



Alabama A&M University

Procedure

Procedure #: 3.4

Title: Travel

Effective Date: August 1, 2013

Revised Date: May 27, 2015

Responsible Office: Comptroller's Office – Accounts Payable

I. PURPOSE/OBJECTIVE

Alabama A&M University has a fiduciary responsibility to ensure that University resources are used in a fiscally responsible manner and in the best interest of the University. That responsibility includes safeguarding against unreasonable expenses and insuring adherence to state and federal laws and regulations.

This procedure has been developed in accordance with state and federal laws, regulations and industry best practices. It is applicable to University employees, students and others who travel on official University business.

To insure that the best interests of the University are served at the most reasonable cost, all university travel should be prudently planned. Excessive or unjustifiable costs will not be reimbursed. It is the traveler's responsibility to ensure that expenses and related reimbursement requests comply with all applicable policies and procedures including but not limited to proper authorization, sufficient receipts and documentation, and timely submission of reimbursement requests.

A quick guide to information regarding payment criteria, payment basis, rates & amounts, and documentation requirements, used in determining travel expense reimbursements and or allowances can be found in the "Travel Rates and Information Guide" on Comptroller's Office web page [Accounts Payable] link Resources Section.

The required travel forms will be found on the Comptroller's Office web page in the Forms section.

II. PROCEDURE

- a. University employees must obtain authorization from their supervisor prior to scheduling a business trip. Additionally, travel associated with a grant or contract must be authorized by the funding agency. For grant or contract related travel,

reimbursement is made at whichever is lower, the University rate or the rate set by the funding agency.

- b. Approval to travel requires the completion and approval of the **Banner General Encumbrance Maintenance Form (FGAENCB) and a Travel Authorization Request Form prior to the date of travel.** The following specific information must be entered on the form:

Destination

Purpose (description should be detailed)

Date(s) of travel

Projected cost (detailed i.e. # of days, rate per day, etc.)

Meals

Lodging

Mileage

Incidentals

- c. A “Travel Authorization Request” form is a University-wide requirement for travel and must be completed and approved **prior to the date of travel.** The form should reference the Encumbrance number assigned by Banner upon completion of the form FGAENCB referenced above.
- d. Conference or workshop travel requires the attachment of the conference brochure and agenda.
- e. Upon return from travel, a “Travel Expense Report” Form must be completed to request reimbursement. It must reference the Encumbrance number assigned prior to travel and must be completed within 30 days of the completion of travel. Requests submitted later than 30 days may be denied reimbursement. The approved “Travel Authorization Request” form must be attached along with all other required supporting documentation.

III. GUIDELINES

A. General

Travelers on official University business are expected to keep lodging expenses to a minimum by taking advantage of special conference rates, educational or government rates, and web promotional rates when seeking accommodations. Travelers should make reservations in advance whenever practical and avoid luxury hotels and motels.

Travel expenses incurred for personal, non-university business related matters, or matters that are beyond the scope of the approved travel are not reimbursable.

B. In-state Travel Reimbursement - Meals, Lodging, and Incidentals

In-State travel is reimbursed on a per-diem basis as established by state law. The rates are set according to the length of time traveled and whether or not overnight stay is involved. If you elect to claim less than the established per-diem rates, it must be noted on your voucher.

Out-of-state lodging selected for an event (meeting, conference, workshop, etc.) hosted within the state will be reimbursed in accordance with In-state reimbursement rates.

i. Same Day Travel

Departure and return trips within a 24 hour period that do not encompass overnight stay are eligible for the following meal reimbursement:

Trip Duration	Per Diem Reimbursement
Less than 6 hours	\$0.00
6 – 12 hours	\$11.25
Greater than 12 hours	\$30.00

ii. Overnight Travel

The per diem covers lodging, meals, and incidentals

No receipts are required

The per diem reimbursement rate is \$75 per day

A traveler stationed at the same place for a period in excess of two consecutive months

Trip Duration	Per Diem Reimbursement
Overnight (Two consecutive months or less)	\$75.00
Overnight (Greater than two consecutive months)	\$56.25

C. Out-of-state Travel Reimbursement - Meals Lodging and Incidentals

Depending on the location of the trip, it may be necessary to travel the day before the meeting/conference or to remain at the meeting site the night the meeting ends. If that is the case, reimbursement will be made for lodging and meal costs the day

before and/or the night the meeting ends. As a general rule, the University will not reimburse travel earlier than the day before or the day after a meeting/conference.

i. Meal and Incidental Reimbursement

Meal and incidental expenses for out-of-state travel requiring overnight stay are reimbursable on a per diem basis (*Receipts are not required*). Reimbursement rates are based on the city and state of travel per the U.S. General Services Administration (GSA) rates and breakdown.

Meals provided as a part of the conference, workshop, etc. are not reimbursable. The conference/workshop agenda and/or other documentation will be used to identify meeting-provided meals. The GSA breakdown for breakfast, lunch, and dinner will determine the amount of the per diem that will not be reimbursable.

Incidental Expenses include taxes paid on meals, and tips paid in conjunction with the meal as well as tips paid to baggage handlers, porters, other hotel staff, etc.

. Travelers will not be reimbursed separately for those items.

A queryable database is available on the GSA's web site. <http://www.gsa.gov> Click on the [Per Diem Rates] link (See example below)

Meals for the allowable days of departure and return shall be reimbursed on a partial basis in accordance with GSA partial day breakdown. This breakdown is available at the GSA's web site. From the [Per Diem Rates] link above click on the [M&IE Breakdown] link.

Meals for student travel – Student travel is classified as group or individual.

Group (student) travel is defined as travel generally in a group i.e. a departmental, organization, camp, team, intramural, or other. **The employee receives an advance** to pay for the students' travel cost **and assumes all responsibility for clearing the advance**. Travel funded in this manner **requires the submission of itemized receipts** which shall be reimbursed at the lesser of the allowable rate as established by GSA or as established by a grant (where applicable).

Individual (student) travel is defined as a student traveling generally without the accompaniment of an employee **and the student is individually responsible** for the cost of travel. In this instance, **the student receives an advance or reimbursement** at the lesser of the allowable rate as established by GSA or as established by the grant (where applicable). **No receipts are required**.

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FY 2015 Per Diem Rates for New Orleans, Louisiana

(October 2014 - September 2015)

SEARCH BY CITY, STATE OR ZIP CODE

Enter your City
New Orleans

OR

Enter your ZIP Code

FIND PER DIEM RATES

Louisiana

[Per Diem Map >](#)

ADDITIONAL PER DIEM TOPICS

- Meals & Incidental Expenses Breakdown (M&IE)
- FAQs
- State Tax Exemption Forms
- Factors Influencing Lodging Rates
- FY 2014 Per Diem Highlights
- Fire Safe Hotels
- Have a Per diem Question?
- Downloadable Per Diem Files

Cities not appearing below may be located within a county for which rates are listed. To determine what county a city is located in, visit the [National Association of Counties \(NACo\) website \(a non-federal website\)](#).

The following rates apply for **New Orleans, Louisiana**

Primary Destination* (1)	County (2, 3)	Max lodging by Month (excluding taxes)												Meals & Inc. Exp.**
		2014			2015									
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	
New Orleans	Orleans / St. Bernard / Jefferson / Plaquemine Parishes	154	154	154	151	151	151	151	151	151	107	107	107	71

* NOTE: Traveler reimbursement is based on the location of the work activities and not the accommodations, unless lodging is not available at the work activity, then the agency may authorize the rate where lodging is obtained.
 ** Meals and Incidental Expenses, see [Breakdown of M&IE Expenses](#) for important information on first and last days of travel.

CONTACTS

Additional Contacts for

- Travel Management Policy

NEED MORE INFORMATION?

- Rates for Alaska, Hawaii, U.S. Territories and Possessions (set by DoD)
- Rates in Foreign Countries (Set by State Dept.)
- Federal Travel Regulations (FTR)

RELATED TOPICS

- Travel Resources
- E-Gov Travel
- FedRooms
- POV Mileage Reimbursement Rates

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ii. Lodging Reimbursement

Lodging is reimbursed at the actual single room rate
Requires an itemized receipt
Receipt must reflect a \$0 balance
Receipt must be original
Single room rate with applicable lodging taxes

iii. Other Reimbursable Out-of State Travel Expenses

The following is a list of other reimbursable Out-of-State travel expenses. The list provides a basis for other common reimbursable expenses but is not an all-inclusive listing. These reimbursements require receipts.

- Baggage (sufficient justification required for more than one checked bag i.e. extended length of stay, presentation equipment and materials, etc.)
- Tips for baggage handlers, porters, or other hotel staff are reimbursed as a part of the Meal and Incidental Per Diem. Travelers will not be reimbursed separately for those items.
- Fuel (rental vehicle only)
- Registration Fees (If paid for with personal resources)
- Shuttle / taxi service, generally to and from the airport, bus terminal, train station, etc.
- Tolls (applicable to travel in personal or rented vehicle)
- Official business related telephone, telegraph, and faxes (must be documented to provide the person contacted, purpose and cost of the service)
- Parking (applicable to travel in personal or rented vehicle)
- Internet service (justifiable and reasonable i.e. required in conjunction with the purpose of the travel, to perform required work related functions, etc. cost shall not be exorbitant, and shall not be incurred via transportation i.e. in flight, or other in route transportation)
- Telegram and fax charges, including person who received the communication and the purpose and cost of the communication

D. International Travel Reimbursement

Travel outside the United States is considered international travel. That includes travel to U.S. territories (such as Puerto Rico) or to neighboring countries (such as Mexico or Canada). International travel requires prior written approval via an Authority to Travel Form.

International travel reimbursement rates are based on the Foreign Per-Diem rates as established by the US Department of State. Links to the Rate Table can be found on the Comptroller's Office – Accounts Payable web page or contact the Accounts Payable Travel Office.

Rates are revised frequently therefore travelers are strongly encouraged to check the rates prior to travel. Reimbursement will be made at the rates effective during the actual dates of travel.

i. Meal and Incidentals Reimbursement

Meals and Incidental Expenses include payments such as tipping, baggage handling, and transportation to/from meals.

Meals will be reimbursed on a per-diem basis in accordance with the Federal rates for international travel as established by the US Department of State. A link to the queryable database is available on AAMU's Comptroller's Office website.

The rates are based on the Country and State/Province of travel. If the specific location is not listed, the nearest listed location will be used as a reference.

Reimbursement will be made at the rates effective during the actual dates of travel.

Any "Per Diem" figures stated in grant or contract agreements will be used as maximum limits for reimbursement rather than a per diem. Reimbursement will follow standard University travel policies and will be made at whichever rate is lower, the Foreign Per-diem Rate or the rate established per the grant or contract.

ii. Lodging Reimbursement

Receipts are required.

Actual lodging expenses will be reimbursed at the single room rate. The maximum US GSA lodging rate allowable in effect at the time of travel for the travel destination will be used to gauge reasonableness. Excessive rates may be reimbursed at the GSA rate instead of the actual rate.

The rates are based on the Country and State/Province of travel. If the specific location is not listed, the nearest listed location will be used. Rates are revised monthly and reimbursement will be made at the rates effective during the actual dates of travel. You are strongly encouraged to check these rates prior to travel.

iii. Other Reimbursable International Travel Expenses

The following is a list of other reimbursable international travel expenses. These and others that may not be listed, but may be approved for reimbursement, require receipts.

- Official business related telephone, telegraph, and faxes (must be documented to provide the person contacted, purpose and cost of the service)
- Passports and visas (including photos)
- Inoculations
- Birth and health certificates
- Transportation to/from the destination city
- Transportation within the destination city pertinent to University business
- Airport parking
- Baggage and shipping charges (limited to one checked bag unless sufficiently justified)

iv. Currency Exchange Fees

The currency exchange fee may be claimed only when the traveler is required to convert to/from U.S. currency.

A receipt and documentation of the host country's requirements on using local currency is required.

Reimbursement for losses due to currency conversion may not be claimed.

Receipts need to be identified in U.S. dollars and foreign currency. The currency conversion rate should be noted.

v. Crossing the International Date Line

When crossing the International Date Line, compute the actual number of days on travel status not the number of calendar days.

E. Extended Travel Status

All Alabama A& M University employees have, for work and business travel purposes, a "home base". For most employees, that home base is the Alabama A& M University's main campus, although some employees, particularly those affiliated with the Alabama Cooperative Extension Service and North Alabama Center for Education (NACEE) are stationed at a location other than the main campus.

Any time an employee leaves their home base to conduct official University business for an actual or intended period of 1 year or less, they are considered to

be on **travel status** and are eligible to be reimbursed for travel expenses as outlined in the University's Travel Procedures outlined above.

In no circumstances can travel status be extended when the actual or intended length of stay exceeds 1 year (12 months). The applicable Vice President has responsibility for overseeing and approving extended travel.

According to IRS regulations an employee placed on assignment away from their home base that will last more than 1 year (12 months) is considered to have had a change in home base to the new location. If an employee has had such a **change in home base**, they are **not** considered to be on travel status and therefore, may **not** claim reimbursement for per diem, meals and/or living expenses. An employee whose home base has been changed may **instead** be reimbursed for relocation/moving expenses on both ends of the assignment as outlined in the University's Travel Procedures (Relocation Section). Travelers should be aware that applicable tax laws may make some travel reimbursements taxable income to the traveler. The travel destination can impact the amount the traveler can be reimbursed in travel expenses as outlined below:

i. In-state

Alabama A& M University and the State of Alabama mandated travel policies will govern reimbursements for In-State travel. In addition, in accordance with the State law governing in-state travel, those employees traveling within the State of Alabama for more than 2 months are reimbursed the full \$75 per day for the first 2 consecutive months on travel status and a reduced rate of **\$56.25** per day after the first 2 months (for up to 1 year).

ii. Out-of-State

Out of state travel is reimbursed for actual expenses for up to 1 year as defined in the Out-of-State Travel Section. In some cases, a short term apartment rental might be more economical than an extended hotel stay. Such expenses can be reimbursed with paid receipts if approved by the Department Head and Vice President. Any and all rental/lease agreements must be executed in the name of the employee/traveler...rental/lease agreements cannot be executed in the name of the University. All expenses are the responsibility of the employee with reimbursement for only those expenses that are allowable under Alabama A&M University procedures.

iii. International

International travel is reimbursed as outlined in the International Travel Section for up to 1 year. Actual expenses may not exceed the maximum federal

rates with receipts required for certain expenses. Official receipts must be presented for all forms of lodging whether commercial or privately owned.

F. Transportation

i. Air Travel

a. Reservations

Airline reservations are the employee's responsibility and are to be made through the department. Reimbursement will be made at the lowest logical standard or discounted rate for the period of business travel. Reservations must be made a minimum of 14 days in advance of travel. In relation to air travel, Alabama A&M University will reimburse reasonable baggage fees with appropriate receipts. Trips that include additional personal stops are not authorized. Reimbursement for first-class airfare will be made only when a supporting statement is provided by the airline or travel agency stating that no lower rate was available. Air travel booked using frequent flyer miles will not be reimbursed by Alabama A&M University.

b. Payment

Airline tickets may be charged to the department. The original invoice (screen print, e-mail confirmation, etc.) and a copy of the travel itinerary should be available. Airline tickets purchased using a personal credit card may be reimbursed in advance of travel with appropriate documentation and the submission of a Travel Expense Form. When a trip is cancelled after a non-refundable ticket has been issued, the ticket can be applied to a trip in the future by that traveler on that airline minus a change or cancellation fee. The unused ticket value must be used toward a business trip for the University in the future. Responsibility for monitoring use of unused tickets and/or airline credits resides with the Department Head. Change fees are not reimbursable unless the trip was changed/cancelled for a business related purpose.

ii. Private Vehicle

Alabama A& M University insurance provides NO physical damage coverage for damage to personal vehicles used on university business. Your personal automobile liability insurance is your primary coverage when using your personal vehicle for university business. If your liability limits become exhausted following an accident, the university's insurance policy

provides a second layer of excess liability coverage, provided the personal vehicle was used for approved university business.

a. **Personal Vehicle Reimbursement**

The mileage rate is established by the state. The rate covers all vehicular costs, including, repairs, and fuel. In-town mileage in the area where the employee is officially stationed will not be reimbursed. Nor does Alabama A& M University reimburse mileage from an employee's residence to their officially stationed homework base.

On rare occasions, employees incurring routine and frequent mileage while using their personal vehicle to conduct Alabama A& M University business within the Huntsville city limits and/or Madison city limits of their homework base may be approved for reimbursement of such mileage.

This reimbursement is on an exception basis and requires a letter of justification and approval from their supervisor. Requests for such reimbursement can be accumulated and submitted on a travel expense record form when they exceed \$25. A log reflecting the date, purpose and associated odometer readings for each claim must be attached to any form seeking reimbursement.

Mileage is calculated based on the shortest distance between Alabama A&M University or the employee's official homework base and the destination, as reflected on [MapQuest.com](#) or [Google Maps](#).

When mileage from the traveler's residence is closer than their homework base, reimbursement should be calculated on the shorter distance.

b. **Airfare-in-lieu of Mileage**

When traveling on University business and the round trip mileage will exceed 1200 miles round trip, you will be reimbursed at whichever is lowest, the current mileage rate or the lowest discounted airfare. This is called airfare-in-lieu of mileage. All airfare-in-lieu of mileage rates should be confirmed with Accounts Payable prior to travel.

iii. Rental Vehicles

Vehicle rentals for local, domestic, and international use should be obtained through Alabama A& M University's preferred contract vendor. Rental vehicles may be used if approved by the supervisor. However, vehicle rentals are not allowable when the sole purpose is for

transportation to and from the airport, or when shuttle and/or taxi services are available. University travelers are expected to rent Compact or Midsize class vehicles unless sharing the rental with more than 2 other Alabama A&M University business travelers.

Rental vehicles must be rented in the name of the traveler and the agreement must state “on behalf of” or “for” Alabama A&M University so that the vehicle is covered by the University’s liability insurance. Rental insurance is **not** reimbursable.

Rental of sport utility vehicles, minivans, or other kinds of specialty vehicles are generally prohibited. Exceptions require justification and prior authorization from the Accounts Payable. **Rental of luxury vehicles is not permitted.** University travelers are highly encouraged to rent hybrid and fuel efficient vehicles when available.

Legitimate car rental expenses include daily rental fees, local and state taxes, concession fees, mileage fees, and drop off fees if returning the rental vehicle to a destination other than the pickup location.

Other reimbursable fees related to rental car travel include gasoline, tolls, and parking fees (must have appropriate receipts). Navigation systems are reimbursable only if traveling in remote locations and a business justification is provided and approved.

Any rental days determined to be for personal use will be the responsibility of the traveler. If the university incurs an expense for a traveler’s personal use days the traveler must reimburse the University within five business days of notification or the amount will be payroll deducted from the next payroll.

iv. Train Travel

a. Reservations

Train reservations are the employee’s responsibility and are to be made through the department. Reimbursement will be made at the coach rate or lowest logical standard or discounted rate for the period of business travel. Reservations must be made a minimum of 14 days in advance of travel. Alabama A&M University will reimburse reasonable baggage fees with appropriate receipts. Trips that include additional personal stops are not authorized. Reimbursement for first-class fare will be made only when a supporting statement is provided by the train station or travel agency stating that no lower rate was available. Air travel booked using frequent flyer miles will not be reimbursed by Alabama A&M University.

b. Payment

Train tickets may be charged to the department. The original invoice (screen print, e-mail confirmation, etc.) and a copy of the travel itinerary should be available. Train tickets purchased using a personal credit card may be reimbursed in advance of travel with appropriate documentation and the submission of a Travel Expense Form. When a trip is cancelled after a non-refundable ticket has been issued, the ticket can be applied to a trip in the future by that traveler less a change or cancellation fee. The unused ticket value must be used toward a business trip for the University in the future. Responsibility for monitoring use of unused tickets and/or train fare credits resides with the Department Head. Change fees are not reimbursable unless the trip was changed/cancelled for a business related purpose.

G. Non-reimbursable Expenses

The list below identifies expenses that generally do not qualify for reimbursement. It provides some of the more common un-reimbursable items and is not intended to be a complete listing. Questions or uncertainty regarding an expense's eligibility should be referred to the Travel Coordinator prior to incurring the expense.

- Priority Boarding or Pre-Check Program Fees
- In-room on-demand movie or game rental
- Alcoholic beverages in any form
- Exercise room fees
- Recreational charges such as golf, tennis, ski lift tickets, etc
- Laundry and dry cleaning
- Personal phone calls
- Cost incurred for failure to cancel hotel reservations unless authorization or approval has been received before hand
- Room service meals (meals charged to the room must be broken out separately from the lodging costs and claimed under the actual meal cost reimbursement)
- Wi-Fi/internet access during transportation i.e. planes, busses, trains, taxi's etc.

H. Travel Advances

Travel advances are restricted to and may be provided for certain types of eligible travel as outlined below. This is only available if the employee has not been issued a credit card by the university to cover travel expenses.

The Banner General Encumbrance Maintenance Form (FGAENCB) and a Travel Authorization Request Form must be completed and approved to request a travel advance. A travel advance will not be issued if an employee has an outstanding advance. A transaction in process at the Comptroller's Office will not be considered outstanding.

i. Eligible types of travel

Student Group or Team Travel
Individual Student Travel
Athletic Recruiting
Admissions Recruiting

ii. Eligible travel expenses

Meals
Lodging
Fuel (rental vehicle only)
Registration Fees (pre-payment via requisition/PO)

iii. Clearance

- a. Travel advances will be charged to your employee/student account.
- b. Any unused funds must be remitted to the cashier with instructions to credit the funds to your account.
- c. Unused funds may not be retained for use for future travel.
- d. Unused funds may not be retained to cover unreimbursed expenses from prior travel.
- e. Travel advances must be cleared within 5 business days after the end of the date of travel.
- f. Travel advances not cleared within 5 business days will be payroll deducted.