July 2014 CATS
Complicated Travel Q&A

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Q#1 – FACULTY TRAVEL

Apartment rental versus hotel: A faculty member is doing research in summer and wishes to sublet an apartment (rent + utilities) rather than stay at a hotel. Can this be reimbursed through Travel?
Answer #1: YES (in certain conditions)

- Travel period must be 8 weeks or less
- Requires rental agreement (between traveler and landlord – NOT IU)
- Requires proof of payment (NOT CASH)
- Rent only reimbursed through Travel; utilities NOT payable through Travel
Answer #1: NO (in other conditions)

Policy FIN-ACC-I-610 “Allowable Travel Payments to Faculty Members on Leave” applies when length of travel is greater than 8 weeks.

Payment through HRMS Supplemental Pay “Displacement Allowance” better option for longer travel periods (does not require receipts, gets funds to employee sooner)
Q#2 – NON-EMPLOYEE TRAVEL

Multi-legged trip: A guest speaker is coming to IU as part of a multi-destination trip during which she will speak at other universities. How do we determine IU’s portion of the travel expenses?
Answer #2:

- BEST for traveler to buy her own ticket
- Logic #1: For a simple speaking tour, split the airfare evenly between the universities
- Logic #2: For more complicated situations, such as a personal travel leg, the department should obtain a quote for a comparable 30-day-in-advance, economy class, round-trip ticket. IU will reimburse the quoted amount pertaining to the IU business travel only.
Q#3 – STUDENT GROUP TRAVEL

New faculty-led study abroad program: *What is the best way to make group travel arrangements for the faculty leader + 15 students?*
Answer #3:

- Best option: Pre-pay for all student travel against the group leader’s Trip ID #
- Only if there is no IU faculty/staff group leader might you need to create Trip IDs for the individual student travelers (RARE).
- Second option: Contract with a third party travel planner, which may be Travel, may be Purchasing (Matt Estell) – START EARLY FOR 3RD-PARTY CONTRACT
Q#4 – INDIVIDUAL STUDENT TRAVEL

Should individual student research travel be paid through Travel or SIS?

Answer: SIS – exceptions very rare
Q#5 – INDIVIDUAL STUDENT TRAVEL INTERNATIONAL

Does ALL individual student travel overseas require prior approval from the Office of Overseas Study?
Answer #5:

Policy INT-03: Overseas Study Program Development

Policy INT-04: Student International Travel Safety

Inside IU: Faculty, staff: President McRobbie wants you to review the rules for overseas study (February 2014)
Answer #5:

TIER I: Faculty/Staff-led group travel – REQUIRES APPROVAL

TIER II: Individual student traveling with and under the supervision of IU Faculty/Staff member – REQUIRES APPROVAL – SHORT FORM
Answer #5:

TIER III: Individual student traveling alone (even if encouraged by IU faculty member or using IU funds) – APPROVAL TYPICALLY NOT REQUIRED

* waiver required if US State Dept warning
** additional paperwork required if CUBA
Questions?