SOHA PPS 04.01.20

 Effective Date 5/1/2022

**Travel and Absence from Office**

 Review Date: 4/2/2022

 Next review date: 04/02/2027 (E5Y)

 Sr. Reviewer: SOHA Director

**01.     POLICY STATEMENT**

SOHA is committed to our transparency and equity of funds allocation. The Director will occasionally provide a budget brief to the faculty to show how Maintenance and Operations (M&O) funds are spent each year.

**02. SOHA PROCEDURES**

Travel money is allocated using the following guidelines:

* 1. Money is available to faculty who are traveling for the following purposes: (a) to present a paper or poster at a professional meeting or (b) to represent the School at a professional meeting, or c) conduct recruiting visits, or d) obtain continuing education credits for re- certifications, or e) participate in alumni event.
	2. Funds are allocated to faculty on a $650 per academic year basis, with funds to be encumbered no later than 31 July. Additional funds and funds not used by each faculty member are available to be re- distributed for identified faculty needed as outlined above and are funded first-come, first-served, as the budget permits. Faculty who submit more than one travel application must number the applications to indicate first choice for funding, which is second, and so forth.
	3. Besides funding travel by faculty and graduate students, the Director must set aside money to pay the travel costs of job candidates visiting the School. This money must come from the School’s regular travel budget.
	4. Faculty who decide not to travel after submitting an application should inform the Director immediately.
	5. If additional travel funds become available (e.g., from faculty who decide not to travel), the Director may fund late applications and/or allocate the available balance to cover the cost of trips already made by faculty.
	6. The School Director sets aside money for School related activities such as attendance at the ACHE/AUPHA Annual Meeting, the THA meeting, travel to field placements sites and/or other activities as determined by the Director to have direct impact on the mission and vision of the School.
	7. The remaining funds are divided evenly across all tenured and tenure track, full-time faculty for travel and continuing education costs. The Director will announce the availability and amount of such funds at the first faculty meeting in the fall. Employees that are not tenured or tenure track, full-time faculty are not eligible for the allocation, but may submit travel requests to the Director for consideration.
	8. Faculty will encumber travel funds by July 31st. Funds not encumbered by July 31st will remain with the School and do not carry over to the next fiscal year.
	9. To initiate a travel request, the traveler needs to fill out an SOHA Travel Notification Form and submit for Director’s approval. This form needs to be filled out as completely as possible. Sign & date this form and give to the administrative assistant in charge of travel.
	10. The traveler must submit the travel notification with sufficient time to be approved by the appropriate levels prior to the trip. This means that in-state travel should be submitted at least three work days prior to the trip, out-of-state should be submitted at least five work days prior and foreign travel should be submitted no later than 60 calendar days prior to the trip. The administrative assistant will stamp the form with the date & time it is received and will follow up with an email to the traveler confirming receipt of the notification form and giving the funds available for reimbursement as well as the lodging & per diem rates for the destination(s) to be visited.
	11. A travel request will be entered in the University’s online travel management system (Concur) by the administrative assistant on the traveler’s behalf based on the information submitted on the SOHA Travel Notification Form. The traveler does not need to approve travel requests in the online system.
	12. Once the travel request has been approved by the appropriate levels the administrative assistant will print the approved request and email it to the traveler as a PDF document.
	13. After the trip has been completed, the obligation is on the traveler to initiate the reimbursement process. The traveler needs to file a SOHA Travel Expense Form to confirm the trip occurred as requested and supply all necessary, zero-balance (paid) receipts to the administrative assistant for processing. The administrative assistant will again stamp the form with the date & time it is received and enter the expenses claimed into the Concur system. When the reimbursement is ready, the traveler will log in to release the reimbursement for payment. No payment will be made without the traveler releasing the reimbursement.
	14. Receipts – Necessary receipts are to include, but not are not limited to, airfare, hotel, public transportation (shuttle, taxi, bus, etc.), toll fees, rental car and registration. Meal receipts are not required. All receipts should show the entire purchase as paid in full with a zero dollar balance.
	15. Lodging – all lodging will be paid at the Per Diem Rate for that area as specified by the U.S General Services Administration website or the amount of lodging, if less than the allowed rate. Lodging taxes are reimbursable with the exception of the State of Texas Hotel Occupancy Taxes, which state travelers are exempt from. Taxes do not count towards the maximum Per Diem Rate.
	16. The administrative assistant will check the system every Friday to look for unpaid reimbursements and follow up with the Travel Office or traveler as needed.
	17. More information regarding travel requirements & procedures are available from the Travel Office website and the Texas Comptroller of Public Accounts website.