

Date: July 1, 2006

MEMORANDUM TO: Chancellors O'Keefe, Cavanaugh, Costonis, Marsala, Nunez, Richardson, Rock, Ryan and Executive Directors Bouchard and Smithburg

SUBJECT: PM-13, University Travel Regulations for FY 2006-2007

This memorandum supersedes PM-13 dated July 1, 1998, and subsequent revisions.

I. Introduction

A. Application of Regulations

The Commissioner of Administration issued revised General Travel Regulations in Policy and Procedure Memorandum No. 49, effective July 1, 2006. This permanent memorandum is not meant to be all inclusive of PPM No. 49. It does serve to supplement the General Travel Regulations indicating the University policy where discretion is permitted or where exceptions approved by the Commissioner of Administration have been granted. All travel at University expense is subject to the provisions of these General Travel Regulations. University expense is interpreted to include all funds, including gifts and grants, which are administered by the University. Reimbursement for the cost of any travel can be obtained only as provided herein.

B. General Specifications

1. Contracted Travel Services

The State has contracted for travel-related services which must be used unless exemptions have been granted **prior** to travel by the individual on your campus who has been delegated this authority for your campus. Requests for an exemption must document that the traveler saved 10% and experienced a cost savings amounting to at least \$30.00, not including the travel agency service fee. Reservations for in-state hotel/motel accommodations are not required to be made through the contracted travel agencies.

2. Recognized Purposes

In general, the University may provide travel funds for the following purposes:

- a) Authorized travel of members of the Board of Supervisors, faculty, staff (including graduate assistants and student workers) on behalf of the University.
- b) Authorized travel of participating students to represent the University in various types of intercollegiate events.
- c) Authorized travel of faculty members to attend meetings of learned or professional societies to present papers, to represent the University, or as a major officers or members of important committees.
- d) Members of the staff who are designated by the appropriate administrative officer as delegates to conventions or association meetings.
- e) Authorized travel of guest lecturers, seminar directors, and others who are called upon to contribute time and services to the University.
- f) Persons invited to the campus for consideration for appointment to faculty or staff positions.
- g) Authorized travel of superior students being recruited by the University.

3. Authorization

- a) Travel at University expense by any member of the faculty or staff will be authorized only when the purpose of the travel will benefit the University and the particular department concerned.
- b) All travel at the University expense will be under the direct control of and must be approved in advance and in writing by the head of the budgetary unit (i.e., the Dean of a college, Director of a division, or a designated administrative officer).

- c) An authorization for routine in-state travel for an employee who must travel in the course of performing his/her duties may be given once each fiscal year, and must be renewed each fiscal year. This may include domicile travel if such is a regular and necessary part of the employee's duties, but not for attendance at infrequent or irregular meetings, etc. Within the city limits where his/her office is located, the employee may be reimbursed for mileage only. An annual authorization for routine in-state travel shall not cover travel between an employee's home and workplace, out-of-state travel, or travel to conferences and conventions.
- d) Payment of travel expenses will be subject to availability of funds in the departmental budget concerned.

4. Funds for Travel Expenses

Persons traveling on official business will provide themselves with sufficient funds for all routine travel expenses that cannot be covered by the corporate credit card. Advances of funds for travel shall be made only for extraordinary travel and should be punctually repaid when submitting the travel voucher covering the related travel, not later than the fifteenth day following the completion of travel.

EXEMPTIONS: Cash advances may be allowed for:

- a) Employees whose salary is less than \$30,000/year.
- b) Employees who applied for the corporate credit card program but were rejected (proof of rejections must be available in campus travel file).
- c) Employees who accompany and/or are responsible for students on group or client travel.
- d) New employees who have not had time to apply for and receive the card.
- e) Employees traveling for extended periods (defined as over 30 days).
- f) Employees traveling to remote destinations in foreign countries, such as jungles of Peru or Bolivia.
- g) Advance ticket purchases (over 30 days).
- h) Registration for seminars, conferences, and conventions.
- i) Incidental costs not covered by the corporate card (i.e., taxi fares, tolls; limited to \$25.00 per day).
- j) First night hotel lodging when required to be paid in advance by the hotel property.

5. Expenses Incurred on University Business

Traveling expenses of travelers shall be limited to those expenses necessarily incurred by them in the performance of a public purpose authorized by law to be performed by the University and must be within the limitations prescribed herein.

6. Centrally Billed Accounts (CBA issued in the name of a University department only)

CBAs issued in the name of a University department are to be used only for state contract airline reservations and conference registrations.

7. No Reimbursement When No Cost Incurred by Traveler

No claim for reimbursement shall be made for any lodging and/or meals furnished by any party at no cost to the traveler. In no case will a traveler be allowed mileage or transportation when he/she is gratuitously transported by another person.

C. Claims for Reimbursement

- 1. All travel expenses must be submitted on approved travel voucher forms to the appropriate business office. A travel voucher must indicate the purpose of the trip, the date and hour of departure and return to domicile, and include a statement showing the particular relationship of the trip to the budget account to which it is charged. When speaking at a conference for which there is no registration fee, documentation must be provided to prove attendance. The travel voucher must be signed by the person claiming reimbursement and approved by his/her immediate supervisor or the authority with financial responsibility for the trip.
- 2. Except in instances where the cost of air transportation and conference registration are invoiced directly to a University CBA, all expenses incurred on any official trip shall be paid by the traveler. The

travel voucher should show all such expenses in detail such that the total cost of the trip is reflected on the travel voucher. If the cost of air transportation and/or the registration fee is paid directly, a notation should be indicated on the travel voucher indicating the date of travel, destination, amount, and the fact that it has been paid by a University CBA, LaCarte or direct payment.

3. Claims should be submitted by the fifteenth day of the month following the completion of travel.
4. Where groups of University representatives are traveling and one voucher is submitted covering the party, the name of each member must be listed, together with his/her position at the University and, when not self-evident, the purpose of the trip. In cases where members of the group are given an allowance for meals, signed documentation evidencing receipt of such benefit by each of the group members should accompany the voucher. Receipts must be provided in cases where one member seeks reimbursement for meals paid for the entire group. One member of the group may not claim meal allowances for the entire group unless the meal allowances were paid over to each member of the group and the voucher is supported by documentation from other members certifying the amount of meal money received.
5. Any person who submits a claim pursuant to these regulations and who willfully makes and subscribes to any claim which he/she does not believe to be true and correct as to every material matter, or who willfully aids or assists in, or procures, counsels or advises the preparation or presentation of a claim which is fraudulent or is false as to any material matter shall be guilty of official misconduct. Whoever shall receive an allowance or reimbursement by means of a false claim shall be subject to disciplinary action, up to and including termination, as well as be criminally and civilly liable within the provision of State law.

II. Definitions

For the purposes of these regulations, the following words have the meaning indicated:

A. Authorized Persons

1. Advisors, consultants, or other persons who are called upon to contribute time and services to the State who are not otherwise required to be reimbursed through a contract for professional, personal, or consulting services in accordance with R.S.39:1481 et seq.
2. Members of boards, commissions, and advisory councils required by Federal or State legislation or regulation. Travel allowance levels for all such members and any staff be those authorized for State employees unless specific allowances are legislatively provided.

B. Conference/Convention - Defined herein as a meeting for a specific purpose and/or objective. Non-routine meetings can be defined as a seminar, conference, convention, or training. Documentation required is a formal agenda, program, Letter of Invitation, or registration fee. Participation as an exhibiting vendor in an exhibit/trade show also qualifies as a conference. The requirement for a hotel to qualify for conference rate lodging is that the hotel is hosting or is in "conjunction with hosting" the meeting.

C. Emergency Travel - Under extraordinary circumstances where the best interests of the State require that travel be undertaken not in compliance with these regulations, approval after the fact by the Commissioner of Administration may be given if appropriate documentation is presented promptly.

D. Extended Stays - Any assignment made for a period of 31 or more consecutive days at a place other than the official domicile.

E. In-state Travel - All travel within the borders of Louisiana or travel through adjacent states between points within Louisiana when such is the most efficient route.

F. International Travel - All travel to destinations outside the 50 United States, District of Columbia, Puerto Rico, and the U.S. Virgin Islands.

G. Official Domicile

1. Every State officer, employee, and authorized person, except those on temporary assignment, shall be assigned an official domicile.
2. Except where fixed by law, official domicile of an officer or employee assigned to an office shall be, at a minimum the city limits in which the office is located. The official domicile of an authorized person shall be the city in which the person resides, except when the campus head has designated another location (such as the person's workplace).
3. A traveler whose residence is other than the office domicile of his/her office shall not receive travel and subsistence while at his/her official domicile nor shall he/she receive reimbursement for travel to and from his/her residence.
4. The official domicile of a person located in the field shall be the city or town nearest the area where the majority of work is performed, or such city, town, or area as may be designated by the campus head, provided that in all cases such designation must be in the best interest of the University and not for the convenience of the person.

H. Out-of-state Travel - Travel to any of the other 49 states plus District of Columbia, Puerto Rico, and the U.S. Virgin Islands.

I. Per Diem - A flat rate paid by the Federal government in lieu of travel reimbursement for people on extended stays. Employees of the State of Louisiana may claim the U.S. Department of State federal per diem rate for lodging and meals for international travel only. U.S. Department of the State federal per diem rates for lodging and meals vary based on location and dates of travel. The rates are available on the U.S. Department of State website, <http://www.state.gov/m/a/als/prdm>. Reimbursement at these rates requires submission of receipts.

J. State Employees - Employees below the level of State officer.

K. State Officer

1. State elected officials
2. Department head as defined by Title 36 of the Louisiana Revised Statutes (i.e., Secretary, Deputy Secretary, Under-Secretary, Assistant Secretary, and equivalent positions in higher education and the office of elected officials)

L. Temporary Assignment - Any assignment made for a period of less than 31 consecutive days at a place other than the official domicile.

M. Travel Period - A period of time between the time of departure and the time of return.

N. Travel Routes - The most direct and usually traveled route must be used by official State travelers.

O. Traveler - A State officer, State employee, or authorized person when performing authorized travel.

III. Methods of Transportation

The most cost effective method of transportation that will accomplish the purpose of the travel shall be selected. Among the factors to be considered should be length of travel time, cost of operation of a vehicle, cost and availability of common carrier services, etc.

A. Air

1. Common carrier shall be used for out-of-state travel unless it is documented that utilization of another method of travel is more cost efficient or practical in accordance with these regulations.
2. Before travel by privately owned or by chartered aircraft is authorized, the traveler shall certify that: 1) at least one hour of working time will be saved by such travel, and 2) no other form of transportation, such as commercial air travel or a State plane, will serve this same purpose.
 - a) Chartering a privately owned aircraft must be in accordance with the Procurement Code (purchasing procedures).
 - b) Reimbursement for use of a chartered or unchartered privately-owned aircraft under the above guidelines will be made on the following basis:
 - (1) At the rate of 40 cents per mile; or
 - (2) At the lesser of state contract rate or coach economy airfare.

Note: If there are extenuating circumstances requiring reimbursement for other than listed above, approval must be granted by the Commissioner of Administration.
 - c) When common carrier services are unavailable and time is at a premium, travel via State aircraft shall be investigated, and such investigation shall be documented and attached to the travel voucher for the trip in question.
3. Commercial air travel will not be reimbursed in excess of state contract air rates when available, or coach/economy class rates when contract rates are not available. The difference between contract or coach/economy class rates and first class or business class rates will be paid by the traveler. If space is not available in less than first or business class air accommodations in time to carry out the purpose of the travel, the traveler will secure a certification from the airline indicating this fact. The certification is required for travel reimbursement.
 - a) The University encourages but does not require use of lowest priced fares where circumstances which can be documented dictate otherwise. Lowest logical fares are penalty tickets that can have restrictions and charge penalty fees for changing/canceling ticket purchases. Lowest logical tickets must be purchased from the State's contract travel agency unless prior approval is granted by the Commissioner of Administration or their designee.
 - b) Where a stopover is required to qualify for a low-priced airfare, the University will pay additional lodging and meals expense subject to applicable limits where a net savings in total trip expenses results from use of the low-priced airfare. For determining whether there is a savings, the state contract airfare should be used for comparison, or coach/economy fare if there is no contract rate. The comparison must be shown on the travel voucher.
 - c) The policy regarding airfare penalties is the University will pay the penalty incurred for a change in plans or cancellation only when the change or cancellation is required by the University. Certification of the requirement for the change or cancellation by the traveler's department head/supervisor is required on the travel voucher.
 - d) For international travel only, when an international flight segment is more than 10 hours in duration, the University will allow the business class rate, not to exceed 10 percent of the coach rate. The traveler's itinerary provided by the travel agency must document the flight segment as more than 10 hours and must be attached to the travel voucher.
 - e) A lost airline ticket confirmation is the responsibility of the person the ticket was issued. The airline charge for searching and refunding lost tickets will be charged to the traveler. The difference between the prepaid amount and the amount refunded by the airlines must be paid by the employee.

- f) When a companion fare is purchased for a State employee and a non-State employee, reimbursement to the State employee will be the amount of the lowest logical fare.
- g) Contract airfares are to be purchased only through the State's contracted travel agencies and are to be used for official State business. **State contract airfares are non-penalty tickets. Therefore, no penalty fees are charged for changes/cancellations, and no restrictions are imposed on flight schedules.** The state contract airfares **cannot** be used for personal/companion or spouse travel. This is a requirement of the airlines and our failure to monitor the use of these contract airfares could cause their cancellation. Therefore, persons booking tickets for non-official business using contract rates will be subject to disciplinary action as well as payment of the difference between contract fare and full coach fare.
- h) Traveler is to use the lowest logical airfare, whether the plane is a prop or a jet.
- i) Employees may retain promotional items, including frequent flyer miles, earned on official State travel. However, if an employee makes travel arrangements which favor a preferred airline/supplier to receive promotional items/points and this circumvents purchasing the most economical means of travel, they are in violation of this travel policy. Costs for travel arrangements subject to this violation are non-reimbursable.
- j) In order for the State to continue to receive state-contracted airfares, it is necessary that the contract carrier be utilized. When using the contract airfares there are no restrictions or penalties. In many cases, airlines that did not win an award for a certain city will now offer the same or lower price than was awarded to the contract vendor. This is known as a matched carrier. Matched carriers are not to be used unless there is two or more hours' difference in the departure or arrival time. The State does not have a contract with the matched fare carriers; therefore, we do not have the last seat availability and certain rules including cancellation penalties will apply to these fares. Once the decision is made not to use the contract fare, you are giving up your option for the non-penalty ticket, and must use the lowest logical fare available.
- k) When making airline reservations for a conference, the traveler should give the travel agency the name of the conference and the airline that is offering a discount rate, if available. In many instances, the conference registration form specifies that certain airlines have been designated official carrier offering discount rates. If so, giving this information to our contracted agencies could result in them securing the rate for the traveler.

4. Use of Corporate Card

- a) The University contracts an official corporate card to form one source of payments for all. All travelers shall apply through their appropriate campus Business Office. The current contract is with Bank of America for a Visa Travel Card.
- b) Airfare at contract fares must be charged to the corporate card or to a CBA (Centrally Billed Account). Airfare not charged to one of these two accounts may result in airlines not allowing the employee to board at the contract fare. Airlines may reject contract fares when tickets are not charged to the corporate card or to the CBA. When this happens, the employee is subjected to non-boarding or being charged the difference from coach fare cost. The additional fare cannot be reimbursed by the University.
- c) The corporate card is the liability of the employee and not the University. An employee terminating University service must return the card to the appropriate campus Business Office for cancellation. A retiree may not retain his/her card.

B. Motor Vehicle

No vehicle may be operated in violation of State or local laws. No traveler may operate a vehicle without having a valid State driver's license in his/her possession.

Safety restraints shall be used by the driver and passengers of vehicles. All accidents, major and minor, shall be reported first to the local police department or appropriate law enforcement agency. An accident report form, available from the office responsible for campus safety, should be completed as soon as possible and returned to that office, along with the names and addresses of principals and witnesses. In addition, the accident must be reported to the Department of Public Safety as required by law.

1. University Vehicles

- a) All purchases made on University gasoline credit cards must be signed by the approved traveler making the purchase. The license number and the unit price and quantity of the commodity purchased must be noted on the delivery ticket by the vendor. Items incidental to the operation of the vehicle may be purchased via University gasoline credit cards only when away from official domicile in travel status. In all instances where a credit card is used to purchase items or services which are incidental to the operation of a vehicle, a tissue copy of the credit ticket along with a written explanation of the reason for the purchase should be attached to the monthly report required to be filed on all University vehicles.
- b) University credit cards will not be issued to travelers for use in the operation of privately-owned vehicles.
- c) University-owned vehicles may be used for out-of-state travel only if permission of the department head has been given prior to departure. If a University vehicle is to be used to travel to a destination more than 500 miles from its usual location, documentation that this is the most cost-effective means of travel should be readily available in the department's travel reimbursement files.
- d) Unauthorized persons should not be transported in University vehicles. Approval of exceptions to this policy may be made by the traveler's supervisor if he/she determines that the best interest of the University will be served and if the passenger (or passenger's guardian) signs a statement acknowledging the fact that the University assumes no liability for any loss, injury, or death resulting from said travel.

2. Personally-owned Vehicles

- a) When two or more persons travel in the same personally-owned vehicle, only one charge will be allowed for the expense of the vehicle. The person claiming reimbursement shall report the names of the other passengers.
- b) A mileage allowance shall be authorized for travelers approved to use personally-owned vehicles while in the conduct of official University business. Mileage shall be reimbursable on the basis of 40 cents per mile. Mileage for moving expenses shall be reimbursed at the federal rate in effect at the time of the move.
- c) Mileage shall be computed by using one of the following options:
 - (1) On the basis of odometer from point of origin to point of return; or,
 - (2) A website mileage calculator or published software package indicating mileage (to be attached to the travel expense voucher).
- d) An employee shall never receive any benefit from not living in his/her official domicile. In computing reimbursable mileage to an authorized travel destination from an employee's residence outside the official domicile, the employee is always to claim the lesser of the miles from their official domicile or from their residence.
- e) When use of a privately-owned vehicle has been approved for out-of-state travel, the traveler will be reimbursed for en route expenses inclusive of meals, lodging, and mileage on the basis of 40 cents per mile. The total cost may not exceed the cost of travel by state contract air rates or coach rate if no contract rate is available.
- f) When a traveler is required to regularly use his/her personally-owned vehicle for University business, the campus head or a single designee may authorize a lump sum allowance for transportation or reimbursement for transportation (mileage). Requests for lump sum allowance must be accompanied by a detailed account of routine travel listing exact mileage for each such route. Miscellaneous travel must be justified by at least a three-month travel history to include a complete mileage log for all travel incurred, showing all points traveled to or from and the exact mileage. Requests for lump sum allowance shall be granted for periods not to exceed one fiscal year.
- g) The traveler shall be required to pay all operating expenses of the vehicle, including fuel, repairs, and insurance. Repairs and routine maintenance required in the use of personally-owned vehicles are the responsibility of the traveler and do not qualify for additional reimbursement.

3. Rented Motor Vehicles (Receipts Required)

- a) In-state Vehicle Rental - There is a state contract with Enterprise for in-state vehicle rentals which use is mandatory unless it is determined that the vendor does not have the appropriate size fleet in stock for the date of use.
- b) Out-of-state Vehicle Rental - There is no state contract for vehicle rentals outside of Louisiana. However, there are price offers that will be available from multiple vehicle rental companies listed in the Louisiana Travel Guide. When a traveler is approved to rent a vehicle for out-of-state use, they may select a vendor listed in the guide or seek a lower fare.
- c) Approvals - Written approval of the traveler's Dean (or equivalent level supervisor) prior to departure is required for the rental of vehicles. Such approval may be given when it is shown that vehicle rental is the only or most economical means by which the purpose of the trip can be accomplished. In each instance, documentation showing cost effectiveness of available options must be attached to the travel expense voucher.
- d) Vehicle Rental Size - Only the cost of rental of compact models is reimbursable, unless 1) non-availability is documented, 2) the vehicle will be used to transport more than two persons, or 3) the cost of a larger vehicle is no more than the rental rate of a compact.
- e) Insurance for Vehicle Rentals within the 50 United States - Insurance billed by car rental companies (i.e., CDW or LDW) is not reimbursable for domestic travel. Insurance coverage for rental vehicles is provided by the Office of Risk Management. If a collision occurs while on official State business, the accident should be reported to the Office of Risk Management as soon as possible.
- f) Insurance for Vehicle Rentals outside the 50 United States (Receipts Required) - The Office of Risk Management recommends that the appropriate insurance (liability and physical damage) provided through the car rental company can be purchased when the traveler is renting a vehicle **outside** the 50 United States or the traveler is a non-employee contractor. With the approval of the department head, insurance costs may be reimbursed for travel outside the 50 United States only.

The following are some of the insurance packages available by rental vehicle companies that **are reimbursable**:

- (1) Collision Deductible Wavier (CDW) – If a collision occurs while on official University business, the cost of the deductible should be paid by the traveler and reimbursement claimed on a travel expense voucher. The accident should also be reported to the office responsible for campus safety.
- (2) Loss Damage Wavier (LDW)
- (3) Auto Tow Protection (ATP) - Requires department head approval
- (4) Supplement Liability Insurance (SLI) - * If required by the rental company
- (5) Theft and/or Super Theft Protection (coverage of contents lost during a theft or fire) - * If required by the rental company
- (6) Vehicle coverage for attempted theft or partial damage due to fire - * If required by the rental company

The following are some of the insurance packages available by rental vehicle companies that **are not reimbursable**:

- (1) Personal Accident Insurance (PAC) - Employees are covered under workmen's compensation while on official University business.
- (2) Emergency Sickness Protection (ESP)
- g) Any personal mileage or rental days on a vehicle rented for official State business is not reimbursable and will be deducted from the claim for reimbursement.
- h) Reasonable gasoline cost is reimbursable when receipts are submitted; mileage is not reimbursable on rental vehicles. Pre-paid fuel options are only to be allowed when the travel can document that the pre-purchased amount was necessary and that the amount charged by the rental company is reasonable in relation to local gasoline cost.

C. Public Ground Transportation

The cost of public ground transportation such as buses, subways, airport limousines, and taxis is reimbursable when the expenses are incurred as part of approved University travel. Receipts are required for expenditure in excess of \$15.00 per day. At a department level, the Dean or Department Head may implement a department-wide policy requiring receipts for an amount less than \$15.00 per day.

D. To and From Common Carrier Terminals and Home or Office

1. Reimbursement will be allowed for taxicab fares between a common carrier or other terminal and either the employee's home or office. Receipts are required for individual amounts over \$15.00.
2. Instead of using a taxicab, payment on a mileage basis at the rate of 40 cents per mile will be allowed for the round-trip mileage of a privately owned vehicle.

IV. Reimbursement for Lodging and Meals

A. Eligibility

1. Official Domicile/Temporary Assignment

Travelers are eligible to receive reimbursement for travel only when away from "official domicile" or on temporary assignment unless exception is granted in accordance with these regulations. Temporary assignments will be deemed to have ceased after a period of 31 calendar days and after such period the place of assignment shall be deemed to be his/her official domicile. He/she shall not be allowed travel and subsistence unless permission to extend the 31-day period has been secured from the Associate Vice Chancellor for Accounting and Financial Services.

2. Travel Period

Travelers may be reimbursed for meals according to the following schedule:

Single Day Travel - Meals are not eligible for reimbursement on single day travel. This means that when an authorized traveler of the State is in travel status where no overnight stay is required, no meals are eligible for reimbursement. Each department head or their designees are to determine the reasonableness of when an overnight stay is justified. However, the department head will be allowed to authorize single day meal reimbursements on a case-by-case basis or by type(s) of single day travel when it is determined to be in the best interest of the department. In those cases where the single day meals are reimbursed, the amount of the reimbursement must be considered taxable income to the employee. If the department head or their designee determines that single day meals will be provided for, they must follow the following allowances:

To receive any meal reimbursement on single day travel, an employee must be in travel status for a minimum of 12 hours. **The maximum allowance for meal reimbursement for single day travel will be \$24.00.**

- a) **Breakfast & Lunch:** (\$17.00) The 12 hours travel duration must begin at or before 6:00 a.m.
- b) **Lunch:** (\$10.00) Requires 12 hours duration in travel status
- c) **Lunch & Dinner:** (\$24.00) The 12 hours travel duration must end at or after 8:00 p.m.

3. Travel with Overnight Stay - Travelers may be reimbursed for meals according to the following schedule:

- a) **Breakfast:** When travel begins at/or before 6:00 a.m. on the first day of travel and extends beyond 9:00 a.m. on the last day of travel, and for any intervening days.
- b) **Lunch:** When travel begins at/or before 10:00 a.m. on the first day of travel and extends beyond 2:00 p.m. on the last day of travel, and for any intervening days.
- c) **Dinner:** When traveling begins at/or before 4:00 p.m. on the first day of travel and extends beyond 8:00 p.m. on the last day of travel, and for any intervening days.
- d) **Alcohol:** Reimbursement for alcohol is prohibited.

B. Exceptions

1. Lodging Overage Allowances

Department heads has the authority to approve lodging provisions of these regulations on a case by case basis not to exceed 75 percent over PM-13 current listed rates for Baton Rouge, New Orleans, and New Orleans' surrounding parishes, Lake Charles, and Lake Charles' surrounding parishes. For all other areas, department heads will have the authority to approve actual lodging provisions of these regulations on a case by case basis not to exceed 25 percent over PM-13 current listed rates. Each case must be fully documented as to necessity (i.e., proximity to meeting place) and cost effectiveness of alternative options. Documentation must be attached to the travel expense voucher. This authority shall not be delegated to any other person. Reimbursement requests must be accompanied by receipts.

2. Actual Expenses for State Officers

State officers and others so authorized by statute or individual exception will be reimbursed on an actual expense basis for meals and lodging except in cases where other provisions for reimbursement have been made by statute. The request for reimbursement must be accompanied by a receipt or other supporting document for each item claimed and shall not be extravagant and will be reasonable in relationship to the purpose of the travel. Positions eligible for actual expenses reimbursement are President, Vice President, Chancellor, and Vice Chancellor. They are subject to the time frames and all other requirements listed in the Travel Regulations.

C. Meals (Including Tax and Tips)

1. Travelers may be reimbursed up to the following amounts for meals:

	Tier I	Tier II	Tier III	Tier IV
Breakfast	\$ 7	\$ 8	\$ 10	\$ 11
Lunch	10	12	14	15
Dinner	14	17	21	25
Total	\$31	\$37	\$ 45	\$ 51

- Tier I In-state cities, with the exception of New Orleans
- Tier II New Orleans and out-of-state cities, with the exception of the cities listed in Tiers III and IV
- Tier III Atlanta, Cleveland, Dallas/Fort Worth, Denver, Detroit, Ft. Lauderdale, Hartford, Houston, Kansas City, MO, Las Vegas, Los Angeles, Miami, Minneapolis/St. Paul, Nashville, Oakland, CA, Orlando, Philadelphia, Phoenix, Pittsburgh, Portland, ME, Portland, OR, San Antonio, San Diego, St. Louis, Tampa, Wilmington, DE, Puerto Rico, U.S. Virgin Islands, all of Alaska and Hawaii, American Samoa and Guam
- Tier IV Baltimore, Boston, Chicago, New York City, San Francisco, Seattle, Washington, DC and international cities

2. Receipts are not required for routine meals within these allowances. Number of meals claimed must be shown on travel voucher. Partial meals such as continental breakfasts or airline meals are not considered meals. If meals exceed these allowances, receipts are required. If an individual seeks reimbursement of meal money for an entire group traveling together, each member of the group must certify the amount of meal money received from the individual claiming reimbursement. If an individual seeks reimbursement of meals paid for the entire group, receipts must be provided and the cost per person may not exceed the allowances.

D. Lodging (Plus Tax, Receipts Required)

Receipts from a bona fide hotel or motel for lodging shall be submitted and attached to travel voucher. The actual amounts are not to exceed:

\$60	In-state (except as listed)
\$60	Lafayette, Slidell
\$65	Bossier City, Shreveport
\$70	Baton Rouge, Gretna, Kenner, Metairie, Lake Charles, Sulphur
\$100	New Orleans
\$65	Out-of-state (except those listed)
\$105	High cost areas - Atlanta, Cleveland, Dallas/Fort Worth, Denver, Detroit, Ft. Lauderdale, Hartford, Houston, Kansas City, MO, Las Vegas, Los Angeles, Miami, Minneapolis/St. Paul, Nashville, Oakland, CA, Orlando, Philadelphia, Phoenix, Pittsburgh, Portland, ME, Portland, OR, San Antonio, San Diego, St. Louis, Tampa, Wilmington, DE, Puerto Rico, U.S. Virgin Islands, all of Alaska and Hawaii, American Samoa and Guam
\$155	Extra high cost areas - Baltimore, Boston, San Francisco, Seattle
\$180	New York City, Chicago, Washington, DC
\$180	International cities

The inclusion of suburbs shall be determined by the business office on a case-by-case basis.

E. Conference Lodging (Plus Tax, Receipts Required)

Travelers may be reimbursed expenses for conference hotel lodging per the following rates, if the reservations are made at the actual conference hotel. When reservations are not available at the conference hotel and multi-hotels are offered in conjunction with a conference, traveler shall seek prices and utilize the least expensive. In the event all conference hotels are unavailable, the traveler is subject to making reservations within the hotel rates as allowed in Section D above. Documentation required is a registration receipt and a formal agenda or program. Meals that are a designated integral part of the conference may be reimbursed on an actual expense basis with prior approval by the direct supervisor.

\$70	In-state (except as listed)
\$70	Lafayette, Slidell
\$75	Bossier City, Shreveport, Lake Charles, Sulphur
\$80	Baton Rouge, Gretna, Kenner, Metairie
\$120	New Orleans, State-sponsored conferences
\$140	Out-of-state and New Orleans for non-State sponsored conferences
\$155	Baltimore, Boston, San Francisco, Seattle
\$180	New York City, Chicago, Washington, DC
\$180	International cities

The inclusion of suburbs shall be determined by the business office on a case-by-case basis.

Three (3) competitive quotes to include meeting rooms, meals and breaks, etc. must be solicited for conferences hosted by the University. No reimbursements are allowed for functions not relating to a conference (i.e., tours, dances, etc.)

F. Extended Stays

For travel assignment involving duty for extended periods at a fixed location, the reimbursement rates indicated should be adjusted downward wherever possible. Claims for meals and lodging may be reported on a per diem basis supported by lodging receipts. Care should be exercised to prevent allowing rates in excess of those required to meet the necessary authorized subsistence expenses. It is the responsibility of each campus head or his/her single designee to authorize only such travel allowances as are justified by the circumstances affecting the travel.

G. Parking and Parking-related Expenses

1. Parking for the Baton Rouge Airport - The State's current contract rate is \$3.50 per day (no receipts required) for parking in the outside, fenced parking lot at the airport. Documentation required to receive the contract price is either a parking coupon or a travel itinerary issued by the state-contracted travel agency designating the employee is on "official State business". An employee may be paid actual expenses up to the rate charged by the contracted vendor per day with a receipt.
2. Parking for the New Orleans Airport - The State's current contract is \$5.50 per day and \$32.50 weekly at Park'n Fly (no receipts required). Documentation required to receive the contract price is an agency-issued photo ID, business card, state-issued corporate card, or a travel itinerary issued by the state-contracted travel agency designating the employee is on "official State business". An employee may be paid actual expenses up to the rate charged by the contracted vendor per day with a receipt.
3. Travelers using motor vehicles on official State business will be reimbursed for reasonable storage fees, for all other parking, including airport parking except as listed in 1 & 2 above, ferry fares, and road and bridge tolls. For each transaction over \$5.00, a receipt is required.
4. Tips of valet parking are not to exceed \$1.00 per in and \$1.00 per out, per day.

V. Reimbursement for Other Expenses

The following expenses incidental to travel may be reimbursed:

A. Communications Expense Relative to Official University Business (Receipts required for over \$3.00)

1. Official University Business - All costs (receipts required for over \$3.00).
2. Domestic Overnight Travel - Reimbursed up to \$3.00 for one (1) call home upon arrival at each destination and one (1) call every second night after the first night if the travel is extended several days.
3. International Travel - Up to \$10.00 upon arrival at each destination and prior to departure from each destination within the first or last 24 hours of the trip, respectively. For stays in excess of seven (7) days, one (1) \$10.00 call will be allowed for every second night after the first night.
4. Internet access charges for official State business from hotels or other travel locations are treated the same as business telephone charges.
5. Personal cell phone charges will not be reimbursed.

B. Charges for Storage and Handling Equipment (Receipts Required)

C. Tips for baggage handling not to exceed \$1.00 per bag for a maximum of three (3) bags, and limited to handling two (2) times for arrival and two (2) times per departure. For example, tips may be paid one time upon each hotel check-in and one time upon each hotel check-out, if applicable. Tips may also be paid one time for airport outbound departure trip and one time for the inbound departure trip.

D. Travelers using motor vehicles on official University business will be reimbursed for necessary storage and parking fees, ferry fares, and road and bridge tolls (receipts required for individual amounts over \$5.00).

E. Registration Fees at Conferences/Conventions (Receipts Required)

When registration fee is claimed, traveler must itemize what it covers (i.e., conference attendance, meals, lodging, transportation, etc.). Items included in the registration fee cannot be claimed again. Example: meals included in the registration fee must be excluded from the daily meal allowance. Meals that are a designated integral part of the conference may be reimbursed on an actual expense basis with prior approval of the direct supervisor.

F. Room Rental for a conference meeting using:

1. Procurement Code, or
2. State-contracted Travel Services

G. Laundry Services

Employees in travel status for more than (7) seven days are eligible for \$20.00 of laundry services every (7) seven days.

VI. International Travel

All international travel must be approved in writing by the campus head or single designee prior to departure. Requests for such travel should be submitted through appropriate administrative channels (department head, Dean/Director, Vice Chancellor and Provost) and should reflect:

- A. Place to be visited and route if other than direct
- B. Purpose of travel
- C. Dates of travel
- D. Source of funds for travel and estimated cost
- E. Any special allowances for meal and lodging reimbursement. U.S. Agency for International Development (AID) rates may be authorized upon request

International travelers will be reimbursed at the high cost area rates for lodging and meals at Tier IV rates, unless U.S. State Department rates are requested and authorized. Receipts are required for lodging and for meals claimed at the U.S. State Department rate. To accommodate the currency conversion, we recommend that expenses are paid using a credit card, and a copy of the credit card bill reflecting the charge in US dollars be attached to the travel voucher in lieu of a daily conversion calculation. For charges paid in cash, a conversion calculator must be attached.

Each campus must report all international travel authorizations to the Commissioner of Administration on a monthly basis. Copies of approved travel authorizations may be submitted as the report.

International airfares available from other sources may be less expensive than fares available from the contract travel agency.

Once an employee has been granted approval to travel internationally, the employee is free to either (1) book their airfare through the state-contracted travel agency, or (2) utilize one of the options below:

Option 1: If an employee decides to seek and finds a lower fare available from a source other than the state-contracted travel agency, the employee may purchase that ticket without any State approvals **if the cost is at least 30% cheaper than the state-contracted airfare to the destination city.** The cost of the transaction fee charged by the travel agency **is not** to be used in the calculation.

Option 2: If an employee seeks and finds a lower fare available from a source than the state-contracted travel agency and there is no contract fare for the destination city, the employee must obtain from the outside source a copy of the proposed itinerary and the complete cost. This information must be faxed to the state-contracted travel agency for review. The agency will determine if they can match or beat the airfare and, within 24 hours, fax back a response. If they can match or beat the fare, the ticket must be purchased from the state-contracted travel agency and the exception request will not be approved. If they cannot match the price, the agency will stamp the itinerary "approved" for outside purchase using a special stamp. Attached to the travel voucher, this

approval will be accepted to obtain reimbursement of the cost of the ticket not purchased through the state-contracted travel agency.

Employees must use caution when purchasing tickets from sources than the state-contracted travel agency, particularly restricted fares, many of which cannot be changed. The state-contracted travel agency will not be available to help with changes, cancellations, or other needs when a ticket has not purchased through their office. It will be the responsibility of the employee to ensure the ticket meets their needs and to make changes, cancellations, etc. after the ticket is purchased. Any fees associated with changes/cancellations are also the responsibility of the employee.

VII. Visitors to the Campus

When visitors are brought to the campus with the understanding that travel expenses will be reimbursed, the following procedure should be used:

- A. A letter should be addressed to the visitor prior to his departure informing him of the necessity of obtaining receipts, keeping a record of expenses of his trip, and that reimbursement will be made in accordance with University travel regulations. State-contracted travel services may be used to arrange travel for visitors to the campus but are not required if the visitors make their own arrangements from their departure city.
- B. The University official at whose request the visitor is on the campus shall be responsible for preparing the reimbursement voucher on the proper form and obtaining the visitor's signature thereon. This visitor's home address and social security number must appear on the voucher.
- C. Written authorization for reimbursement of travel expenses must be obtained from the department head (previously campus head) prior to being invited to campus for an employment interview. Travel for the spouse of a candidate may also be authorized for the employment interview. An annual report is prepared by the business office and submitted to the Commissioner of Administration of travel expenses reimbursed to or paid on behalf of persons invited for employment interviews, giving the name of the person, the title of the vacant position, and the amount of reimbursement. Travel expenses may not be paid or reimbursed to candidates for employment except for expenses incurred for interviews and/or official business trips. Local living expenses upon relocation to new domicile are not eligible for reimbursement.
- D. Written approval of the Dean is required for reimbursement of expenses for superior graduate and medical students being recruited by the University.

VIII. Special Meals

- A. Reimbursement designed for those occasions when, as a matter of extraordinary courtesy or necessity, it is appropriate and in the best interest of the University to use public funds for provision of a meal to a person who is not otherwise eligible for such reimbursement and where reimbursement is not available from another source. (Note: Expenses for spouses and children of employees may not be paid from public funds.)
 1. Candidates for employment at the University who are being hosted at a meal by University personnel. The number of University personnel participating should be kept to a minimum.
 2. Guest lecturers, visiting scholars and other visiting dignitaries or executive-level persons from other governmental units, business, or industry and persons providing identified gratuity services to the University. This explicitly does not include normal visits, meetings, reviews, etc., by Federal or State representatives.
 3. Extraordinary situations when University employees are required by their supervisor to work more than a 12-hour weekday or a 6-hour weekend (when such are not normal working hours to meet crucial deadlines or to handle emergencies).

4. A department head may authorize a special meal within allowable rates to be served in conjunction with a working meeting.

B. Reimbursement Limits for "Special Meals" are as follows:

<u>Meal</u>	<u>Maximum Allowed</u>
Breakfast	\$10.00 per person
Lunch	\$15.00 per person
Buffet Dinner Reception	\$15.00 per person
Dinner	\$25.00 per person
Refreshments	\$4.50 per person for catered events \$2.00 per person for non-catered events
Receptions	\$7.00 per person

Note: Allowances for refreshments and receptions apply only to expenditures made for the benefit of a group of people at a meeting, conference or convention; allowances are not additional "meal provisions" provided to individuals in travel status. University employees should be included only to the extent that their official capacity would indicate their presence as desirable (i.e., meetings are interdepartmental in nature).

2. Agency Hosted Conferences

- a) Cost of lunch served in conjunction with State/University-sponsored in-state conferences, excluding New Orleans billed to the University may not exceed \$15.00, exclusive of tax and tip.
- b) Cost of lunch served in conjunction with State/University-sponsored New Orleans conferences billed to the University may not exceed \$20.00, exclusive of tax and tip.

3. Group Refreshments

Group refreshments expenditures for a meeting, conference or convention are limited to those incurred on behalf of the conference or convention and are not eligible reimbursement claims for individual travelers. Group refreshment expenditures are to be within the following rates and are not to be considered an additional "meal allowance" for individuals in travel status.

- a) Served on State/University property - not to exceed \$2.00 per person, per morning and/or afternoon session.
- b) Served on hotel properties or other off-site properties that require catered services - not to exceed \$4.50 exclusive of tax and tip per person, per morning and/or afternoon session.

C. All special meals must have prior written approval from the campus head or a single designee in order to be reimbursed.

D. Requests to the campus head or a single designee for special meal authorization must be under signature of the employee assuming responsibility. The request must include:

1. Name and position/title of the employee requesting authority to incur expenses and assuming responsibility for such.
2. The nature of the activity and clear justification of the necessity and appropriateness of the request.
3. Names, official titles and affiliations of all persons for whom reimbursement of meal expenses is being requested.

- E. To claim reimbursement, all of the following must be submitted by the authorized employee:
1. Detailed breakdown of all expenses incurred, with appropriate receipt(s).
 2. Subtraction of cost of any alcoholic beverages.
 3. Original of prior written approval from the campus head or single designee.
 4. Itemized receipts.

Dr. William Jenkins
President, LSU System

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