



Travel Procedures Manual

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For additional information and forms, visit the travel office website at
<https://financialservices.ecu.edu/travel-office/>

For questions, please contact the travel office via email at
ecu_chrome_river@ecu.edu or telephone at 252-737-5700

TABLE OF CONTENTS

Section I: Purpose & Scope	4
Section II: Travel Policies, Rules & Regulations	4
Section III: Travel Authorization	5
Travel Advance	5
Section IV: Travel Reimbursement	6
Documentation	6
Registration	7
Fees and Service Charges by Travel Agents	7
Business and Personal Travel Expenses/Extended Stay Travel	7
Transportation	7
Duty Station	8
Rental Vehicle (commercial rentals)	8
Personal Vehicles	10
Commercial Airlines	10
Charter Aircraft	11
Taxis, Private Car Services (ex. Uber), Shuttles and Limousines	12
Rail or Bus	12
Parking Fees, Tolls, and Storage Fees	12
Subsistence (Lodging and Meals)	12
Lodging	12
Meals	13
Other Travel Expenses	14
Tips and Gratuities (Non-meals)	14
Telephone Calls and Internet Access	14
Passports	15
Section V: Travel Types	15
External Conference	15
Internal Conference	16
Training Session	17
Management Retreat	17
Blanket Travel	17
International Travel	18
Non-State Employee Travel	18
Prospective Professional Employees, including Faculty Candidates	18
Guest Speakers	19

Contractors	19
Section VI: Spending Allowance	19
Section VII: Cancelled Travel	20
Pre-Paid Fees for Cancelled Trips	21
Travel Advances for Cancelled Travel	21
Section VIII: Training	21
Section IX: Exceptions	22
Grant Funds	22
U.S. Flag Carrier Service and Fly America Act	22
Late Travel	23
Section X: Miscellaneous	23
Records Retention	23
Banner ID	23
Section XI: Terminology	24
Section XII: Appendices	26
Appendix A: Clarification of Lodging Options	26
Appendix B: Characteristics of Third-Party Lodging Establishments	27

SECTION I: PURPOSE & SCOPE

Travel and Employee Reimbursement policies and procedures at East Carolina University (ECU, or University) require compliance with state policy, state law, and federal law. The East Carolina University Policy Manual is the official repository of all approved policies, regulations, and rules (PRRs) at ECU. For convenience, links to the travel related PRRs along with brief descriptions of their contents are listed in section II of this manual. **All travelers should familiarize themselves with these PRRs prior to traveling.**

The ECU Travel and Employee Reimbursement Procedures Manual (manual) serves as both a reference guide and a procedures manual. The manual includes detailed travel and non-travel requirements related to university PRRs, state and federal laws and various regulatory agencies; therefore, it should be followed for all travel and non-travel related activities.

Emburse, located on PiratePort, must be used to request, and document all authorizations to travel (regardless of the method of payment) and document all travel costs. Emburse also documents all non-travel employee reimbursements and all ProCard transactions. Those without access to Emburse, such as non-employees and non-students, must use the [Manual Travel Authorizations/Reimbursement for Travel form](#) located on the travel office website. No other form may be substituted for this form.

Emburse training is offered in three different formats and explained in more detail in section VIII.

University employees are encouraged to use the most economical means of travel and are strongly encouraged to use a ProCard for their travel expenses. The application for a ProCard can be found on the [ProCard website](#). To make travel purchases, you will need the “T” spending class. This spending class will allow travel purchases, excluding personal meals while in travel status. Current cardholders can update their spending class by submitting the ProCard [account maintenance form](#). If the traveler chooses to make their own travel arrangements using personal funds, the traveler will be reimbursed **AFTER** the travel is completed and the traveler has submitted a completed, approved travel reimbursement request with the required documentation.

SECTION II: TRAVEL POLICIES, RULES & REGULATIONS

[Travel Approval and Reimbursement](#) – This regulation covers topics such as employee and departmental responsibilities, special rules for grant funds, consequences of non-compliance with travel policies, and state law penalties for filing false travel claims.

[Third Party Lodging](#) – This regulation describes the requirements and approval process for obtaining lodging and receiving reimbursement for a stay in an establishment that is rented by a third-party. Examples of third-party lodging includes timeshares, campgrounds, conference centers, vacation rental apartments or homes, private residences rented by an individual, etc. (Please see

Appendix A – Clarification of Lodging Options.) A [Third-Party Lodging Pre-Approval Form](#) must be prepared and approved prior to entering into a third-party lodging arrangement. Travelers must attach a copy of the approved Third-Party Lodging Pre-Approval form with their pre-approval request in Emburse.

[Reimbursable Travel for Non-State Employees](#) – This regulation establishes the criteria under which the university may reimburse or bear all or some of the travel expenses of persons who are not university employees. These include, but are not limited to, members of the Board of Trustees, research collaborators, prospective professional employees, spouse/partner/dependent (when appropriate), students on official university business including students traveling to fulfill a course requirement for academic credit, attendants of handicapped university employees, and volunteers traveling on official university business. This regulation also describes Internal Revenue Service requirements.

SECTION III: TRAVEL AUTHORIZATION

All University travel, regardless of the method of payment and including excess subsistence (lodging and meals), is subject to availability of budgeted funds and must be approved **before** travel may begin. All persons must complete a travel Preapproval which will be automatically routed through the approval process. The traveler's vice chancellor, or designee, must approve in advance all international travel. Prior to international travel, the traveler should contact the Office of Research Integrity and Compliance at 252-744-2395 to receive export control briefing. The traveler's vice chancellor, or designee, and the Vice Chancellor for Administration and Finance, or designee, must approve in advance the use of charter aircraft and the use of aircraft owned by a state employee. Emburse will automatically route the Preapproval through Global Affairs for their review. The Director of Athletics must approve, in advance, the use of charter aircraft, and the use of aircraft owned by a state employee for athletics team travel.

Travel Advance

A travel advance is a personal loan provided to an individual prior to an approved trip to cover out-of-pocket expenses while traveling. Each travel advance must be reconciled with the Travel Office and closed before another travel advance can be requested by the same traveler. Travel advances are for employees whose salary is \$50,000 or less. The appropriate vice chancellor, or designee, may approve an exception to the \$50,000 salary amount. Travel advances greater than \$5,000 require the approval of the Vice Chancellor for Administration and Finance or the Senior Vice Chancellor for Academic Affairs, or designee. Travel advances greater than \$5,000 for athletic team travel require the approval of the Director of Athletics. In Emburse, a traveler requests a Cash Advance on the Preapproval form by completing the amount requested on the header sheet. If approved, the Cash Advance will be paid two weeks prior to the depart date on the trip. Non-permanent employees (except students as directed below) may not receive travel advances. This does not preclude a staff or faculty member from obtaining a travel advance for students they are accompanying on a university sanctioned trip. A student who is not a permanent employee of the University may receive

a travel advance from non-state funds only with the approval of the appropriate vice chancellor, or designee, and the Associate Vice Chancellor of Financial Services.

Advance funds may be requested only for items, such as mileage when a personal car is used and per diem meals, parking, etc., that cannot be paid for with an ECU ProCard. Registration, airfare, and hotel costs can be paid with an ECU ProCard. Excess meals cannot be calculated into a travel advance. Estimated expenses must be attached to pre-authorization in Emburse. Travel advance requests cannot be submitted for less than \$200.00 and must not exceed 80% of the estimated cost of the trip. Travel advances may only be used for university business and may not be used for personal expenses.

A travel advance must be received in the Travel Office at least 14 calendar days (two weeks) before the departure date. The travel Office cannot guarantee processing if the travel advance request is received late.

The travel Office will process a travel advance and a direct deposit or check will be issued no more than **fourteen** working days prior to the date of departure. Advances must be deducted from the reimbursement request on the travel expense report that is to be submitted no later than 30 days after the travel return date. The reimbursement must be submitted with the same funding source as the travel advance.

Delinquent travel reimbursement requests or other abuses of the travel advance policy may result in the withdrawal of the travel advance privilege. Travelers are notified of outstanding travel advances at 30 days. If no response is received, appropriate Accounts Receivable action will be taken.

SECTION IV: TRAVEL REIMBURSEMENT

Documentation

Specific documentation requirements are listed below.

- Itemized receipts must be electronically submitted to substantiate all costs except those specifically exempted by the [State Budget Manual](#), such as per diem meals, and hereby referenced in this document.
- The documentation provided with the reimbursement request must clearly substantiate the appropriateness and accuracy of the item, the method of payment (cash, cancelled check (front and back), the amount and that the individual paid for the item (if a travel or non-travel reimbursement). Evidence includes original itemized receipts (electronic version is acceptable), hotel bill (if applicable) with a \$0 balance, conference agendas (if applicable), and other documentation appropriate to the situation. If the method of payment is not indicated on the receipt, alternative proof of payment must be provided – such as a bank statement or a credit card statement.

- ProCard or non-travel purchases require an original (electronic version from the vendor is acceptable), itemized receipt to substantiate the charge.
- The documentation must also accurately indicate the times of travel and items submitted for reimbursement must conform to that period.
- Sensitive information (bank account number, routing number, and credit card number- except the last four digits) must be redacted.

Registration

The ECU ProCard is the preferred method for paying registration fees. If the ProCard cannot be used, registration may be paid via Port, or the traveler may pay and request reimbursement in Emburse. If registration reimbursement is requested, please attach documentation of payment such as copy of canceled check, credit card receipt, receipt from conference, etc. with expense form in Emburse. (Redact sensitive information as noted above.)

Fees and Service Charges by Travel Agents

With sufficient justification and documentation along with approval from the department head or their designee, state employees can be reimbursed for usual, customary, and reasonable fees and services charges imposed by travel agents for assistance in making travel arrangements.

Business and Personal Travel Expenses/Extended Stay Travel

There are special reporting requirements when personal and business travel are combined. The traveler should prepare and sign a [Combined Business and Personal Travel Memo](#) (memo), located on the Accounts Payable Website, indicating there are no additional costs to the University for the personal portion of the trip. The traveler must provide documentation (ex. an analysis of expenses breaking out business costs and personal costs) to support the “no additional cost” statement. The supervisor and department head should sign the memo indicating they have reviewed the written documentation and agree no additional costs were incurred by the University because of the extension of the trip for personal reasons. The memo (not the analysis) should be attached to the Emburse expense report, via an upload. The documentation (ex. an analysis of expenses breaking out business costs and personal costs) should be kept on file in the department in accordance with the University’s records retention policy (see page 29) and is subject to review by the Office of Internal Audit and Management Advisory Services, external auditors, Financial Services, and the ProCard Office. If extending the trip for personal reasons costs more, the ProCard cannot be used. The traveler must pay out of pocket and request reimbursement for only the amount the business portion of the trip would have cost had the trip not been extended. Original receipts must be submitted.

Transportation

University travel should be conducted in the **most efficient manner and at the lowest and most reasonable cost to the University**. Often, the most practical mode of travel is by passenger vehicle. Per the [State Budget Manual](#), the mode of travel by passenger vehicle, whether in-state or out-of-state, should be considered in the following order: make use of state term contracts for short-

term rentals ([State Term Contract 975B Vehicle Rental Service](#)) and reimburse for use of personal vehicles on a limited basis and carpool whenever possible.

Duty Station

The employee's department head must approve exceptions to this policy.

The department should keep written documentation of exceptions showing the duty station location, the reason for the exception, and the approval. Once a duty station has been determined, it should be consistently used for all travel. If a duty station changes, written approval and documentation as stated above is required.

Rental Vehicle (commercial rentals)

ECU employees are required to use Enterprise Rent-A-Car for ground transportation needs. Visit Parking and Transportation's Enterprise Rentals website to view the process for obtaining a commercial rental vehicle for ECU business travel. For more information regarding Enterprise and car rentals, please contact Parking and Transportation 252-328-6294.

While Enterprise is the preferred rental company to use, we recognize that special situations/exceptions may require a rental vehicle be obtained from a non-Enterprise rental company. In addition to the reason an Enterprise rental vehicle was not used, the department/traveler should submit a Certificate of Insurance for this vehicle beforehand. Adding a rental vehicle to this policy ensures that we have the proper insurance coverage in case there is a claim. Below is a link to the vehicle rental matrix, the certificate of insurance link is also a part of the matrix. <https://oehs.ecu.edu/university-insurance/> This link is on the Office of Environmental Health and Safety webpage, scroll down to "Rental Vehicles Form: Certificate of Insurance (COI) and Passenger Vans", click on Rental Vehicle Matrix. If you have any questions about this matrix or form, please send them to insurance@ecu.edu.

Pre-approval is required – prior to renting a vehicle, the request must be approved within Emburse and can only be used for university official business. The pre-approval number will be needed in making a reservation. Per the Office of State Budget and Management: "Unless prior approval has been obtained from the department head of his /her designee, the employee shall bear the difference in cost when renting a vehicle from a class that exceeds the cost of a standard vehicle on the state's term contract for short-term vehicle rentals."

No extra insurance or add-ons are allowed – extra insurance add-on is not permitted, (please see vehicle rental insurance information below). Justification is required on the preapproval travel form before renting larger than intermediate/standard class sizes, such as number of passengers, trip duration, or cargo needs. Additional costs are not permitted for any "Add-Ons" Examples include, but not limited to: Satellite Radio, GPS, Luxury Class, and Pre-Paid Fueling.

State Contract for Vehicle Rentals – Traveling employees should seek the most economical rental vehicle available at their destinations-considering type and size of vehicle needed, length of rental, etc. – from among the companies on contract. Always notify the rental company representative that the renter is an employee of East Carolina University, and the rental will be used for official state

business. Always use the State's contract number and ask for the rate applicable to the State's contract whenever making a reservation and/or renting a vehicle for official University business. Departments using travel agencies to make their travel arrangement must ensure the travel agency has and uses this information when making reservations for official University business. Requesting a rate lower than the contract rate may void the State's contract and/or important insurance features that are in place to protect you.

ProCard or Personal Credit Card is Required – The ECU ProCard or a personal credit card is required for payment of rental vehicles. Enterprise requires the driver to show a “credit card” at the time of pick up.

Vehicles to Be Driven by University Employees Only – Driving a rental vehicle on behalf of a university department must be within the scope of work the employee was hired to do for that department. Personal use of a rental vehicle is not permitted, except for rare circumstances, with prior approval by the relevant vice chancellor. When business travel is concurrent with personal travel, the employee may not use the rental vehicle for personal travel. The rental vehicle must be returned or not rented during the personal travel portion of the trip. Students employed by the university may drive vehicles rented by the University while performing duties within the scope of the job for which they are being paid. Students not employed by the University, such as those on scholarship or fellowship or members of university-affiliated groups, are NOT permitted to drive vehicles rented by the university. Visiting Lecturers, Scholars, Scientists and Professors, with or without appointments, and Adjunct and Emeritus Volunteers, persons working for the University, but not receiving a payroll check, may not drive vehicles rented by the University.

Vehicle Rental Insurance Information – Per the North Carolina Office of Budget and Management “No reimbursement will be made for rental insurance purchased. State employees are covered under the State's auto insurance program. However, reimbursement for automobile rental insurance will be permitted for individuals engaged in official business during travel to international destinations.” The State of North Carolina Motor Vehicle Insurance policy insures private passenger rental vehicles up to a value of \$40,000 and rental trucks up to a value of \$60,000 without specifically having to report and add such vehicles to the State of North Carolina Motor Vehicle Insurance policy. However, for any private passenger rental vehicle or rental truck over these values, for any vehicle over 10,000 GVW (gross vehicle weight)/or for any rental of 30 days or more, the traveler should contact ECU Risk Management and Insurance at 252-328-2010 to add coverage for the rental vehicle before renting the vehicle. A Certificate of Insurance Request for a Rental Vehicle must be completed before coverage can be provided. Once the insurance is added, you will be notified, and a premium will be charged to the FOAP specified. For more information, please contact Risk Management and Insurance. The State of North Carolina's motor vehicle insurance policy covers leased vehicles for physical damage in the United States, Canada, Puerto Rico, and territories or possessions of the United States of America. Since the State of North Carolina Motor Vehicle Insurance Policy provides rental physical damage coverage as noted above, this insurance coverage is not required for state employees. The University will not reimburse a traveler choosing to pay for this type of coverage unless the employee is traveling outside of the State's motor

insurance policy coverage territory (United States, Canada, Puerto Rico, and territories or possessions of the United States of America). The University will not be responsible for insurance charges under any other circumstances and reimbursement is not allowed for such charges. Accepting and/or purchasing Personal Accident Insurance will result in an additional fee or surcharge and will be considered personal insurance for the Traveler. Travelers choosing to pay for this coverage will not be reimbursed. Please contact the Office of Risk Management for more information regarding insurance.

Personal Vehicles

The use of personal vehicles should be on a limited basis. Actual mileage is reimbursable when using a personal vehicle on approved travel. Always refer to the [travel rates website](#) for the most up to date rates. In Emburse, simply click on “calculate mileage” and Google Maps is built into Emburse and will calculate the mileage, along with provide a copy of the map for supporting documentation. No reimbursement shall be made for the use of a personal vehicle in commuting from an employee’s home to his duty station unless additional miles are driven to make university business stops while in route to his duty station. Reimbursement will be made only for the extra miles driven. Mileage will be reimbursed for the closer of home or duty station.

If you do decide to utilize your personal vehicles for university travel, please reference the DOI Risk Management policy for driving your personal vehicle which is noted below:

- The State’s automobile insurance will not reimburse individuals for deductibles under their private insurance.
- Individuals who use their personal vehicle for State business on a routing basis should report the same to their insurance company for rating purposes.

Commercial Airlines

The ECU ProCard is strongly encouraged when purchasing airline tickets. If the ProCard cannot be used, in general, airfare is reimbursable when the departure and return dates are within one (1) calendar day of the purpose of travel. Airfare for your travel outside the continental US is reimbursable when the departure and return dates are within a justifiable time around the purpose of the travel.

Travel Class – Air Coach class must be used for all domestic flights, regardless of funding source. Additional fees within the coach class are allowable only when advised by the Office of the ADA Coordinator that such accommodation is necessary. Please contact the Office of the ADA Coordinator directly by email, ADA-Coordinator@ecu.edu, or telephone 252-737-1018 for more information.

Additional Upgrade or other fees will be considered for personal preference or convenience are non-reimbursable and remain the employee’s responsibility. Employees traveling internationally on overseas flights may be reimbursed actual business class, only with written prior approval from the department head, stating “Business Class” is permitted. The assigned seats charge invoked by the

airline(s) will be approved and paid. However, any seat upgrades in way of charge will remain the same and these will not be paid for.

Baggage Fees – Reimbursement for one checked bag will be considered reasonable. Instances where the traveler requests reimbursement for more than one checked bag will require written justification based on the business purpose.

Super Saver Rates – When traveling by common carrier to conduct official state business, employees traveling to their destination earlier than necessary and/or delaying their return to avail the state of reduced transportation rates may be reimbursed subsistence for additional travel days if the amount saved in transportation costs due to the early and/or delayed travel is greater than the value of lost productivity and additional subsistence. The amount of savings must be documented with a statement specifying the amount of funds saved and approved in advance by the department head. The documentation will remain in the department in accordance with the University's records retention policy (see page 29) and will be available upon request.

Frequent Flyer Miles, Points, Rebates, Coupons or Certificates for Reduced Air Fare – The use of the ProCard is strongly encouraged. Any personal benefit (including frequent flyer miles, points, rebates, etc.) earned by a state employee while traveling on state business at state expense are the property of the State and not the traveler. Frequent flyer miles and points accumulated by an individual state employee during previous state business trips should, to the extent possible, be used while traveling on future state business trips. Rebates must be remitted immediately to the department's designated collection point for deposit. Coupons or certificates for reduced airfare, if acquired by a state employee while traveling on state business at state expense, are the property of the State and should be used, to the extent possible, by the state employee on future state business trips.

Insurance – Flight and/or traveler's insurance (including life insurance) is not reimbursable and is not allowed to be charged on the ProCard. With prior approval, medical insurance may be reimbursable for international travel but cannot be paid from state funds.

Other Fees – Only fees that are necessary and have a business purpose will be paid. Fees for personal preference or convenience are the employee's responsibility.

Charter Aircraft

The use of charter aircraft may be approved provided the following is substantiated in writing:

1. A state aircraft is not available or not appropriate for the size of the party traveling or the destination airport.
2. The use of a charter flight is more economical than a commercial flight.
3. The use of a charter flight is necessary because of unusual circumstances and is not solely for the convenience of the traveler(s).

4. The use of a charter flight requires approval in advance by the traveler's vice chancellor, or designee, and the Vice Chancellor for Administration and Finance, or designee. The Director of Athletics must approve in advance the use of charter aircraft for athletics team travel.

Taxis, Private Car Services (ex. Uber), Shuttles and Limousines

The ECU ProCard is the preferred method for payment of taxis, private car services (ex. Uber), shuttles and limousines when practical. The actual costs of fares are reimbursable when required for travel on state business. The traveler should use the most economical mode of transportation.

Rail or Bus

The ECU ProCard is the preferred method for payment when purchasing rail or bus tickets. The actual cost of coach fare for rail and bus service on State or University business is reimbursable when the departure and return dates are within one (1) calendar day of the purpose of travel. Additional fees within the coach class are allowable only when advised by ADA that such accommodation is necessary. Please contact the Office of the ADA directly by email, ADA-Coordinator@ecu.edu, or telephone 252-737-1016 for more information. Other fees will be considered for personal preference or convenience and remain the employee's responsibility.

Parking Fees, Tolls, and Storage Fees

Parking fees, tolls and storage fees can be paid with the ECU ProCard when practical and/or are reimbursable when incurred while traveling on official state business. Any parking rates considered excessive and only for the convenience of the traveler will not be reimbursable. For example, excessive or inappropriate parking would be the use of the airport's hourly parking lot for an overnight trip. Economy lots must be used when parking at airports during travel days.

Subsistence (Lodging and Meals)

To be eligible for allowances while in travel status, the employee must be acting in an official capacity as required by his/her work activities and the travel destination must be at least 35 miles from the employee's duty station or home, whichever is less. This thirty-five-mile limitation is defined as a thirty-five-mile radius from the city limits or boundaries of a town, village, or home, whichever is less. Subsistence rates are established by the State. Separate rates are established for in-state travel and out-of-state travel. Out-of-state travel status begins when the employee leaves the State and remains in effect until the employee returns to the State. However, in-state allowances and reimbursement rates apply when employees and other qualified official travelers use hotel and meal facilities located in North Carolina immediately prior to and returning from out-of-state travel during the same travel period. Always refer to the [travel rates website](#) for the most up to date rates.

Lodging

The payment of sales tax, lodging tax, local tax, or service fees applied to the cost of lodging is allowed in addition to the lodging rate and is to be paid as a lodging expense. When the lodging is less than the established expenses rate, the maximum amount reimbursable will be the actual paid amount charged. When an employee stays or has meals in a state-operated facility, and the subsistence (meals and/or lodging) charge is less than the established rate, the maximum amount

reimbursable will be the amount charged. Lodging expenses are not reimbursable unless the travel destination is at least 35 miles from the employee's duty station or home, whichever is less. With prior approval, excess lodging is allowed when the employee is in a high-cost area and unable to secure lodging within the current allowance, or when the employee submits in writing an opinion that his/her personal safety or security is unattainable with the current allowance. **Excess lodging is not allowed for reasons of convenience or personal preference for the employee.**

Meals

Meals will not be reimbursed for one-day trips, except when it is pre-planned as part of the meeting and included in the registration fee. Such fees must not consist exclusively of meals and will not be reimbursed.

For overnight travel, expenses for meals are reimbursed based on a **per diem** amount and excess costs may not be paid from state, auxiliary or grant funds unless there are predetermined charges, or the meals were for international travel. Always refer to the [travel rates website](#) for the most up to date rates. Meal rates, domestic and international, include taxes and tips. Other funding sources may allow the traveler to exceed per diem rates, but itemized receipts are required, and tips are allowed up to 20% of the total cost (food, drinks, and tax). **Excess reimbursement for meals must be approved by the Department Head at the time the travel is authorized.**

No meals can be pre-paid for by the University unless they are included in a registration fee and a meeting is involved.

An employee may be reimbursed up to the allowable subsistence breakfast expense rate for breakfast even if their lodging establishment offers a free continental breakfast or if a continental breakfast is included in the registration/meeting fee. However, if brunch is included in the registration/meeting fee, reimbursement for lunch will not be allowed.

No payment for meals is allowable at an internal conference unless overnight travel criteria are met.

Employees may be reimbursed for meals for partial days of travel when in overnight travel status and the partial day is the day of departure or the day of return. The following applies:

- Breakfast: depart duty station or home, if closer to the destination, prior to 6:00 a.m.
- Lunch: depart duty station prior to Noon (day of departure) or return to duty station after 2:00 p.m. (day of return).
- Dinner: depart duty station or home, if closer to the destination, prior to 5:00 p.m. (day of departure) or return to duty station after 8:00 p.m. (day of return)
- The travel must involve a travel destination located at least 35 miles from the employee's regularly assigned duty station (vicinity) or home, whichever is less.

Meals that are a part of a registration and/or tuition fee must be excluded from the subsistence expense on the travel reimbursement, even if the traveler did not participate.

Employees can claim reimbursement for meals even though they are shown and offered as a part of one's flight schedule on a commercial airline.

Business meals for university employees that are clearly related to an external client or candidate may be paid only from **non-state funds**. Meals only with other University employees must be paid for from personal funds.

No alcoholic beverages or related tips or tax are reimbursable from state, auxiliary and grant funds.

Unless the sponsor guidelines are more restrictive, state rules and guidelines shall take precedence over sponsor guidelines on the use of sponsor grant funds, unless specifically exempted in advance by the Office of State Budget and Management (OSBM). When approved by OSBM, in the case of international travel, the federal per diem rate shall be the maximum amount allowed. For all grant travel, the most restrictive policy (state or sponsor) will be applied.

Other Travel Expenses

Tips and Gratuities (Non-meals)

Reimbursable gratuity or tips must be considered reasonable for items that are not already covered under subsistence. Excessive tips will not be reimbursed. A reasonable tip would be one that a prudent person would give if traveling or conducting personal business and expending personal funds.

The following information is provided when calculating a tip:

- Airports: Baggage Handling/Skycaps = no more than \$2 per bag; Driver of Free Shuttle = no more than \$2 per bag.
- Parking/Auto Related: Valets = \$2 per car when collecting the car; Paid Taxi (and Similar) Drivers = 15% of the base fare and \$1 to \$2 per bag.

Telephone Calls and Internet Access

Business Calls – Official business calls are reimbursable with documentation.

Allowable Personal Calls – Employees are not allowed to charge long distance, personal phone calls to the University except employees may use the state network system or state credit card for a personal long-distance call(s) if such call(s) is/are of an emergency nature as determined by the department. An example is a call made when an employee calls home to inform someone that the travel period has been extended beyond original plans due to unforeseen reasons. Other personal long-distance telephone calls are not allowed unless the traveler is out of the continental United States. An employee who is in travel status out of the continental United States for two or more consecutive nights in a week is allowed one personal long-distance telephone call for each two nights. Reimbursement is limited to \$5.00 for each call. **Documentation is required for reimbursement.**

Use of Telephone with Computer Hook-ups – An employee who is in travel status who needs to transmit data electronically (including email) or use the Internet for business purposes should use

the most cost-efficient manner available. **Documentation of internet charges is required for reimbursement.**

Passports

Reimbursement for costs incurred in obtaining or renewing a passport may be made to an employee who, in the regular course of his duties, is required to travel overseas in the furtherance of official business. Passport expenses are chargeable to the same fund that supports the employee's trip.

SECTION V: TRAVEL TYPES

External Conference

External conferences involve the attendance of persons other than the employees of a single state department, institution, or agency. Payment for meals is allowable if included in the registration fee, but such fee must not consist exclusively of meals, or it will not be allowed unless meeting overnight travel criteria. The registration fee is typically made for defraying the cost of speakers, building (room) use, handout materials, breaks and lunches at conferences and conventions.

Requirements/Limitations

Conferences sponsored or cosponsored by the University are authorized when they meet the following requirements/limitations.

- The conference is planned in detail and in advance, with a formal agenda or curriculum.
- There is a written invitation to participants, setting forth the calendar of events, the social activities, if any, and the detailed schedule of costs.
- Whenever feasible, assemblies should be held in state facilities. Non-state facilities may be rented.
- Registration fees may be charged by the sponsors to participants. Registration fees may not include costs of entertainment, alcoholic beverages, setups, or flowers and/or promotional (gift) items if state funds are to be used.
- Sponsors may provide refreshments for “coffee breaks” subject to the limitations of the [State Budget Manual](#).
- When assemblies are to be held under the sponsorship of the University in which the funding for all participants is budgeted, lump-sum payments to a conference center or an organization may be made upon written authorization from the department head or their designee. The authorization must provide:
 - The purpose and duration of the conference.
 - The number of persons expected to attend.

- The specific meals to be served at the conference (law prohibits lunches being provided to state employees unless registration fees are charged to all attendees).
 - The approximate daily subsistence cost per person for the duration of the conference.
 - The name of the conference center, hotel, caterer, or other organization providing the service.
- Payment for meals is allowable if included in the registration fee, but such fee must not consist exclusively of meals, or it will not be allowable unless meeting overnight travel criteria.

It is the responsibility of the departments to ensure that reimbursement for meals included in the lump-sum payment is not also included in reimbursement payments made to employees who are conference participants.

Internal Conference

Internal conferences are those that involve the attendance of employees within that department, institution, or agency only.

Requirements/Limitations

Internal conferences are authorized when they meet the following requirements/limitations:

- The conference is planned in detail and in advance, with a formal agenda or curriculum.
- There is a written invitation to participants, setting forth the calendar of events and the detailed schedule of costs.
- No excess travel subsistence may be granted for internal departmental meetings, conferences, seminars, etc., and such meetings must be held in state facilities when available. No registration fee may be charged.
- Sponsoring departments may provide refreshments for “coffee breaks” subject to the limitations of the [State Budget Manual](#).
- Low-cost conference items are intended to promote employee recognition, improve moral and appreciation, communicate agency contact information when compared to more expensive pay and salary adjustments, are permissible if they are infrequent, prudent, and reasonable in their scope.
- A department cannot use state funds to provide promotional or gift items to be distributed at the conference.
- A department cannot use state funds to support or underwrite a rally, celebration, reception, employee appreciation activity, or similar function.

- A department cannot use state funds to support or underwrite a meeting, assembly, conference, seminar, or similar function by whatever name called that promotes any cause or purpose other than the mission and objective of the department and the University.
- No payments for meals are allowable from any funding source unless overnight travel criteria are met.

Exclusion

An internal staff meeting or any other routine, regular meeting is not an internal conference. No payments for meals or coffee breaks are allowed from state, auxiliary or grant funds. Employee appreciation and staff development functions are not internal conferences. These should occur infrequently and may be paid from sources exclusive of state, auxiliary and grant funds if approved by the appropriate vice chancellor or designee.

Training Session

Employee training involves courses that further develop an employee's knowledge, skill, and ability to perform the duties of his/her present job, such as courses on computer usage or management skills development. These courses have a set fee, are of short duration, and are not part of a curriculum the employee is participating in leading to an educational degree.

Requirements/Limitations

- Departments sponsoring training sessions may provide refreshments for "coffee breaks" subject to the limitations of the [State Budget Manual](#).
- Departments may reimburse employees for training books and materials related to training sessions, provided those books are required to participate in the training sessions. These books are considered property of the University and not the individual property of the employee.

Management Retreat

A management retreat is a meeting or series of meetings consisting of a department or division head and their top assistants and coworkers. Retreats are sometimes held at a site other than the usual workplace and are held no more than once a year.

Requirements/Limitations

Only the Chancellor may authorize an annual management retreat. Expenditures are permissible in a manner as if it were an internal conference.

Blanket Travel

Blanket travel Pre-Approvals should be set up at the beginning of the fiscal year or as soon as it is known the traveler needs to have blanket travel set up. Keep in mind that the Preapproval will encumber the department's budget. Blanket travel is for trips that are repetitive and do not involve an overnight stay. Requests can cover travel within the state and surrounding states. Only mileage,

gas, parking, and tolls are allowable expenses on blanket travel. Blanket travel is only for employees, graduate students, and under-graduate students.

June blanket travel is due earlier than end of month in July because of closing out prior fiscal year blanket requests. This date changes yearly and is communicated to the preparers in June each year.

International Travel

Prior to international travel, it is recommended that you visit the [Office of Global Affairs International Travel Information website](#)

Please check the [US Department of State website](#) for current travel advisory levels.

Non-State Employee Travel

Persons traveling on university business who are not state employees must follow the [Reimbursable Travel for Non-State Employees PRR](#) and the same state and university travel regulations as employees of the State. Non-state employees include, but are not limited to, members of the Board of Trustees, research collaborators, prospective professional employees, spouse/partner/dependent (when appropriate), attendants of handicapped University employees, and volunteers traveling on official University business. Non-state employees must use a [Manual Travel Authorization/Reimbursement for Travel Form](#).

Hotel lodging and transportation such as airline, train, mileage, or bus expenses can be paid using the ProCard. Non-state employees who purchase their own transportation tickets and make their own lodging arrangements must submit the original receipts for reimbursement. Reimbursement for transportation expenses and per diem for subsistence is at the appropriate expense rate. For example, use the in-state rate when the expenses are incurred in North Carolina. Use non-employee expense codes.

Prospective Professional Employees, including Faculty Candidates

- Only the first visit for a Prospective Professional Employee can be paid via state, auxiliary and grant funds.
- State, auxiliary and grant funds cannot be used on the second visit.
- Prospective professional employee's spouse/partner/dependent travel expenses, (and children travel expenses, with the approval of the appropriate vice chancellor), may be reimbursed for one visit, subject to the limits as specified in this manual for non-employee travel. Reimbursement may only be from unrestricted non-state funds that permit this type of expense. A separate Banner ID and travel request for the spouse/partner is required only if the spouse/partner will be reimbursed. With the appropriate vice chancellor's approval, prospective employee's children travel expenses may be reimbursed (from non-state funds) for one visit. Request for children travel expenses reimbursement will be approved only under exceptional circumstances.

- Subsistence at per diem for only 2 nights/3 days (4 nights/5 days if one of the days is a Saturday and 4 days/3 nights if travel begins on Sunday.)
- Transportation costs may be reimbursed.
- All receipts must be original and submitted with packet.
- The unit head or their designee may approve excess travel.

If other funding sources are available, check with the appropriate budget authority regarding what expenses may be paid from those funds.

Meals are allowed at the appropriate rate and limited to the per diem rate. Meals provided and paid for by ECU Faculty/Staff during their time interviewing are not included in the reimbursement to the candidate.

Guest Speakers

Guest Speakers' travel can be processed by contract using a Contractual Services Payment Request (CSPR) form or using a [manual travel reimbursement form](#).

Contractors

If original, itemized receipts are received, process the travel using a manual travel form. If original, itemized receipts cannot be provided, please use a non-travel form for reimbursement. (ex. CSPR or PORT PO). A manual travel reimbursement form will be filled out and held in the department file until the non-state employee has submitted all receipts so that it can be completed. Do not have the traveler sign until it is completed. Inform the traveler that original receipts are required as soon as possible to meet the reimbursement deadline. Email or fax to the traveler the completed travel reimbursement form for approval and signature. The Travel Office will accept a scanned or faxed signature from the traveler. All other approval signatures should be original and signed only after the traveler has signed.

SECTION VI: SPENDING ALLOWANCE

For those reimbursements with set limits/allowances and/or spending caps, the following steps will be used in Emburse.

An example of this would be when a department agrees to only pay \$2000 for conferences for Employee X. If Employee X spends \$2400 for a conference, the department will only approve to reimburse Employee X for \$2000. (Even if the actual expenses and attached receipts are \$2400).

Please add a comment that the department has set a limit/allowance/cap for this expenditure.

Pre-Approval – Amounts will only be what the cap is set for (knowing that actual expenses will exceed this limit). All costs exceeding will not be reimbursed and will be personally liable.

- If using the above example, the pre-approval would be for \$2000, not \$2400. The \$2000 can be put into one category, i.e., Airfare, Hotel, etc.

Travel Expense Report – Only expenses up to the limit will be listed on the expense report.

- If using the above example, receipts will show \$2400 but the expenses listed on report will only add up to \$2000. If any adjustments to one expense to make \$2000, but the “partial” amount. (Example, Hotel bill is \$2500, receipt will be \$2500, but put \$2000 on Expense Report)
- The “Total Pay Me Amount” on the left side of the expense report should only be for limit/allowance/cap. This ensures there is not an overpayment.
- For any “ProCard” prepaid expenses, i.e., registration make sure to count that in the total expense allowance, even if made by another ProCard holder and expenses earlier.

SECTION VII: CANCELLED TRAVEL

When a traveler must cancel his/her trip, the travel pre-authorization (encumbrance) must be liquidated in Emburse. Go to the respective traveler’s approved Preapproval in Emburse, open report and hit “EXPIRE” as this will release the encumbrance back into the department’s budget.

A letter of justification should be retained in the department along with any travel-related documentation. It should reflect the reason for the cancellation and all documentation showing cancelled registration and airline has been completed. Penalties and charges resulting from the cancellation of travel reservations (including airline, hotel, or other travel reservations and conference registration) shall be the department’s obligation if the employee’s travel has been approved in advance and the cancellation or change is made for the convenience of the department. To capture the cancellation fees, a Travel Expense report is required to have those charges expensed properly. If the cancellation or change is made for the personal benefit of the employee, it shall be the employee’s obligation to pay the penalties, charges, and any rebooking fees. However, in the event of accidents, serious illness, or death within the employee’s immediate family or other critical circumstances beyond the control of the employee, the department may pay the penalties and charges.

Changes or cancellations resulting in a refund, or a lesser charge are to be returned/deposited into the account from which the expense was originally charged. Refund checks should not be sent to the Travel Office. Refunds must be directed to the traveler’s contact person for deposit to the appropriate funding source where the prepayment originated. Refunds sent to the Travel Office will be sent to the University’s Cashiers Office.

Pre-Paid Fees for Cancelled Trips

Registration – If the registration was paid by a University ProCard, the department must make every effort to obtain reimbursement. There may be fees associated with cancellations. If the conference offers a partial refund, the refund should be applied to the ProCard used. If a refund is issued by check, request that the check be mailed to the department and deposited promptly against the FOAP used to pay the fee. The conference may offer credit toward another conference or next year's conference attendance. If so, documentation should be maintained, and the credit should be used at the first available opportunity. If the conference refuses a refund or credit toward attendance at future conferences, the department must have proper documentation in the travel file in the event of an audit.

Airline Ticket – it is strongly encouraged that a ProCard be used to purchase all airfare tickets. If an airline ticket has been purchased using University funds and the traveler must cancel the travel, the purchaser must notify the airline immediately, and request a refund or credit. If credit is obtained, request documentation for file. Any credit should be used at the first available opportunity. If a cancelled airfare is being used to book another trip for the traveler, the airline will normally charge a fee for rebooking. The rebooking fee is allowed on a university ProCard unless the cancelled airfare was for the employee's convenience. The prior flight information should be attached to justify the rebooking fee charges.

Travel Advances for Cancelled Travel

If a Travel Advance has been prepared for or requested for a traveler and the travel is cancelled, you will need to contact the Travel Office immediately. If the funds have not been released, the Travel Office will cancel the advance. In the event the travel advance has been issued to the traveler, the traveler should reimburse the University immediately (within one business day of cancellation notification). Contact the Travel Office for instructions on how the reimbursement should be processed.

SECTION VIII: TRAINING

How-To-Guides – paper: These paper guides are located on the home page of Emburse. Upper right-hand side Quick “HOW TO GUIDES” These guides show, step-by-step, how to perform a specific function in Emburse.

How-To-Guides – video: The videos take the paper guides and demonstrate, on video, how to do each function in Emburse.

Interactive training: Monthly training is provided by Accounts Payable and is open to any preparer/traveler/cardholder that needs assistance with any topic in Emburse. The purpose of these sessions is to briefly review a specific topic that most users may be having questions about. It also

serves as an open forum for any Emburse related questions. Times and dates can be seen on the Emburse Home Page, along with the link.

SECTION IX: EXCEPTIONS

On occasion, a department may need an exception to one or more sections of the manual because of the unique circumstances of departmental travel. The exception must not violate state or federal law. Exceptions must be requested in writing, describe the unique circumstances of the department's travel, and be approved by the department head, the appropriate Vice Chancellor and the Vice Chancellor for Administration and Finance (or the VC of Admin & Finance designee). A copy should be provided to the Travel Office.

Grant Funds

Travel paid from grant funds will normally follow University policies and should comply with sponsor regulations and policies. Occasionally a grant fund may have more restrictive travel guidelines. In the event of a conflict between sponsor and University policy, the most restrictive policy/practice will apply. The Office of Research Administration (ORA) must approve all exceptions.

U.S. Flag Carrier Service and Fly America Act

U.S. Flag Carrier Service and Fly America Act, 49 U.S.C. 40118, enacted by public law 95-473, known as the Fly America Act, requires travelers whose air travel is being financed by the U.S. government (direct Federal funding, Federal flow-through funding, etc.) to use U.S. flag air carrier service for all air travel (domestic and international) when available.

The exceptions are:

1. When a U.S. air carrier is not available.
2. When the use of a U.S. carrier service would extend travel time by 24 hours or more.
3. When a U.S. carrier does not offer nonstop or direct service between origin and destination; and:
 - a. Increases the number of aircraft changes outside the United State by two or more.
 - b. Extends travel time by at least six hours or more.
 - c. Requires a connecting time of four hours or more at an overseas interchange point.
4. Short Distance Travel – When the flight time from origin to destination is less than 3 hours and the use of a U.S. flag carrier doubles the time end-route.
5. When there is an applicable Open Skies agreement in effect which the Department of Transportation says meets the requirements of the FAA.

The Code of Federal Regulations (CFR) Title 41, Subtitle F Part 301-10.131 through 301-10.143 - Transportation Expenses define U.S. flag air carrier service and provide specific exception criteria for the use of non-U.S. flag air carrier service. (<https://www.ecfr.gov/current/title-41>)

An Open Skies Agreement is transportation provided under a bilateral or multilateral air transport agreement, to which the U.S. government and the government of a foreign country are parties, and which the Department of Transportation has determined meets the requirements of the Fly America Act. There are currently four bilateral/multilateral “Open Skies Agreements” (U.S. Government Procured Transportation) in effect, (see the U.S. General Services Administration website. - <https://www.gsa.gov/policy-regulations/policy/travel-management-policy/fly-america-act>)

Information on the four Open Skies Air Transportation Agreements and other air transport agreements are located on the U.S. Department of State website. - <https://www.state.gov/open-skies-partnerships-expanding-the-benefits-of-freer-commercial-aviation/>

Please consult with ORA in advance of booking any international air travel to avoid any potential issues and/or disallowed costs related to the Fly America Act.

Late Travel

As discussed in the Travel PRR, reimbursement requests received in the Travel Office more than 30 days after the return date of the trip are considered late unless the travel is for an approved exception listed below. Late travel requests will automatically route to the traveler’s respective Vice Chancellor and no additional memos are required.

Other requests for reimbursement received more than 30 days after the last day of travel will be considered only when extenuating circumstances exist that are beyond the control of the traveler that prevent the traveler from complying with the 30-day requirement. (I am too busy, receipts were misplaced, other work-load priorities, etc. are not extenuating circumstances.) The respective Vice Chancellor must approve the request. These travel requests cannot be paid for by state funds.

Requests received by the Travel Office more than 120 days after the last day of travel will not be paid.

SECTION X: MISCELLANEOUS

Records Retention

The University’s Records Retention and Disposition Schedule is maintained by [ECU Records Management](#) in Joyner Library. In general, original travel requests, authorizations, and reimbursement files may be destroyed after 3 closed fiscal years and when released from all litigation, claims, audits, or other official action involving the records. Questions may be addressed to recordsmanagement@ecu.edu.

Banner ID

A Banner ID number is not required for a prospective employee's first visit or for a non-employee traveling for a one-time visit that will not otherwise involve payment. These payments are treated as one-time pays. If a prospective employee makes a second visit, a Banner ID is required. If the traveler does not have a Banner ID, request one following the appropriate instructions on the [ECU Office of Supplier Management website](#). On the manual travel form, insert "one-time pay" in the field where you would enter a Banner ID #. For each candidate visit, please add a comment regarding which # of visit – ex: 1st visit, 2nd visit, etc.... Send questions to ECU-SUPPLIERMGMT@ECU.EDU or call 737-5325.

SECTION XI: TERMINOLOGY

Approval Delegate – A Emburse term for an employee who has been given the responsibility to approve reports for another approver who happens to be out of the office

Attachments – documents pertaining to the reimbursement. Such as registration documents, transportation documentation, taxi/shuttle receipts, baggage receipts, hotel receipts, agenda, etc.

Authorizer (for manual travel) – one (or more) person with the authority to approve the traveler's absence from the University and participation in official University business.

Blanket Travel – mileage, gas, tolls and/or parking within one day of travel. Blankets are only used by employees and graduate students. May cross state lines.

Budget Authority (for manual travel) – one (or more approver) with the authority to access funding and reimburse expenses to the traveler.

Delegate – an employee that can prepare a Preapproval/Expense Report on behalf of another employee in Emburse.

Duty Station – defined as the location where the employee is assigned to. Usually, an employee's duty station is their university office or clinic.

Employee In-State Travel – designated for travel within the State of North Carolina including travel immediately prior to leaving the State.

Employee Out-of-State Travel – assign this distinction when the traveler is leaving the State of North Carolina but remaining within the United States.

International Travel – used when the traveler is leaving the United States. Although United States Territories, the following destinations are considered international travel for the purposes of assigning the correct signatures, Puerto Rico, and Northern Mariana Islands

Non-Employee – any traveler that ECU is reimbursing for travel that is not on ECU's payroll. Examples of non-employees include prospective professional employees and speakers. Should use the non-employee travel codes instead of employee travel codes

Original Receipt – An original receipt is a document issued by a vendor, detailing the cost for each good or service provided. The receipt must indicate the name of the vendor, the date of the transaction, and the method of payment (cash, check or the last four digits of a credit card). Electronic receipts from the vendor are acceptable.

Preparer – one who initiates the travel request that is trained to uphold the rules and regulations of the State of North Carolina and the University regarding travel related reimbursements.

Signatures (for manual travel) - must be assigned to authorizers that have the authority to sign and grant reimbursement. Emburse records an electronic signature via an electronic approval.

Study Abroad – travel reimbursements used only by the Office of Global Affairs.

Traveler – one that represents the University in an official capacity and on official University business.

SECTION XII: APPENDICES

Appendix A: Clarification of Lodging Options

Type of Lodging Establishment	3 rd Party Lodging?
Hotel/Motel	No
“Serviced” Apartments – apartment style accommodations but operated in a comparable manner as a hotel (e.g., Marriot Residence Inn, Extended Stay America)	No, but institution should consider cost
Time Shares – Apartments or Condominiums owned by an individual or the resort company available for sublet (may or may not require lease agreement)	Yes
Campgrounds/Conference Centers – cabins, villas or bungalows owned and operated by a private company or nonprofit (e.g., 4-H; usually handled in the same manner as a hotel reservation, typically daily or weekly rates)	Yes
Tourist Homes – Apartments, homes, beach cabins, etc. owned by an individual rented through a “Vacation Rental” type book agency (usual require lease agreement)	Yes
Private Residence – house, cabin or apartment owned by an individual and available for lodging via a lease agreement	Yes
Campus Dormitory (e.g., when a professor stays in a dormitory as part of a study abroad arrangement)	No

Appendix B: Characteristics of Third-Party Lodging Establishments

Category	Hotel	3rd Party Lodging Establishment
Lease Agreement	Not required	Usually, but sometimes a pre-registration/rental agreement is used instead
Cleanings	Daily (included in price)	Usually not included in price; but cleaning fee is often a required additional charge
Security Deposit	Not required	Usually required
Utilities	Included in Daily Rate or Surcharge	Usually included in rate, but specified in rental agreement if not
Rate	Daily	Usually weekly or monthly; when daily rate is available rate is often higher than weekly or monthly rate
Minimum Stay?	Not required	Often required