



Travel and Expense Guidelines and Reminders

Purpose: To aid travelers, delegates, and approvers in preparing and approving TAs and expense reports

*NOTE: TAs are required for both in-state and out-of-state travel; International travel requires additional steps and should follow [UGA's International Travel Procedures](#)

Name: _____

City, State, Country Visited: _____

Dates of Travel: _____

Name of Conference/ Trip: _____

Purpose*: _____

*Attach a note with more explanation if there are unusual charges.

Find the per diem rates here: <https://www.gsa.gov/travel/plan-book/per-diem-rates>

Exceeding per diem example justification: For lodging: Include in a word document the name of the conference or trip, the date, and a justified reason. Examples of justified reasons include: The hotel chosen was included as part of the conference package; the UGA hotel was used (UGA Hotel is normally first choice); hotel prices were high because of an event; or our regularly used hotels in the area had prices exceeding the per diem and there were no other reasonable options available.

Travel Expense Checklist

- Registration (can be reimbursed prior to travel)
 - Include a copy of the meeting agenda
 - Attach a letter of justification if registration includes membership
 - Include a breakdown of what is included in the rate (meals, lodging, travel allowance...)
- Airfare (can be reimbursed prior to travel)
 - Attach boarding pass (even if you have been reimbursed already)
- Lodging
 - Costs for rooms can now be entered as one line item instead of entering per day. Use the new "Number of Nights" field to enter the number of nights per lodging receipt. Costs on the lodging receipt, such as wi-fi, will still need to be entered separately.
 - Attach itemized lodging receipt that is clearly labeled and easy to read
 - If the purpose of the receipt is not clear attach a note
 - If a deposit is required attach proof it was paid (ex: bank or credit card statement)
 - In state travel needs to be tax exempt. If you fail to get the tax removed you will not be reimbursed for that portion of the cost. Use the following Tax Exempt Form and Hotel Excise Form while traveling in state:
 - <http://www.libs.uga.edu/staff/forms/taxemptform.pdf>
 - <https://busfin.uga.edu/forms/salestax.pdf>
 - Hotel costs that exceed federal per diem must be justified (see example justification above; note that all justifications can be submitted as one document)
 - Attach a travel distribution form for payment to a vendor (include hotel, rental car, air, etc.)

- Mileage
 - Find the current reimbursement rate here: https://busfin.uga.edu/accounts_payable/mileage_reimburse/
 - Use actual location departed from on expense report
 - Mileage needs to be deducted for any trip the employee leaves or returns on a work day (regardless of time of departure or return)
 - Deducted Commute Miles: _____
 - Attach map quest, google maps, etc.
 - Justification required if a personal car was used when a state car is available
- Miscellaneous expenses
 - Include on travel expense statements
 - Use D-Misc for domestic travel and I-Misc for international travel
 - Include the name, business purpose and account for the item
 - Attach a clearly labeled receipt
- Meals
 - Per diem cannot be used for any meals provided by a meeting, conference, or hotel even if the traveler decides not to eat the provided meal
 - Exceptions require a written justification and are limited to dietary or timing issues
- Group Travel
 - A travel distribution form should be attached to the travel expense statement as well as broken out by person within the system
 - For group meals attach a group meal form and attach expenses (broken down by person)
 - Include a breakdown of entertainment costs such as a dinner to interview job candidates
 - List travel expenses for students who are not employees
 - Include breakdown of entertainment expenses