



UT System Administration Policy Library – Policy UTS120
Spousal Travel Policy

Responsible Officer: Associate Vice Chancellor – Controller and Chief Budget Officer

Sponsoring Office: Office of the Controller

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Errors or changes to: policyoffice@utsystem.edu

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POLICY STATEMENT

This policy sets forth the policy for payment or reimbursement of travel, meals, and expenses of spouses of chief administrative officers of The University of Texas System and its institutions, and travel, meals, and expenses of spouses of other employees of The University of Texas System and its institutions.

RATIONALE

Historically, when a chief administrative officer of The University of Texas System or one of its institutions has had a spouse, subject to the spouse's concurrence and availability, the spouse has functioned as a special representative of the UT System or the institution to perform services that further the official state business purpose of the UT System or the institution. Those services have been performed without compensation, but travel, meals, and expenses incidental to the performance of those services have been reimbursed at actual cost or paid directly by the UT System or institution.

SCOPE

All institutions and UT System Administration

WEBSITE ADDRESS FOR THIS POLICY

<http://www.utsystem.edu/policy/policies/uts120.html>

RELATED STATUTES, POLICIES, REQUIREMENTS OR STANDARDS

UT System Administration Policies & Standards	Other Statutes, Policies & Standards
<ul style="list-style-type: none">• Board of Regents' Rules and Regulations, Rule 30106	<ul style="list-style-type: none">• Texas Attorney General Opinion No. H-1089 (1977)• Texas Attorney General Opinion

	<p>No. MW-93 (1979)</p> <ul style="list-style-type: none"> • Texas Attorney General Opinion No. LO-90-31 (1990)
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CONTACTS

If you have any questions about UT System Administration Policy UTS 120, *Spousal Travel Policy*, contact the following offices:

Subject	Office Name	Telephone Number	Email/URL
	Office of the Controller	(512) 499-4527	http://www.utsystem.edu/cont/

DEFINITIONS

None

RESPONSIBILITIES

Chancellor

- May designate the spouse of a chief administrative officer as a "Special Assistant" or "Associate to the Chief Administrative Officer."

Spouse/Special Assistant/Associate to the Chief Administrative Officer

- Acts in a representative capacity for the UT System or an institution only when performing duties that are consistent with those described in this policy.
- Serves as a special assistant and adviser to the chief administrative officer.
- Serves with or independent of the chief administrator officer as an official representative of the UT System or an institution at events that are related to or that support the purposes of the UT System or the institution.
- Is responsible for the official chief administrative officer residence.

Person at Next Supervisory Level or General Counsel to the Board of Regents

- Judges whether expenses included in a request for payment or reimbursement of the "Special Assistant" or "Associate to the Chief Administrative Officer" are for a bona fide business purpose.

Chief Administrative Officer

- Provides prior written approval for reimbursement or direct payment of the actual cost of travel, meals, and incidental expenses of the spouse of an employee of the UT System or an institution, other than the spouse of the chief administrative officer.

Payroll office or other business office

- Evaluates any spousal travel that is paid for by the UT System or the institution to determine whether the payment is taxable for federal income tax purposes.
- Provides relevant information to the Internal Revenue Service.

PROCEDURES

1. Designation of Spouse as Special Assistant or Associate to the Chief Administrative Officer

The Chancellor may designate the spouse of a chief administrative officer as a "Special Assistant" or "Associate to the Chief Administrative Officer" for the purpose of performing services that further the official state business purposes of the UT System or an institution, if the spouse is available and chooses to accept the designation. The designation is not automatic.

A spouse who is designated as a "Special Assistant" or "Associate to the Chief Administrative Officer" may act in a representative capacity for the UT System or an institution only when performing duties that are consistent with those described in this policy.

2. Duties of a Special Assistant or Associate to the Chief Administrative Officer

The following duties are illustrative of services performed by the spouse of a chief administrative officer while functioning as an official representative of the UT System, an institution, or the chief administrative officer:

- Serves as a special assistant and adviser to the chief administrative officer and, when requested, has direct responsibility for planning, production, and oversight of official locations, events, or activities.
- Serves with or independent of the chief administrative officer as an official representative of the UT System or an institution within the institutional and

broader community at meetings, workshops, conferences, community and institutional activities, alumni events, faculty/student/staff activities, and other events that are related to or support the purposes of the UT System or the institution.

- When appropriate, assists the chief administrative officer or other institutional representative with public relations, development, and fund-raising activities.
- Is responsible for the official chief administrative officer residence, including supervising the hiring and performance of duties of residence staff and other personnel engaged in residence maintenance, decoration, and repair.
- Performs other duties as assigned or deemed appropriate to the UT System or institutional needs.

3. Reimbursement for Travel, Meals and Expenses

A spouse of a chief administrative officer designated as a "Special Assistant" or "Associate to the Chief Administrative Officer" is entitled to reimbursement or direct payment for the actual cost of travel, meals, and incidental expenses when functioning in that capacity in performing the duties described in this policy. Travel, meals, and incidental expenses not related to the performance of those duties must be paid directly by the individual and not submitted for reimbursement or billed to the UT System or the institution. If any billing, payment, or reimbursement is later determined to be inconsistent with this policy, the spouse or chief administrative officer must reimburse that amount to the UT System or the institution.

Reimbursement or direct payment is subject to the following additional conditions and limitations:

- When the chief administrative officer and spouse travel together, available steps to reduce institutional cost should be followed (e.g., hotel rates where single/double occupancy can be negotiated at same rate, advance ticket rates, two-for-price-of-one ticket options, use of earned points for second ticket, shared use of rental cars, etc.).
- Designation of a spouse as "Special Assistant" or "Associate to the Chief Administrative Officer" must not conflict with other employment and must be approved by the Chancellor. (See Sample Designation Request Form.)
- Supervision, review, evaluation, and judgment regarding employment issues must be consistent with rules relating to the appointment of relatives.
- The person at the next supervisory level must determine whether an expense included in a request for payment or reimbursement of the "Special Assistant" or "Associate to the Chief Administrative Officer" is for a bona fide business purpose, except that the General Counsel to the Board of Regents must make that determination regarding expenses incurred by the spouse of the Chancellor.

- Taxes, if any, resulting from the reimbursement or payment of expenses of the spouse designated as "Special Assistant" or "Associate to the Chief Administrative Officer" are the obligation of the spouse or, if appropriate, the chief administrative officer.

4. Other Benefits Available to a Special Assistant or Associate to the Chief Administrative Officer

Other benefits provided to the spouse of a chief administrative officer designated as a "Special Assistant" or "Associate to the Chief Administrative Officer" include:

- an appropriate identification card to provide access to institutional libraries and other facilities,
- official business cards,
- special parking permits where needed for use at facilities owned or controlled by the institution, and
- adequate workspace and administrative support necessary to perform assigned duties.

5. Spouses of Other UT System or Institution Employees

Occasionally, travel, meals, and expenses of the spouse of other employees of the UT System or an institution will be deemed to be for a bona fide business purpose and a benefit to the UT System or the institution. Under those circumstances and with the prior written approval of the chief administrative officer, that spouse is entitled to reimbursement or direct payment for the actual cost of travel, meals, and incidental expenses in accordance with the section of this policy entitled "Reimbursement for Travel, Meals, and Expenses."

The propriety of reimbursement is dependent in part on the nature of the employee's office, the spouse's traditional role, the purpose of the particular trip, and the spouse's connection with that purpose. For example, the presence of the spouse of the vice president or a dean may be necessary at a major event for supporters or potential donors where attendance by spouses is customary and expected. See Texas Attorney General Opinions [No. H-1089](#) (1977), [No. MW-93](#) (1979), and [No. LO-90-31](#) (1990).

6. Reporting for Federal Income Tax Purposes

Travel by a spouse of an employee of the UT System or an institution that does not serve a bona fide business purpose must be paid for by the employee or spouse individually. The appropriate payroll office or other business office must evaluate any spousal travel that is paid for by the UT System or the institution to determine whether the payment is taxable for federal income tax purposes. The payroll office or other business office must include the amounts that it determines are appropriate in the employee's W-2 or report

those amounts under other Internal Revenue Service procedures. Departments or other divisions of the UT System or the institution must provide all relevant information regarding spousal travel to the appropriate payroll or business office.

7. Interpretation

The Associate Vice Chancellor - Controller and Chief Budget Officer officially interprets this policy and is responsible for revising it as necessary to meet the changing needs of the UT System and statutory requirements.

FORMS AND TOOLS/ONLINE PROCESSES

[Sample Designation Request Form](#)

APPENDIX

None

Keywords: spouses, travel, spousal, husband, wife, spouse, personnel, out of pocket reimbursements
