**R25. Government Operations, Finance.**

**R25-7. Travel-Related Reimbursements for State Travelers.**

**R25-7-1. Purpose.**

The purpose of this rule is to establish procedures to pay travel-related reimbursements to travelers of an agency or board that is subject to this rule.

**R25-7-2. Authority.**

This rule is established under Section 63A-3-107, which authorizes the Division of Finance to make rules governing in-state and out-of-state travel expenses.

**R25-7-3. Definitions.**

(1) "Actual cost" means the total amount of money that was paid for an expense.

(2)(a) "Agency" means any department, division, bureau, office, or other administrative subunit of state government under the executive branch.

(b) "Agency" includes any board subject to this rule.

(3) "Board" means a board, commission, council, committee, task force, or similar body established to perform a governmental function.

(4) "Conference hotel" means the hotel designated by the conference host, as specified in the conference materials.

(5) "Department" means an executive department of state government.

(6)(a) "Designee" means the person who has written permission from the executive director to act on the executive director's behalf.

(b) The executive director is responsible for selecting a designee who has the knowledge, skills, and experience to make decisions in the best interest of the agency.

(7) "Executive director" means a department executive director, department commissioner, chief of staff, or equivalent of a chief executive officer.

(8) "Fleet vehicle" means a vehicle owned or leased by an agency. This also includes vehicles rented for use as motor pool vehicles by an agency.

(9)(a) "Ground transportation" means the use of taxi, rideshare, shuttle, or public transportation for state business.

(b) "Ground transportation" does not include the use of taxi, rideshare, shuttle, or public transportation for a commute to and from a traveler's home and regular place of work.

(10)(a) "Hotel" means an establishment that provides lodging for travelers.

(b) "Hotel" does not include a vacation rental.

(11)(a) "International travel" means travel outside the 48 contiguous states.

(b) "International travel" includes travel to Alaska, Hawaii, and US Territories and Possessions.

(12) "Out-of-state travel" means travel outside Utah but within the contiguous United States.

(13) "Per diem" means the reimbursement rates established for travel by the following agencies:

(a) the US General Services Administration for the contiguous United States as set forth in 41 CFR 301-11.6 (2004), which is incorporated by reference;

(b) the Department of Defense for Alaska, Hawaii, and US Territories and Possessions as set forth in 41 CFR 301-11.6 (2004); and

(c) the Department of State for foreign travel as set forth in 41 CFR 301-11.6 (2004).

(14) "Rate" means an amount of money.

(15) "Reimbursement" means money paid to compensate a traveler for money spent.

(16) "Sufficient documentation" means the documents that show the merchant, amount paid, method of payment, date incurred, and description of the item purchased or service received. A combination of supporting documents may be needed to verify each element of the expense. Sufficient documentation includes the following official evidence of transaction:

(a) itemized receipts;

(b) invoices;

(c) cash register tape receipts;

(d) canceled checks or other documents reflecting proof of payment or electronic funds transferred;

(e) account statements; and

(f) credit card statements.

(17)(a) "Traveler" means any person who is traveling for state business for an agency.

(b) This includes employees, board members, elected officials, vendors, volunteers, and grant recipients or award beneficiaries.

**R25-7-4. Limitation on Travel-Related Reimbursements.**

(1) Nothing in this rule may be construed to apply to a person's relocation expenses.

(2) Reimbursement for relocation expenses is covered by policy.

**R25-7-5. Eligible Expenses.**

(1) Reimbursements are intended to cover ordinary travel-related expenses that are reasonable under the circumstances.

(2) Alcoholic beverages may not be reimbursed.

**R25-7-6. Requirements for Requesting to Travel.**

(1)(a) State business travel, whether reimbursed or not, must be approved by the appropriate authority before a traveler departs.

(b) This includes non-employees when the agency pays for the travel expenses.

(c) In-state travel must be approved by the traveler's supervisor.

(d) Out-of-state travel must be approved by the traveler's executive director.

(e) International travel must be approved by the traveler's executive director and the governor's chief of staff.

(2)(a) A traveler shall use the state's travel system to request approval to travel if:

(i) traveling outside Utah; or

(ii) requesting a cash advance.

(b) If a traveler leaves for an unexpected, urgent out-of-state trip without using the state's travel system to get approval, the agency's executive director or designee may approve the trip after the traveler departs. The traveler shall explain in writing why the trip was urgent.

(c) If a traveler cannot use the state's travel system, the traveler shall use the FI 5 travel request form or an alternative process that includes the same information required by the form.

(d) A traveler shall include each expected travel expense when requesting approval to travel. Estimates for expenses shall be reasonable and reflect realistic costs.

(3) A traveler is not required to use the state's travel system to request approval for in-state travel, but in-state travel must still be approved by the traveler's supervisor.

**R25-7-7. Requirements for Requesting Reimbursement.**

(1) To be reimbursed according to the rates in this rule, a traveler must comply with this rule.

(a) If a traveler does not comply and does not have an approved exception, the executive director or designee shall be notified.

(b) The executive director or designee shall take appropriate corrective action and decide whether the traveler is reimbursed for the expense.

(c) If the executive director or designee approves reimbursement, the approval shall be included with the sufficient documentation needed for the expense as explained in Subsection R25-7-7(3)(c).

(2) Reimbursement for state travel shall be approved by the traveler's division director or the agency equivalent of a division director.

(3)(a) A traveler shall use the state's travel system to request reimbursement.

(b) If a traveler cannot use the state's travel system, the traveler shall use the FI 51 reimbursement request form or an alternative process that includes the same information required by the form. If the reimbursement request is for mileage only, the traveler shall use the FI 40 mileage reimbursement request form or an alternative process that includes the same information required by the form.

(c) A reimbursement request shall include sufficient documentation for each travel expense, except for expenses for which there is a flat allowance amount.

**R25-7-8. Reimbursement for Meals.**

(1) A traveler may be reimbursed for meals.

(2) A traveler is reimbursed per diem for meals as explained in 41 CFR 301-11.6, 301-11.17 301-11.18, 301-11.101 (2004).

(3) A provided meal, such as a meal included in a registration cost, is deducted from the per diem.

**R25-7-9. Reimbursement for Incidental Expenses.**

(1) A traveler may be reimbursed for incidental expenses.

(2) A traveler is reimbursed per diem for incidental expenses as explained in 41 CFR 301-11.6 and 301-11.101 (2004).

(3) The following are considered incidental expenses and are included in the incidental expenses per diem rate:

(a) laundry expenses; and

(b) fees and tips given to porters, baggage carriers, and hotel staff.

**R25-7-10. Booking a Hotel.**

(1)(a) If staying at a conference hotel, a traveler shall book a conference hotel room either directly through the hotel or through the contracted travel agency by using the state's travel system or the State Travel Office. The room rate must be the best available rate within 300% of the per diem.

(b) If the conference hotel rate is more than 300% of the per diem, the traveler shall book a non-conference hotel according to Subsection R25-7-10(2).

(2) If staying at a non-conference hotel, a traveler shall book a room through the contracted travel agency by using the state's travel system or the State Travel Office. The room rate must be within the per diem.

(a) If there are no hotels in the area that have rooms within the per diem, the traveler shall book the hotel that has the best available rate within 300% of the per diem.

(b) If there are no hotels in the area that have rooms within 300% of the per diem, the traveler shall contact the State Travel Office to book a hotel room.

**R25-7-11. Booking Other Types of Lodging.**

(1) A traveler may book a vacation rental site if:

(a) the vacation rental site is in the best interest of the state; and

(b) the cost per person is within per diem.

(2) A traveler may stay with a friend or relative.

(3) A traveler may stay in a personal camper or trailer home.

**R25-7-12. Reimbursement for Lodging.**

(1) A traveler may be reimbursed for lodging.

(2) The destination must be 50 miles or more from the traveler's personal residence.

(3)(a) The executive director or designee may approve lodging that is less than 50 miles from the traveler's personal residence if:

(i) there is an unusual circumstance, such as the traveler is required to work at the destination after work hours or there are safety issues; and

(ii) the traveler requests the exception before the trip.

(b) The request for the exception and the approval shall be included with the sufficient documentation needed for the expense as explained in Subsection R25-7-7(3)(c).

(4)(a) For a conference hotel, a traveler is reimbursed the actual cost up to 300% of the per diem.

(b) The traveler shall include the conference registration materials when requesting reimbursement.

(5) For a non-conference hotel, a traveler is reimbursed the actual cost of the hotel.

(6) For a vacation rental site, the traveler who paid for the vacation rental site is reimbursed the actual cost up to the per diem per person.

(7) For staying with a family member or friend, a traveler may receive a taxable allowance of $25 per night.

(8) For staying in a personal camper or trailer home, a traveler may be reimbursed:

(a) the actual cost up to the per diem if the traveler has sufficient documentation from the facility; or

(b) a taxable allowance of $25 per night if the traveler does not have sufficient documentation.

**R25-7-13. Booking Air Travel.**

(1) A traveler shall book airfare through the contracted travel agency by using the state's travel system or the State Travel Office.

(2) A traveler shall use a contracted airline unless:

(a) the airline cannot meet the business needs of the traveler; or

(b) a non-contracted airline offers a lower fare.

(3) A traveler shall book economy or main cabin fares.

(4) Airline tickets and service fees shall be charged directly to the state-operated account designated for airfare.

(5)(a) If a traveler needs to change a flight, the traveler shall request approval from the division director or the agency equivalent of the division director.

(b) In the request, the traveler shall explain in writing why changing the flight is necessary.

(c) The request for the flight change and the approval shall be included with the sufficient documentation needed for the expense as explained in Subsection R25-7-7(3)(c).

(d) A traveler shall contact the State Travel Office to change a flight.

(e) If a change fee is $75 or less, a traveler can change a flight the day of departure without getting approval or contacting the State Travel Office.

**R25-7-14. Reimbursement for Expenses Related to Air Travel.**

(1)(a) A traveler may be reimbursed mileage for driving to and from the airport. See Subsection R25-7-16(2) for the reimbursement rate.

(b) A traveler who is driven to the airport by a friend or family member is reimbursed for two round trips to and from the airport.

(2)(a) A traveler may be reimbursed for airport parking.

(b) A traveler is reimbursed the actual cost up to the airport's lowest daily parking rate for each day of parking.

(3) A traveler may be reimbursed for taking ground transportation to and from the airport. See Section R25-7-15.

(4) A traveler is not reimbursed for priority seating or seat upgrades, except for rare circumstances.

(a) A request for a seat upgrade must be approved in writing by the executive director or designee before the traveler departs.

(b) In the request, the traveler shall explain in writing why a seat upgrade is necessary.

(c) The request for the seat upgrade and the approval shall be included with the sufficient documentation needed for the expense as explained in Subsection R25-7-7(3)(c).

**R25-7-15. Reimbursement for Ground Transportation.**

(1) A traveler may be reimbursed for using ground transportation.

(2) If a traveler takes a rideshare for in-state travel, the traveler shall use a contracted rideshare company unless traveling to and from an airport for a flight.

(3) A traveler is reimbursed the actual cost of ground transportation that is related to state business travel, such as transportation to and from the airport.

(4) A traveler is not reimbursed for personal use of ground transportation, such as transportation to a restaurant or movie theater.

(5) A traveler is not reimbursed for an upgrade to a rideshare unless there is a documented business purpose.

(6) A traveler may be reimbursed for tips for ground transportation if a tip is shown on an original, itemized receipt.

(7)(a) A traveler is reimbursed the actual cost of tips up to 20% of the total fare, including taxes and fees.

(b) If a 20% tip results in an amount less than $5, a traveler may tip up to $5. The traveler is reimbursed the actual cost of the tip up to $5.

**R25-7-16. Reimbursement for Mileage.**

(1) A traveler may be reimbursed for mileage when using a private vehicle.

(2) A traveler is reimbursed a calculated mileage rate rounded to the nearest cent based on the average of the two federal mileage automobile rates as explained in 41 CFR 301-10.303 (2004).

(3) A traveler is not reimbursed for mileage that is for:

(a) personal use, such as driving to a restaurant or movie theater; or

(b) commuting to and from the traveler's home and regular place of work.

(4)(a) A traveler shall use the state's travel system to calculate mileage.

(b) If unable to use the state's travel system, the traveler may calculate mileage using a generally accepted route planning website. The traveler is reimbursed based on the most commonly traveled route.

(5) Only the owner of the vehicle may be reimbursed for mileage regardless of the number of people in the vehicle.

(6)(a) A traveler may choose to drive their personal vehicle instead of taking a flight if the request is approved in writing by the executive director or designee before the traveler departs.

(b) The executive director or designee shall consider whether the reimbursement cost for the traveler's mileage and time driving is more than the cost of flying and whether the benefit of driving justifies those costs.

**R25-7-17. Booking Rental Vehicles.**

(1) A traveler may rent a vehicle if approved in writing before the traveler departs. See Subsections R25-7-6(1)(c) through R25-7-6(1)(e) for who shall approve a rental vehicle.

(2) A vehicle shall be rented in the traveler's own name.

(3)(a) A traveler shall book a rental vehicle through a contracted rental company by using the state's travel system or the State Travel Office.

(b) A traveler shall use a vehicle rented through a state contract only for business travel days.

(4) When booking a vehicle, a traveler shall reserve the type of vehicle based on business needs.

(5) A traveler may not rent a vehicle if staying at a conference hotel, except for rare circumstances.

(a) A request for a rental vehicle at a conference hotel must be approved in writing by the executive director or designee before the traveler departs.

(b) In the request, the traveler shall explain in writing why renting a vehicle is necessary.

(c) The request for a rental and the approval shall be included with the sufficient documentation needed for the expense as explained in Subsection R25-7-7(3)(c).

**R25-7-18. Billing and Reimbursement for Rental Vehicles.**

(1) For in-state rentals, an agency is billed directly for the rental vehicle.

(2) For out-of-state rentals, a traveler is reimbursed the actual cost of the rental.

(3) A traveler is reimbursed the actual cost of fuel unless the traveler chooses the prepaid fuel option when picking up the rental vehicle. A traveler is not reimbursed for fuel purchased from the rental company.

(4) A traveler is not reimbursed for upgrades in size or model made when picking up the rental vehicle.

**R25-7-19. Reimbursement for Parking.**

(1) A traveler is reimbursed the actual cost of parking if:

(a) parking is necessary for official business; and

(b) the use of a private or rental vehicle is approved before the traveler departs.

(2) A traveler is not reimbursed for parking that is related to personal use, such as parking at a restaurant.

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