

# University of Texas travel rules

Going on a school or job related trip?

Updated 06/27/2018

1. **Request for travel authorization (RTA).** File a RTA before the trip. UT will not make any arrangements or reimburse any money without an RTA filed before the travel. For business/school travel, you should file a RTA even if another entity is paying for your trip.
  - a. A basic RTA includes the traveler's name, dates of travel, overnight destination(s), reason for travel (conference, talk, etc.), and an account to be charged.
  - b. See Kim to submit an online RTA request.
  - c. You (not Kim) will receive a confirmation email when your travel is approved.
  
2. **For Postdocs, grad students, and staff.** UT rules allow reimbursement or payment of tickets, ground transportation, food, lodgings, and registration, but you need permission from your PI to reimburse some or all of these funds. If they will pay for registration and tickets, please don't assume you should also submit all your meals and other expenses. Ask what expenses they are willing to cover. Historically, for most trips the PI's will cover registration, airline, and lodgings. They sometimes cover ground transportation and rarely reimburse food.
  
3. **Plane ticket purchase.** You may purchase plane tickets from online sites, Concur, or use UT travel agencies such as Anthony Travel.
  - a. Kim can contact Anthony Travel with your preferred flights or you can let them suggest flights. You will have final approval before any tickets are purchased. To use Concur (accessed through the [UT Travel Management](#) website), you will need to set up an account. Tickets purchased through the travel agencies can be billed to university accounts without the need to submit reimbursements. Tickets with the travel agencies and Concur will also not charge fees if you need to modify your flights, but there are agency service fees for purchasing tickets.
  - b. If you purchase tickets yourself, you must complete the travel before submitting receipts for reimbursement. The receipt should also have the phrase "Online selection is best value as consistent with institutional priorities."
  
4. **Rental cars.** UT has large discounts with many rental car companies and these discounts codes can also be used for personal use. The companies and discount codes can be accessed through the [UT](#)

[Travel Management](#) website. Please pay attention to the company rental restrictions (there are many) before booking a car.

- a. You can make rental car reservations with Avis, National, and Enterprise and have them direct billed before your travel. Direct-billed rental cars must be made with one of the UT Austin contract vendors and using the discount code. See Kim about direct billing a rental car.
- b. Reservations with Budget and Hertz can be reimbursed after travel. You should also use the discount codes with these companies.
- c. For Texas rentals, use the “Vehicle Rental Tax Exemption” certificate to eliminate some of the rental tax.

5. **Lodging during travel.** All lodging must be paid from personal funds and reimbursed after the travel. UT will not direct bill or prepay for any hotels. There is one rare loophole to this – see the section on conference registration.



- a. When staying in Texas hotels, you should not be charged any Texas state occupancy tax or Texas sales tax on resort fees. There are separate forms for exempting both of these taxes. The filled and signed forms should be presented upon checking into the hotel.
- b. Use “Hotel Occupancy Tax” form and “Sales Tax” certificate when staying in Texas hotels.

6. **Meals.** Like lodging, you should pay for any meals during your travel and get reimbursed when the travel is completed. You must save all itemized receipts. Do not save just the credit card receipt with the total amount.



- a. Be aware of alcohol restrictions from some organizations. More often they tend to be universities, but some places will not reimburse alcohol or even reimburse any meals when alcohol is on the receipt.
- b. With UT, you are allowed to purchase alcohol with meals when traveling, but do not purchase only alcohol on a receipt and expect to be reimbursed.

7. **Conference Registration.** UT rules prohibit travel from being charged to regular university credit cards, but conference registration is the exception. Sometimes the registration and lodgings are bundled together in the same charge, but the phrasing on the receipt determines whether you can charge the lodging too.



- a. You may charge registration to a UT credit card if the receipt lists the “conference name/registration.”
- b. If the receipt lists “conference name/registration,” only and the lodging is included (not mentioned on the receipt) it can be charged to the UT credit card.
- c. If the receipt lists “conference name/registration” and “lodging,” you can only charge the registration portion of the bill. If the organizers will not split the bill, but want to charge registration and lodging together, you will have to pay with personal funds and get reimbursed after travel.

8. **International travel.** UT accounts should have a 76 subcategory to allow foreign travel. If the account does not have a 76 subcategory, you cannot charge or reimburse foreign travel without asking the grant program officer for permission. This is usually granted, but it might delay travel arrangements or reimbursements.



- a. International reservations not made through Concur or a contract travel agency requires information to be entered into the International SOS database by the traveler. The site can be located at:  
<https://travel.utexas.edu/travelplanning/international-sos>
- b. International SOS is a company contracted by UT to provide medical and travel security during international travel.