022

Travel services provided to faculty and staff members traveling by the Business Services Specialist (BSS) or Business Services Coordinator (BSC) with:

- **2-week notice of departure date for state funded travel.**
 - **3-week notice for grant funded travel.**
1. Department chair or center director must approve travel for faculty and staff.
 2. **Travel Authorization form must be completed before departure** to show that you are in travel status for the university.
<https://finance.charlotte.edu/resources/forms/travel-forms-package>
- BSS/BSC will make transportation arrangements. Submit departure and return dates along with a time-window for travel, or provide a selected flight and carrier. BSS/BSC will make airline reservations with the carrier or university vendor (AAA), and will arrange pre-payment (P-Card). Rental cars will be reserved and prepaid with Enterprise (Banner 49er Mart; you must report vehicle ID number to BSS/BSC for insurance coverage when picking up vehicle). If you are seeking the best price using alternate vendors (e.g., Expedia, Orbitz, etc.), you will need to make your own reservations and charge it to your credit card and receive reimbursement upon your return.
 - Provide the conference website to your BSS/BSC. The BSS/BSC will prepay both the conference registration and your conference hotel (P-Card). If the conference hotel is not available, you will have your choice of one alternate hotel. **We will prepay hotel, registration fees, airline tickets, and provide you a travel advance for meals, taxi, tolls and other miscellaneous charges.** If you are seeking the best price or an alternate hotel, you will need to make your own reservations and charge it to your credit card and get reimbursed upon your return. Please read below for required original receipts.
 - Note: if you made any prepayments on your credit card prior to submittal of the travel authorization you will not be able to receive reimbursement until you return.
 - BSS/BSC will provide you with a folder, upon request, for receipts which upon your return you submit to your BSS/BSC for reimbursement. To avoid any additional taxes charged to you from your salary for delayed travel reimbursement beyond 30 days, it is imperative that you have your **receipts turned in within two (2) weeks** (preferably sooner). **After 30 days, tax will be charged by the university (IRS requirement).** If the travel advance exceeds expenses, you must reimburse the university after returning.

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3. **Original receipts required are:**

- Itemized Hotel Bill
- Taxi Receipts (note destination and business purpose)
- Baggage Receipts
- Toll/Shuttle/Bus Receipts
- Rental Car Receipts
- Airport Parking
- Internet Expenses
- International Expenses – include conversion chart <https://www.xe.com/travel-expenses-calculator/>

Be sure your name is on each receipt (in case of lost, it can be identified).

Services provided with only 7 day notice of Departure Date.

1. Department chair or center director must approve travel for faculty and staff.
2. BSS/BSC cannot provide any further assistance with this short notice.
 - **Travel authorization** is still required before departure date and should include copies of registration, hotel and flight information.
 - BSS/BSC will provide you with a folder, upon request, for receipts which upon your return from your trip will go to your BSS/BSC for reimbursement.
 - The College of Engineering wants you to avoid any additional taxes charged to you from your salary for delayed travel reimbursement beyond 30 days. It's imperative that you have your **receipts turned in within two (2) weeks** (preferably sooner). **After 30 days, tax will be charged by the university.** If the travel advance exceeds expenses, you must reimburse the university after returning.

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