

**Date: March 26, 2018**

**To: DDD, University Business Managers, MOU Financial Leads**

**From: Janet Rupert, Director of Systems and Operations**

**Subject: 2018 Travel Updates and Restrictions**

Along with recent mileage updates, the North Carolina Office of State Budget and Management (OSBM) has released some additional travel guidelines and restrictions for 2018. University faculty, staff, students, affiliates, and independent contractors may be reimbursed for transportation expenses incurred while traveling on University business. They must abide by the following restrictions:

**Meal reimbursements.** Travelers are only eligible for reimbursement of meals when they make an overnight trip. Partial day reimbursement is possible when the partial day is the day of departure or return for a trip, but it must be in conjunction with an overnight trip taken. *This differs from past years, where a day trip could have meals reimbursed.* No excess reimbursement will be allowed for meals unless there are predetermined charges, or the meals were for out-of-country travel.

University travelers may claim reimbursement for the following meals if:

- **Breakfast:** depart duty station prior to 6 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 prior to 5:00 p.m. (day of departure) or return to duty station after 8:00 p.m. (day of return).

**Clarification to UNC Policy on Excess Lodging Expenses.** Excess lodging expenses must be justified if hotel rates, excluding taxes and surcharges, exceed **\$300 per night (or \$400 per night)**, if staying in one of the following high-cost cities: Boston, New York City, San Francisco and the Bay Area, Washington DC, and Los Angeles). If those limits are exceeded, travelers must complete [Form 1302.1.1f Excess Lodging Justification](#) and obtain their supervisor's approval and signature before travelling. Only five justifications are acceptable to claim excess lodging reimbursement:

- the hotel is where the conference is located
- the hotel is in a high-cost area (and documentation is provided showing this hotel was the most reasonable price)
- the safety and security of the traveler was unattainable at the current allowance (a statement due to this effect must be provided and documentation is provided showing this hotel was the most reasonable price)

- The hotel had a discounted rate because it was suggested by the conference
- The traveler shared this room with a colleague

The signed form should be submitted with the travel reimbursement.

Although this State policy was in effect as of Jan. 1 of this year, the new requirements of the excess lodging form, as well as the necessity of an overnight stay for meal reimbursement, will not be effective for the University until the release date of this memo. No retro actions need to be taken for previous travel.