

**Policy # 52004**



## **TRAVEL POLICY**

**Effective Date:** July 1, 2017

**Reviewed Date:** March 15, 2022

**Responsible Office:** Controller

**Division:** Finance

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### **I. PURPOSE/OBJECTIVE**

To establish guidelines to ensure adherence to the State of Louisiana Travel Guide (PPM 49) as set forth by the Division of Administration for the State of Louisiana.

### **II. STATEMENT OF POLICY**

#### **A. Travel eligibility**

To be eligible for official university travel in a state-owned, personally owned, or rented vehicle, an employee must meet the following criteria which are verified annually.

1. Pass the state's driver safety course (update required every three years),
2. Have a valid U.S. driver's license,
3. Employees must be listed on the Authorized Drivers List

#### **B. Travel authorization & approval notification**

1. Authorization to travel – All employees on official university travel anticipating incurring an expense associated with that travel must submit a “Request for Authorization to Travel Form” (travel request form) approved by all required personnel at least 10 (ten) business days prior to the date of travel. Until the form has been processed by the Travel Office and the traveler has been notified as such, a travel is not considered approved.
  - a. Advisors, consultants, contractors and other persons who are called upon to contribute time and service to the university who are not otherwise required to be reimbursed through a contract for professional, personal, or consulting services.

- b.** 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 shall be those authorized for state employees unless specific allowances are legislatively provided.
- c.** The Department Head or his/her designee is allowed to deem persons as an authorized traveler for official university business only. Note: College/University students must be deemed authorized travelers to be reimbursed for university business purposes.
- d.** For every travel authorization request, the “purpose of the trip” for travel, must be stated in the space provided on the front of the form.

A file must be kept containing all of these approvals.

- 2. 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. Employee should utilize a state vehicle when available.
- 3. Out-of-State-Travel – Travel to any of the other 49 states plus District of Columbia, Puerto Rico, the Virgin Islands, American Samoa, Guam, and Saipan.
- 4. International travel – International travel must be approved by the President or their designee, unless specific authority for approval has been delegated to a Department Head. International travel includes all travel to designations outside the 50 United States, District of Columbia, Puerto Rico, the Virgin Islands, American Samoa, Guam, and Saipan. Requests for approval must be accompanied by a detailed account of expected expenditures (such as room rate, date, meals, local transportation, etc.), and an assessment of the adequacy of this source to meet such expenditures without curtailing subsequent travel plans.
- 5. Open In-State travel - Open in-state travel authorizations may be submitted to and approved by the President or their designee unless specific authority for approval has been delegated to a department head.
- 6. Approval notification – The Travel Department will communicate approvals, denials, or adjustments to an employee’s travel request form via email.

**C. Funds for Travel Expenses**

- 1. Corporate Travel Card – Credit cards issued in a State of Louisiana employee’s name to be used for specific, higher cost official business travel expenses. All

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employee's that are required to travel frequently as a part of their university duties and responsibilities must apply for the State Sponsored corporate travel card to manage expenses incurred while on official travel. Application is made in the Controller's Office.

2. Travel Advance – Qualified employees may apply for and receive travel advances to manage travel expenses if the following criteria are met.
  - a. Eligibility – The following employees may be eligible:
    - i. State employee whose salary is less than \$30,000/year.
    - ii. State employees who accompany and/or are responsible for students or athletes for group travel advance. Note: In this case and in regards to meals, where there are group travel advancements, a roster with signatures of each group member along with the amount of funds received by each group member, be substituted for individual receipts. (This exception does not apply when given for only an individual employee's travel which is over a group.)
    - iii. State employees who accompany and/or are responsible for client travel.
    - iv. New employee who has not had time to apply for and receive the state's corporate travel card.
    - v. Employees traveling for extending periods, defined as a period exceeding 30 or more consecutive days.
    - vi. Employees traveling to remote destinations in foreign countries, such as jungles of Peru or Bolivia.
    - vii. Lodging purchase, if hotel(s) will not allow direct bill or charges to agency's CBA and whose salary is less than \$30,000/year.
    - viii. Registration for seminars, conferences and conventions.
    - ix. Any ticket booked by a traveler 30 days or more in advance and for which the traveler has been billed, may be reimbursed by the agency to the traveler on a preliminary expense reimbursement request. The traveler should submit the request with a copy of the bill or invoice. Passenger airfare receipts are required for reimbursement.
    - x. Employees who infrequently travel or travelers that incur significant out-of-pocket cash expenditures and whose salary is less than \$30,000/year.
  - b. Request – The request must be facilitated as follows:
    - i. A travel request form must be received in the Disbursements Office ten (10) business days prior to the date of travel.
    - ii. All supporting documentation, i.e. hotel quotes, student travel list, etc., must be attached.
    - iii. The field signifying an advance request must be clearly checked.

- c. Qualifying expenses – Meals and laundry services (athletics only) qualify for a travel advance.
  - d. Travel advances should be cleared within ten (10) business days.
3. CBA (Control Billed Account) – Credit account issued in the university’s name (no plastic card issued). These accounts are direct liabilities of the University and are paid by the University. CBA accounts are controlled through an authorized approver(s) to provide a means to purchase airfare, registration, lodging, rental vehicles, pre-paid shuttle service, and any other allowable charges outlined in the current State of Louisiana State Liability Travel and CBA Policy.
  4. Self-Funded – GSU Faculty and Staff can utilize their personal credit cards for individual travel for lodging, conference registration fees, and vehicle rental expenses should they not possess an active State Travel Card. Employees with an existing active travel card will be required to utilize the card for allowed purchases. Note: This is not allowed for group travel.
  5. Per Diem – A flat rate paid for meals in lieu of travel reimbursements for groups on extended stays only. Per Diem is not allowed for individual travelers.
  6. Meal Allowance and Lodging allowance (FOR REMIBURSEMENT PURPOSES, MEALS ARE NOT PER DIEM – ONLY THE MAXIMUM ALLOWED WHILE IN TRAVEL STATUS) – this is an allowance given to travelers with a minimum travel status of 12 hours. (We utilize the rates and schedule outlined in the Louisiana State Travel Guide).
  7. Receipts/Document Requirements – Supporting documentation, including original receipts, must be retained according to record retention laws.
  8. Routine Travel – Travel required in the course of performing his/her job duties. This does not include non-routine meetings, conferences and out-of-state-travel.

#### D. Transportation

Transportation Selection - When selecting a mode of transportation, the most cost effective means, should always be selected. Among the factors to be considered should be length of travel time, employee’s salary, cost of operation of a vehicle, cost and availability of common carrier services, etc. 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 and approved in accordance with these regulations. If a lesser cost effective means of travel is chosen, reimbursement will be made based on the most cost effective means.

For official in-state business travel employees should utilize a state vehicle when available.

No vehicle may be operated in violation of state or local laws. No traveler may operate a vehicle without having in his/her possession a valid U.S. driver's license. 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. In addition, an accident report form, available from the Office of Risk Management (ORM), should be completed as soon as possible and must be returned to ORM, together with names and addresses of principals and witnesses.

No person may be authorized to operate or travel in a state owned or rental vehicle unless that person is a classified or unclassified employee of the State of Louisiana; any duly appointed member of a state board, commission, or advisory council; or any other person who has received specific approval, and is deemed as an authorized traveler, on behalf of the university, from the Department Head or his designee to operate or travel in a university vehicle on official University business. A file must be kept containing all of these approvals.

Any persons who are not official state employees must sign an Acknowledgement of Non-State Employees Utilizing State Vehicles form, located on the university webpage or at the Office of State Travel's website, <http://www.doa.la.gov/pages/osp/Travel/forms.aspx> prior to riding in or driving a state-owned vehicle or rental vehicle on behalf of the State. The University is responsible for ensuring that this along with any other necessary documents and requirements are completed and made part of the travel file prior to travel dates.

Students not employed by the State shall not be authorized to drive state-owned or rented vehicles for use on official state business. A student may be deemed as an "authorized traveler" on behalf of the State by the Department Head or his designee to travel in a state-owned or rented vehicle on official state business. The Acknowledge of Non-State Employees Utilizing State Vehicles form acknowledging the fact that the state assumes no liability for any loss, injury, or death resulting from said travel must be signed as part of the approval process. A file must be kept containing all of these approvals.

1. Air Travel – All airfare reservations are to be scheduled through the state's contracted travel agency. Prior approval must be obtained from the State Travel Office to (a) make arrangements or purchases through another travel agency, or (b) purchase a conference package that includes airfare.
2. State Owned Vehicle – Use is authorized at the discretion of the appropriate department head. Unauthorized persons should not be transported in state vehicles. Approval of exceptions to this policy may be made by the Department

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Head if he determines that the unauthorized person is part of the official state business and the best interest of the University will be served and the passenger (or passenger's guardian) signs an Acknowledgement of Non-State Employees Utilizing University Vehicles form acknowledging the fact the University assumes no liability for any loss, injury, or death resulting from said travel.

3. Contracted Vehicles Rentals - The state has a contract for all rentals based out of Louisiana through Enterprise Rent-A-Car, which use is mandatory. Employees are required to rent a vehicle for travel destination greater than 100 miles from the University. Insurance on a rental vehicle is not required and is not a reimbursable expense.

The state has contracts for out-of-state vehicle rentals. Travelers shall use Hertz, Enterprise-Rent-A-Car, or National which is mandatory for business travel.

4. Personally Owned Vehicles
  - a. Travel must not exceed 99 miles round trip from the University
  - b. May **not** be used for team travel.
  - c. Mileage is reimbursed per the rate stated in the Louisiana State Travel Guide of no more than .51cents per mile.
  - d. Mileage shall be calculated using actual odometer readings or a noted mileage calculation software or web site, i.e. map quest
  - f. Reimbursable mileage shall be calculated using the university as a point of origin. An employee's office domicile may be used when (a) documented as necessary and having prior approval from the department head, or (b) the official domicile is closer to the destination
  - g. Multiple vehicle travel to the same point of destination is not reimbursable to all travelers (drivers/owners) unless documented, justified, and approved by the VP for Finance prior to the date of travel. *(The President may grant permanent waivers as deemed necessary.)*
  - h. The traveler bears responsibility for all operating expenses of the vehicle including fuel, repairs, and insurance.
  - i. 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.
5. Public Ground Transportation – Buses, subways, airport limousines, uber, lyft, and taxis are reimbursable when incurred as part of approved state travel. Original receipts are required for all claims in excess of \$15 per day. Airport shuttle limousines, taxis and all other public transportation where a receipt is available, requires a receipt for reimbursements. A driver's tip for shuttle/limousines and taxis may be given and must not exceed 15% of total

charge. Amount of tip must be included on receipt received from driver/company.

All other forms of public ground transportation, where a receipt is not possible and other than those listed above, are limited to \$15 per day without a receipt, claims in excess of \$15 per day requires a receipt.

6. Personal Use of Rental – Personal use of rental vehicle, when rented for official state business, is not allowed.
7. Gasoline (receipts required) – The State’s Fuel Card should be used for in-state gas purchases. This card can be obtained from the Property Control Office’s Asset and Fleet Manager. Reimbursements for out-of-state travel gas purchases require an original receipt and only regular unleaded gasoline, or diesel when applicable, should be used. This applies for both state owned and rental vehicles, as mid-grade, super, plus or premium gasoline is not necessary. An employee should purchase gasoline with the State’s Fuel Card or other credit card at reasonable cost from a local gasoline station prior to returning the rental. State Fuel Card should be returned along with all receipts to the Fleet Manager, located in the Property Office upon completion of the travel. Employees who have a University Corporate Travel Card can use it to purchase gas for out of state travel only. (see Travel Card Policy for details)

E. Meals

Meal Allowance- Includes Tax and Tips– Receipts are not required for routine meals within these allowances, **unless a cash advance was received**. Number of meals claimed must be shown on travel expense form. Partial meals such as continental breakfast or airline meals are not considered meals.

1. Single day meals
  - a. Must be in travel status for minimum of 12 hours
  - b. Amount limited by the State Travel Guide
  - c. Reimbursable as wages through the Payroll Office
2. Meal allowances **excluding athletics**
  - a. Receipts are not required for routine meals
  - b. Reimbursement amount is based upon the State Travel Guide
  - c. Includes tax and tips
  - d. Cost of meals shall be paid by the traveler and claimed on the travel expense for reimbursement.

3. Meal allowances **for athletics** – All individuals who travel in the athletic department, i.e. coaches, teams, and administration, must follow these guidelines for meal allowances.
  - a. Meals are limited to \$31 per day; \$7 for breakfast, \$10 for lunch, and \$14 for dinner.
  - b. Original receipts are required for all sit down meals with team
  - c. All per Diem allowances requires a signature for receipt of such funds on the Meal Allowance Receipt and must be with group travel. No per diem for individual travelers.

Note: If a meal is included in a conference schedule, it is part of the registration fee, therefore, an employee cannot request/receive additional reimbursement for that meal.

**F. Lodging**

The use of Hotel Planner is optional for State employees to book Hotels (Receipts are required). Employees should always attempt to use the tax exempt form located on the university web page and the State Travel Office website for all in-state lodging, <http://www.doa.la.gov/osp/Travel/hotels/hoteltaxexemption.pdf>. When traveling in-state on official state business, and must be used if hotel expenses are being charged to employee's State Corporate Travel Card, or the agency's CBA account. When two or more employees on official state business share a lodging room, the State will allow the actual cost of the room; subject to a maximum amount allowed for an individual traveler times the number of employees.

- a. Routine Lodging – The University will follow the tiered lodging rates detailed in the State Travel Guide.
- b. Conference Lodging – The President, Designee, Department Head, or Vice President may approve the actual cost of conference lodging, for a single occupancy standard room, when the traveler is staying at the designated conference hotel.
- c. Lodging will not be reimbursed for destinations that are within a 75 mile radius of the University, unless an exception has been approved by the Vice President for Finance prior to the travel date.

**G. Travel Expense Report**

All individuals are required to submit a "Travel Expense Report" within ten (10) business days from the return travel date. The required documentation must be attached for processing:

- a. All original receipts for lodging (zero balance receipt), transportation, meals, and other approved expenses.
- b. A copy of the conference agenda (if applicable), and
- c. A copy of the approved travel request.



- d. The traveler must provide receipts for all items paid by the CBA and Gas Card (i.e. conference registration, vehicle rental, lodging, and gas).
- e. Travelers have 3 business days to resolve any issue regarding their submitted Travel Expense Report after receipt of notification from the travel office.
- f. If the traveler cannot provide receipts or other supporting documentation for items paid by the CBA and Gas Card, the amount is considered a personal expense incurred by the traveler. The traveler will be required to sign a missing receipt form and must reimburse the University for the Total Amount of those charges. The traveler will have one pay periods to resolve the matter or the amount can be deducted from the traveler's paycheck.
- g. It must be signed by the person claiming reimbursement and approved by his/her immediate supervisor. In all cases the date and hour of departure from and return to domicile must be shown, along with each final destination throughout the trip clearly defined on the form.
- h. If an expense report cannot be submitted with ten (10) business days from the return travel date due to pending supporting information from 3<sup>rd</sup> parties, please document your attempt(s) to obtain the information and the date the information was actually received and this situation will be evaluated on a case by case basis.

**H. Conference/Convention**

A meeting (other than routine) 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, of registration fee. Participation as an exhibiting vendor in an exhibit/trade show also qualifies as a conference. For a hotel to qualify for conference rate lodging it requires that the hotel is hosting or is in "conjunction with hosting" the meeting. In the event the designated conference hotel has no rooms available, a Department Head may approve to pay actual hotel cost not to exceed the conference lodging rates for other hotels located near the conference hotel.

**I. No Reimbursement When No Cost Incurred by Traveler**

This includes but is not limited to reimbursements for any lodging and/or meals furnished at a state institution or other state agency, or furnished by any other 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.

**J. In-State Sales Tax –**

- a. For Travel Cardholders- If unauthorized state tax is applied to a Traveler Card purchase, the cardholder must request for the vendor to credit the tax to the card's next statement. If the vendor cannot do so, the unauthorized tax amount is owed by the cardholder to the University. The cardholder will have two pay periods to resolve the matter of the amount can be deducted from the cardholder's paycheck. If an unauthorized sales tax under \$25 is charged twice to the same cardholder, the taxable amount becomes the cardholder's

responsibility to repay the University if the vendor cannot issue a credit by the next statement. The cardholder will have two pay periods to resolve the matter or the amount can be deducted from the cardholder's paycheck. A Travel Card will be canceled if unauthorized tax is charged two times within a 12month period, regardless of the sales tax amount.

- b. For All Other Travelers- If unauthorized state tax is applied to a travelers purchase, the traveler must request for the vendor to issue a credit for the taxes. If the vendor cannot do so, the unauthorized tax amount is considered a personal expense incurred by the traveler. The University will not reimburse unauthorized tax charges to the traveler.

### **III. VIOLATIONS**

Individuals who violate this policy are subject to the following repercussions:

- A. Ineligible to receive travel advances
- B. Ineligible to travel
- C. Full travel advance amount payroll deducted
- D. Ineligible to receive reimbursement for travel expenses incurred
- E. Disciplinary actions

### **III. REVISION/REVISED HISTORY**

June 5, 2017- Revision Date