

TRAVEL FOR CONSULTANTS/SPEAKERS/NON-COMPENSATED INDIVIDUALS SPONSORED AWARDS

OUHSC POLICY

Travel for Consultants/Speakers

Below is an excerpt from the Travel Policy for the University. Only if the consultant is volunteering his/her services, can their travel be reimbursed through the Travel category. Otherwise it needs to be part of the Consulting Agreement – either listed separately in an itemized budget accompanying the consulting agreement or included as part of the fee for service or fee per hour rate in the consulting agreement. When these costs are processed through OUHSC, they will be coded as “Consulting.” (*They can also be coded as professional services if indicated as such in budget for sponsored awards*).

Cost Accounting Standards also states:

“501 – Consistency in Estimating, Accumulating and Reporting Costs by Educational Institutions

Fundamental Requirement – An educational institution’s practices used in estimating costs in pricing a proposal shall be consistent with the educational institution’s cost accounting practices used in accumulating and reporting costs.”

Excerpt from OUHSC Travel Policy:

“Non-employee travel is covered under the policy if the travel expenses were:
Incurred by a student traveling at the University’s request.
Incurred at the University’s request by an individual in the course of seeking employment with the University.
Provided for in a grant and contract for a conference participant when no other fees for the individual’s service or participation will be made.
Incurred by an individual who has volunteered his services and payment or the individual’s services will not be made.

Travel expenses incurred by a vendor or consultant should be included in the total amount of the contract award or honorarium. Any such travel expenses cannot be reimbursed on the State of Oklahoma Travel Voucher.”

WHERE TO BUDGET FOR SPONSORED AWARDS

PAID SPEAKERS/CONSULTANTS

Registration, airfare (ATA) and lodging paid directly to vendors by OUHSC for speakers/consultants should be budgeted and expensed under the TRAVEL budget category.

Out-of-pocket travel expenses such as taxi's, shuttles, meals, mileage if traveling by car, etc. may be reimbursed to the speakers/consultants as part of their agreement with OUHSC and should be budgeted and expensed under either the OTHER or CONSULTING budget category. Receipts for these out-of-pocket expenses must accompany the invoice from the speaker/consultant. If hotel and/or airfare was paid initially by the speaker/consultant, then these costs should be invoiced along with the fee, and be budgeted and expensed as part of their agreement with OUHSC under the either the OTHER or CONSULTING budget category. Receipts will be needed as well.

The decision to use either the OTHER or CONSULTING budget category depends on sponsor requirements or PI desire to separate consulting costs from the other costs that fall under the OTHER budget category. Either one is acceptable for OUHSC.

NON-COMPENSATED INDIVIDUALS (EX: PARTICIPANTS/RESEARCH SUBJECTS OR VOLUNTEER SERVICES) WHEN TRAVELING ON BEHALF OF OUHSC

Whether paid directly by OUHSC or reimbursed to the individual, all travel costs for individuals volunteering services are budgeted and expensed under TRAVEL. As long as they are not compensated, they can be reimbursed using Travel Form 19. Receipts must accompany the form.

Participants/research subjects travel should be budgeted and expensed under the OTHER budget category and processed for payment using GL Account Code 922300.