

LAMAR UNIVERSITY TRAVEL PROCEDURES

GENERAL POLICY

Rules and Regulations covering travel and travel reimbursement from state and local funds are governed by the Travel Regulation Act, Texas Government Code ANN, 660.021 (V.T.C.S. 1994) provisions of the latest Appropriations Act, official interpretations of the Travel Act by the State Comptroller of Public Accounts (State of Texas Travel Allowance Guide) and the Regents Rules and Regulations. Provisions of the Travel Allowance Guide apply to all officers, heads of state agencies, state employees and prospective employees incurring expenses when requested to visit a state agency, department or institution of higher education for the purpose of being interviewed and evaluated for employment. Additionally, separate regulations may apply to contract, grant and trust fund accounts. Any or all exceptions must be approved by Controller.

Travel for faculty and staff members of LU may take place only after proper administrative approval has been obtained in accordance with the travel regulations set forth in this manual.

Trips requiring absence from classes and their duties are permitted to the extent they stimulate professional interest and provide information and ideas related to the betterment of the University and its contacts. However, trips should not be approved until arrangements have been made by the absenting employee, which ensure the adequate performance of his/her duties during the absence at no additional expense to the University. The delegation of duties should also assure the undisturbed continuance of related University operations.

For official University travel, requests for travel must be properly submitted via the Travel Authorization form (See Exhibit) in sufficient time to receive final approval prior to the commencement of travel. Similarly, reimbursement for travel expenses will be dependent upon the accuracy, completeness, and expediency with which travel vouchers are submitted at the conclusion of a trip.

It is the responsibility of every employee to ensure travel regulations are followed and that all information relevant to travel reimbursement is presented accurately and in a true manner.

GENERAL OVERVIEW

The Travel Section of this manual primarily pertains to LU employees and prospective employees. The following items supplement this manual:

The State of Texas Travel Allowance Guide (Comptroller)

<https://fmx.cpa.state.tx.us/fm/pubs/travallow/index.php>

State Travel Management Program Website (Texas Building and Procurement Commission)

<http://www.tbpc.state.tx.us/communities/procurement/prog/stmp/state-travel-management-program>

Employees and prospective employees must use the Travel Authorization form and State of Texas Travel Voucher form. Per diem for travel to locations outside of the State of Texas follows the federal per diem guidelines.

Authorized travel expenses incurred by independent contractors, consultants, students (field trips), and teams/groups use different travel forms and procedures.

ABSENCE FROM USUAL AND REGULAR DUTIES

A. Allowable Purposes of Travel

Travel authorization will be granted employees and prospective University employees when it is clear the purpose of travel is for official University business. Purposes which may be considered include:

1. Travel which benefits LU such as,
 - Recruitment of staff and faculty, including travel of prospective University employees.
 - Recruitment of students within the State of Texas. (State funds cannot be used for travel related to recruitment of students outside the State of Texas.)
 - Representing LU in the various professional organizations which are a fundamental part of higher education. (Attendance at and participation in meetings is not a sufficient “purpose” for travel. Benefit to the University, its employees, or its students must be derived.)
 - Serving various segments of society which have traditionally called upon higher education for such functions.
 - Gathering information to be disseminated to students and employees which may improve instructions, research or other official University functions.
 - Performance of other duties which are of benefit to LU and are a part of the professional position held at LU (enhancing the prestige of an employee is not acceptable justification for travel).
2. Formal presentation of original research by an employee before a regional, state, national or international learned society.

B. Continuance of Duties

Travel authorization will be granted for official University business only when:

1. Appropriate provisions have been made by the absenting employee to have his/her duties carried out for the duration of the absence,
2. This delegation will provide for the continuance of associated University operations, and
3. This delegation of duties will not cause additional expense to LU.

FOREIGN TRAVEL

All foreign travel must be approved using the procedures described under the heading Travel Authorization form. All travel outside the United States, with the exception to travel to U.S. possessions and Canada requires final pre-approval of the President or his/her designee. Effective April 2010, Lamar University considers travel to Mexico foreign travel. The current travel warnings list can be accessed at United States of America Department of State Travel Warnings List.

Foreign travel may be reimbursed only if it has been pre-approved by the President or designee.

All LU foreign travelers should adhere to their respective protocols prior to, during and subsequent to their trips:

- . Students/Teams/Groups Protocol
- . Faculty-led Programs Protocol
- . Faculty/Staff without students: Complete the following documents and follow the routing instructions as indicated:
 - Travel Authorization
 - Foreign Travel Request Form

If the travel request is approved by all parties, the original travel documents will be forwarded to the LU Travel Coordinator in the Accounts Payable Office. Lodging and meals are subject to the “not to exceed” maximum per diem as published in the Federal Travel Regulations. Contact the LU Travel Coordinator (X8383) or go to Foreign Travel Per Diem Rates Guide for the precise per diem allowed. If the travel request is denied by any party, then all travel documents will be returned to the traveler with the reason for denial.

TRAVEL TO WASHINGTON D.C.

The General Appropriations Act, 76th Texas Legislature (Article IX, Section 9-6.31) requires state agencies with personnel traveling to Washington, D.C., to notify the Office of State-Federal Relations (OSFR) in advance of such travel.

The guidance outlined below clarifies travel purposes that are subject to the notification requirement.

Travel Requiring Notice: Only travel where the traveler will confer on legislative or appropriations issues with Congress, the Federal Government, their staff or officials requires prior notification to OSFR.

Accounts Payable will not process travel vouchers for trips to Washington, D.C., without the prior notification. Complete the notification form prior to travel to Washington, D.C. Copy of the confirmation and attach the copy to the traveler’s Travel Voucher to document that this requirement was met.

DESIGNATED HEADQUARTERS

For purposes of calculating per diem only, the designated headquarters for a LU employee assigned to the main campus is:

Lamar University
4410 Martin Luther King Parkway
Beaumont, Texas 77705

This includes the area within the corporate city limits of Beaumont if that employee maintains his/her official headquarters in Beaumont. Therefore, the time of an employee’s departure from, or return to, the city limits of Beaumont are the relevant times to be used in computing per diem.

ECONOMY AND EFFICIENCY OF TRAVEL

The administrative officer of each department is responsible for seeing that travel is conducted so as to achieve maximum economy and efficiency within the guidelines set forth in this section and for assuring duplicate travel vouchers are not submitted.

Should an employee receive an overpayment for travel expenses, he/she is to reimburse the University for such overpayment immediately.

Employees who must remain at their duty point (i.e., Saturday night stay) in order to qualify for low airfares may be reimbursed for their additional meals, lodging, rental cars, parking and other reimbursable expenses, so long as the savings incurred by the lower airfare exceeds the additional per diem expenses.

ADVANCE OF MONIES

A cash advance may be requested and received by the absenting employee only for travel which is to be reimbursed by the University.

Travel Cash Advances will only be issued for a trip involving Lamar University students, teams/sports or foreign travel.

Travel Cash Advances may be issued to current employees of Lamar University who meet all of the following conditions:

- The Travel Cash Advance will only be the amount anticipated for **meal cost of the student group or foreign travel**.
- The cash advance cannot be processed until the travel application has been approved.
- The trip will be reimbursed from funds other than state appropriation.
- The travel advance form must be complete and submitted to Lamar University Travel Office at least 72 hours prior to the date the advance is needed.
- The employee has no outstanding prior travel advance balances past due.
- Travel Cash Advances will not be processed for less than \$100.

Students or prospective employees may not request an advance. The cash advanced will be deducted from the Travel Reimbursement check. The Travel Expense Reimbursement form must be completed and submitted to the Travel Office within seven (7) working days after the trip is complete. Failure to do so may result in a Payroll deduction for the funds advanced.

TRAVEL AND RISK-RELATED ACTIVITIES RELEASE FORMS

The University's Release and Indemnification Agreement and Medical Information Release forms must be completed and signed by each student or member of the public prior to participating in University-sponsored travel or a risk-related activity.

There are separate forms for adults and minors and for foreign travel. In the case of a minor, the parent or guardian must sign the forms. A minor is any person who has not yet attained the age of eighteen (18). A student is any person presently enrolled in Lamar University.

A designated contact person in the academic or student affairs unit that is sponsoring the travel or activity must maintain the completed forms for a period of two years.

In those cases where participants in the travel/activity have multiple events and the persons participating do not change; each participant may complete the Medical Information and Release form once at the beginning of a semester. Participants must update information on the form, as necessary, prior to each trip/activity.

Applicability

These policies and procedures apply to all University sponsored travel and other activities associated with high risks that involve one or more students and members of the public. In general, the applicable travel/activities may be categorized as follows:

- Activities associated with organized courses or officially recognized independent study, either for credit (e.g., field trip courses) or non-credit.
- Activities associated with individual work or research off-campus; e.g., co-ops, internships, student teaching, and practica.
- Extracurricular activities including, but not limited to, intramural sports, intercollegiate athletics, and similar activities.

NOTE: This policy also applies to registered student organizations if the activity or event is organized and sponsored by LU and if travel to the activity or event is funded and undertaken using a vehicle owned or leased by LU. Registered student organizations may not require members to travel beyond 25 miles from LU.

Notifications

Students should be thoroughly informed through the catalog, the class schedule, and the course syllabus about all travel and other risk-related activities required by or associated with a credit course. For non-credit courses or programs, the course or program materials should provide this information.

Students and members of the public engaged in travel or other high-risk activities associated with the University should be informed of the nature of such risks prior to participating in the activity. An attachment to the Release and Indemnification Agreement that would be referenced on the form may be appropriate for this purpose.

Prior to each travel or other risk-related activity, the administrator of the unit sponsoring the activity must provide the Police Chief with the name of the faculty or staff member in direct charge of the activity, the name of a member of the unit not participating in the activity who can be contacted if needed, and, for travel-related activity, the names of the students and members of the public who are traveling.

For the risk-related activities not involving travel, the administrator must notify the Police Chief regarding the site of the activity and the approximate number of participants.

Incidents of a serious nature should be reported immediately to the administrator in charge of the sponsoring unit.

SAFETY ISSUES AND MODES OF TRAVEL

General

Circumstances such as terrain, road conditions, length of trip, etc., may make it prudent that students and/or members of the public go with available group transportation rather

than travel by personal vehicle. In some situations, it may be that travel with the group should be required. The faculty, staff member, and/or supervisor in charge of the travel should consider this issue as he or she would any safety matter. As with all of these issues, the use of caution and common sense are an important part of this process.

In all cases where an adult participant is permitted to choose to drive/ride in private transportation, that circumstance should be described in the Mode of Transportation line on the Release and Indemnification Agreement.

For minor participants, the key issue is giving notice to parents/guardians exactly how their child is to be transported to/from the activity. The Mode of Transportation information should provide notice. It would be best to limit the transportation of minors who are not accompanied by a parent/guardian to LU owned/leased/rented vehicles, or vehicles driven by LU employees acting within the scope of their employment. Such a requirement should be stated on the Release and Indemnification Agreement.

All Motor Vehicle Travel

The administrator of the unit sponsoring an activity involving travel for students or members of the public must ensure that the following safety precautions are followed:

- Seat Belts: Occupants of motor vehicles shall use seat belts or other approved safety restraint devices as required by law at all times when the vehicle is in operation.
- Weapons, alcohol, and illegal substances prohibited: Occupants of motor vehicles shall not consume, possess, or transport any weapons, alcoholic beverages, or illegal substances at any time when the vehicle is in operation.
- Passenger Capacity and Hours of Driving: The total number of passengers, including the driver, in any vehicle at any time it is in operation shall not exceed the manufacturer's recommended capacity.
- Driver Authorization: All University employees who drive University-owned vehicles or who drive a rental vehicle that is used to transport students must be certified by the LU Risk Management Office as having met the requirements for the authorization of drivers. This does not apply to employees who are driving rental vehicles on University business but are not transporting students.

TRAVEL VOUCHER

The State of Texas Travel Voucher must be submitted and approved for payment at the completion of a trip before travel reimbursement can be provided.

Travel expenses may be reimbursed only from those funds appropriated or authorized for travel. The Travel Voucher must reflect the benefits derived by LU.

Each portion of a trip must be listed on the "Record of Transportation and Duties Performed" section of the Travel Voucher and must include the following:

- The origin and destination of each portion of the trip,
- The means by which travel was accomplished,
- A statement detailing the purpose of the trip (see B2-110.0 for allowable purposes), and
- The fares paid, or personal car mileage accrued for each portion of the trip.

For the timely and efficient processing of travel reimbursements, Travel Vouchers must

be submitted to the Travel Coordinator in Procurement Management as soon as possible after trip completion but not to exceed thirty (30) days. Such vouchers may be presented as follows:

- Only after completion of travel.
- On a single trip basis for employees whose normal duties do not require full-time travel.
- On a weekly basis for employees whose normal duties require full-time travel or who make recurring local trips. As a convenience to such employees, Travel Vouchers may be submitted less frequently.

It is beneficial to the absented employee to submit the voucher as soon as possible after a trip is completed so that expenses incurred by that employee may be recovered in a timely manner.

When vouchers are presented for a specific trip or period, they should reflect the inclusive dates of travel. All reimbursable travel expenses and assignments must be included in the voucher. A Travel Voucher must be submitted within the following time periods, dependent upon associated criteria:

- When travel cash advance was given or when general funds are to be used or reimbursement, the Travel Voucher must be submitted within thirty (30) days after trip completion.
- Travel expenses applicable to one fiscal year must be submitted on a
- Travel Voucher no later than the second working day in September of the following fiscal year.
- Travel expenses applicable to contracts and grants should be submitted on a Travel Voucher no later than fifteen (15) days after the expiration of the grant or contract.

REQUIRED RECEIPTS

The following receipts must be attached to the Travel Voucher if the associated expenses are to be considered for reimbursement:

Transportation Receipts, i.e., those issued by airline, train or bus companies. NOTE: If the airline, train, or bus receipt is not available, proof of transportation will be accepted as outlined below:

- Copy of ticket along with a statement explaining why the original ticket is not available.
- If neither the actual ticket nor the copy is available, then the travel agency invoice, along with statement explaining why neither is available, must be submitted.
- If unable to provide proof outlined in a and b above, then credit card receipt, along with a statement explaining why neither is available, must be submitted.
- unable to provide proof outlined in a, b or c above, then a signed statement explaining why employee is unable to provide proof must be submitted.

Lodging Accommodations (both in-state and out-of-state): only single occupancy rates may be claimed. In cases where more than a single occupancy charge is reflected on the receipt, indicate the single occupancy rate on the receipt.

Car Rental

Group, Team or Student Receipts: Receipts must be obtained from each individual who

receives an advance allowance for commercial transportation.

TRAVEL EXPENSE REIMBURSEMENT

Final reimbursement of travel expenses will be based upon the travel being:

- Performed as official University business,
- In compliance with regulations set forth by the State Comptroller,
- In compliance with the Regents' Rules and Regulations and
- In accordance with LU policies set forth in this section.

Funds budgeted for travel may not be used for reimbursement of travel expenses incurred unless there is a statement on the Travel Voucher, submitted by the absented employee, which clearly identifies persons or places contacted and/or the nature of the official University business.

A. Reimbursement Authorization

The absented employee's department head or administrative supervisor must concur, by signature, on the voucher for the department, that travel expenses are accurate and honest.

B. Overpayment of Travel Expenses

If an employee receives an overpayment for travel expenses, he/she is expected to immediately reimburse the University for the amount of overpayment through the LU Accounts Payable Office. It is the employee's sole responsibility to ensure that any over reimbursement is returned to UTD or the appropriate third party.

C. Double Travel Expense Payments

A state employee may be reimbursed for travel expenses from non-state agency sources and from the State of Texas so long as the total reimbursement from all sources is not greater than actual expenses.

TRANSPORTATION ALLOWANCE

An employee traveling to conduct official University business by rented or public transportation is entitled to a transportation allowance equal to the actual cost of the necessary transportation to perform the official business.

A detailed list of all claims for rented or public transportation must be shown on the Travel Voucher under "Record of Transportation and Duties Performed." This includes all expenses incidental to the use of rental automobiles.

EXCEPTION: Personal auto insurance is not reimbursable.

PER DIEM

General Rules

Per diem is defined as a maximum daily rate of payment for actual expenses incurred for meals and lodging and may be reimbursed as a result of official University travel.

A. Conditions When Per Diem is Not Allowed

An employee may not receive payment for meals and lodging when the employee is:

- At his/her designated headquarters,
- Absent from his/her duty position for personal reasons (i.e., due to illness, family emergency, repairs to a personal automobile, etc.),
- Absent from his/her duties for any reason not connected with official University business, or
- Away from his/her designated headquarters when the travel does not include an overnight stay.

B. Personal Business on Official Travel

When an employee on official travel conducts business not connected with his/her official duties for the University, that employee must clearly show on the Travel Voucher that he/she is absent for personal reasons. The hour and date of departure from official business must be shown as well as the hour and date of return to official business.

C. Authorized Reduction of Per Diem Allowance

When conditions warrant, and based upon University established rates, persons authorizing travel may reduce the daily per diem allowance of an employee, provided that employee is notified of the reduction prior to incurring any travel expense.

The intention is that employees whose living costs are unusually low when engaged in official travel, such as those using camping facilities, staying with friends/relatives, etc., need not be paid the full per diem allowance.

Computation of Per Diem Allowance

For the purpose of calculating per diem only, an employee's designated headquarters is the area within the city limits of the town in which his/her headquarters is located or if not within the incorporated limits of a city then within a radius of five miles of the place at which the employee is required to maintain his/her official headquarters. Per diem is not payable for travel to any cities, towns or independent subdivisions surrounded by the employee's designated headquarters.

In computing per diem allowances, the actual time of departure from designated headquarters (city limits) and arrival to designated headquarters must be shown for each trip.

If an employee passes through his/her designated headquarters "nonstop" from one point to another, and this constitutes the shortest line of travel, he/she will be considered on continuous duty for purposes of per diem from the initial departure point to the destination.

A. Computation of In-State Per Diem

Effective 1/1/10, use the federal meal and lodging reimbursement schedule for in-state travel at the U.S. General Services Administration.

For areas not listed, the in-state rates are unchanged: up to \$85 for lodging and up to \$36 for meals. Reimbursements are based on actual expenses and are not a “flat rate”.

EXCEPTION FOR CONFERENCE HOTEL PER DIEM: When a LU traveler attends a conference, the actual expense for the conference hotel cost may exceed the federal per diem by up to 50% without requiring special approval. However, for travel on state funds, the reimbursement is limited to the Federal per diem by the U.S. General Services Administration. Any hotel expense overages for travel on state funds require local funds to be used for the difference between the Federal hotel per diem and the actual expense.

NOTE: Employees are exempt from paying the Texas State Hotel Occupancy Tax. Tax exemption certificates are available from Accounts Payable (Extension 8383) and should be presented to the hotel at the time of registration.

B. Computation of Out-of-State Per Diem

Meals and Lodging - Employees traveling out-of-state, within the continental United States, receive a locality-based allowance for meals and lodging. The locality allowance is the rate established in the Federal Travel Regulations used by federal employees. Employees traveling to localities not listed in the federal guidelines receive the median rates established in that state for meals and lodging.

Localities are defined as key cities within a state and may include the county the key city is in plus other surrounding counties. A locality includes all locations within or entirely surrounded by the corporate limits of the key city and the boundaries of any listed counties, including independent entities located within the boundaries of the key city and any listed counties.

The allowance rate equals actual lodging plus meals not to exceed the maximum amount set for each locality. Receipts for lodging are required. The rate for meals depends on the locality. The total amount set for meals and lodging may not be exceeded. A greater amount may be claimed for lodging but the meal claim must be reduced by the additional amount claimed for lodging.

C. Direct Billing of Lodging Cost for Conferences or Seminars

State agencies may be billed by commercial lodging establishments for the lodging expenses of their employees when attending conferences or seminars. This provision is effective only when an agency sends more than one employee to a conference or seminar. Reimbursement for lodging is limited to the maximum amounts allowed for lodging in-state and out-of-state.

EXCEPTION FOR CONFERENCE HOTEL PER DIEM: When a LU traveler attends a conference, the actual expense for the conference hotel cost may exceed the federal per diem by up to 50% without requiring special approval. Local funds must be used for the difference between the normal hotel per diem and the actual expense.

D. Daily or Weekend Return to Headquarters

An employee in travel status may return to headquarters daily or on the weekend instead

of remaining at duty point if the cost of returning to headquarters is less than or equal to the cost of remaining at duty point.

The lowest cost rule also applies to an employee who leaves one duty point and returns to headquarters before reporting to a new duty point.

An employee who is required to return to headquarters for state business is reimbursed for the actual cost of transportation. If more than one employee returns to headquarters in one of the employees' own personally-owned automobiles, the expense of each employee will be included in the comparison of mileage to duty point expenses.

E. Per Diem Not Payable

An employee may not receive meals and lodging when the employee is:

- At his/her official designated headquarters,
- Absent from duty point for personal reasons such as illness, family emergency or car trouble,
- Absent from duty point for any reason not connected with duties of the employee's agency, or
- Away from designated headquarters when the travel does not include an overnight stay.

The employee must show the hour and date of departure from duty point and the hour and date of return to duty point.

F. Discontinuance of Travel Due to Mechanical Failures

An employee may not receive per diem or mileage when state business is interrupted due to mechanical failure of a personal automobile. Once the automobile is repaired and the employee returns to state business, per diem and mileage may be claimed.

NOTE: All limitations/rules apply to local funds as well as state funds.

REIMBURSEMENT/NON-REIMBURSEMENT FOR OTHER TRAVEL EXPENSES

Other Travel Expenses

A. Dues and Registration Fees

1. Registration Fees -Reimbursement for registration fees, or similar expenses incurred when attending any type of organization or association meeting, will be made only if the associated membership is directly related to the duties performed by the employee and the type of conference attended. Receipt showing who paid and the form of payment must be submitted.

Meals and lodging may not be claimed in the registration fee except when the meals are included as a non-optional, incidental expense of the fee.

Entertainment or other personal items may not be claimed.

A registration fee can be paid in advance by a state agency but only if the fee is paid in the same fiscal year as the date of the conference. EXCEPTION: The registration fee may be

paid in advance and charged to the current year's appropriation if the request is made no earlier than six (6) weeks prior to the date of the conference. Every effort should be made to attend "paid in advance" conferences and with the approval of the supervisor one employee may replace another employee at the conference.

An employee initiating a Travel Authorization form should include the amount of the fee or dues in the total estimated cost of the trip.

If a registration fee must be paid in advance, the employee should use the following procedures:

- a. Must have approved travel authorization for period of meeting.
- b. Submit a Purchase Voucher at least one month in advance with the following information on voucher:
 - Place of meeting, along with the title of conference if there is one (no abbreviations), with justification statement explaining the necessity of paying the fee in advance.
 - Dates of meeting.
 - Amount of registration fee and for whom it is being paid. Usually there is a registration form to be filled out and sent with the University check.
 - Include Vendor's Tax ID# when using a state account.
- c. Retain backup material for all of the above and attach to the voucher.

It is the responsibility of the employee to obtain refunds in the event the trip to the meeting is canceled. Reimbursement will not be allowed unless the employee, or another employee designated by the department head, attends the meeting.

2. Membership Fees and Dues -Memberships in professional organizations must be in the name of the University and require written approval from the President or his designee prior to payment. Reimbursement for membership fees and dues in professional organizations will be made if there is a direct relationship between the duties performed by the employee and the organization. Receipts are required, with a justification statement explaining the necessity of paying the membership fee.

B. Other Reimbursable Travel Expenses

An employee may receive reimbursement for other travel expenses incurred in the performance of official travel, which includes but is not limited to:

- Phone calls for official business local and long distance.
- Money orders used for official business.
- Gasoline for rental or state-owned vehicles.
- Parking fees for personal vehicles, rental or state-owned vehicles.
- Toll charges for rental or state-owned vehicles.
- Repair parts and labor plus towing charges to repair state vehicles.
- Copies made by the employee that are required by the agency for informational or investigative purposes.
- Freight charges to ship state equipment or materials.
- Admittance fees to functions while accompanying clients of the state.
- Foreign Travel: Passport or visa charges, airport board passes, departure taxes in foreign countries and inoculations.
- Employees may be reimbursed in amount not to exceed \$25 for emergency purchases of

- postage. All other purchases for postage must be made payable to the U.S. Postmaster.
- Notary fees for official documents.
- Charges to exchange U.S. currency and vice versa. The exchange rate used for conversion of monies must be stated. Losses caused by exchange rate fluctuations are not reimbursable.
- Toll fees incurred on the use of a personally-owned or leased vehicle for the conduct of state business.

All of the “Other Traveling Expenses” should be detailed on page one of the Travel Voucher.

C. Non-Reimbursable Travel Expenses

An employee will not receive reimbursement for the following travel expenses:

- Tips or gratuities of any kind.
- Excess baggage charges for personal belongings.
- Kennel expenses for pets.
- Any other personal expense items such as cleaning or laundry.

SPECIAL TRAVEL REGULATIONS FOR OTHER THAN GENERAL FUNDS

Provisions of the preceding general travel regulations apply to all LU employees and all funds. However, if applicable, employees may travel under the auspices of contracts, gifts, grants, or designated funds, in which case they may elect to take advantage of the following exceptions:

A. Contracts

Travel allowances under research and other contracts, which are fully reimbursable, will be in accordance with the terms of the contract. However, if the contract does not specify travel allowances, then the general travel regulations will apply.

B. Gifts, Grants and Designated Funds

- For grants from, or derived from, federal or state agencies, travel allowances will be those specified in the general travel regulations.
- For all gifts, designated funds, and grants (other than those from, or derived from, federal or state agencies), travel allowances will be for actual expenses involving meals, lodging and airport parking fees not to exceed rates specified in the general travel regulations per day. This applies to both in-state and out-of-state travel. Lodging receipts must be submitted for reimbursement of claims. The transportation allowances will follow the provisions of the general travel regulations.

The provisions of B1 and B2 above are subject to the terms and conditions of the particular gift or grant involved, which may supersede the above provisions.

When not prohibited by specific terms, employees may be reimbursed for required registration fees or similar expenses incurred while attending meetings of organizations or associations. Receipts for such expenses must be secured and attached to the Travel Voucher if reimbursement is expected.

NOTE: A state employee may be reimbursed for travel expenses from both a non-state agency source and from the State of Texas so long as the total reimbursement from all sources is not

greater than actual expenses.

AUDITING OF TRAVEL

Each Travel Authorization form (travel request) and each Travel Voucher and other required forms will be audited by the LU Travel Office Any form submitted which does not satisfy the requirements and regulations set forth in this section will be returned to the appropriate department or claimant with an explanation on a Business Office Memorandum indicating items or discrepancies in need of completion or correction.

PROSPECTIVE EMPLOYEES

In its search to fill administrative and professional and faculty posts with highly qualified personnel, the University may invite certain candidates for on-campus interviews. An individual who is requested to interview with a state agency for the purpose of being interviewed and evaluated for employment may be reimbursed for travel expenses. In these instances, prospective employees are subject to the same travel policies which govern University employees and are required to complete a State of Texas Travel Voucher.

Prospective employees are reimbursed in the same manner as state employees except that they may not receive a travel advance. A prospective employee who has been accepted for employment may not be reimbursed for reporting to work.

Limitations

Prospective employees must report to the headquarters of the sponsoring agency.

Travel Arrangements

A Travel Authorization form must be completed.

Travel Reimbursement

Travel reimbursement for prospective employees is subject to the same policies that govern reimbursement for University employees. A Travel Voucher must be completed with appropriate receipts; i.e., airline ticket, lodging, etc. If receipts are not available, the prospective employee must follow the same regulations which govern University employees.

TRAVEL BY NON-EMPLOYEES, NON-PROSPECTIVE EMPLOYEES

The University will reimburse travel expenses for independent contractors, consultants, and student teams/groups if the travel has an approved business purpose and the travel is preapproved.

A. Travel by Individuals Identified as Consultants/Independent Contractors

Individuals hired by the University as consultants or independent contractors must be identified and approved. This requires that each individual be identified as a citizen, resident alien, or non-resident alien. The University is responsible for collecting federal income tax related to fees and travel paid to certain nonresident aliens. Reimbursement of fees and travel expenses incurred by consultants/individual contractors are reimbursed via the Purchase Voucher.

The traveler typically purchases their own ticket and is reimbursed when the University department submits an approved Request to Pay Vendor.

B. Travel by University Student Teams/Groups

Travel by University sponsored student teams/groups is authorized by the Team/Group Travel Authorization. If hotel rooms are to be direct billed, a Request should be presented in advance to the hotel and Accounts Payable.

Travel by non-employees should be preapproved by a Dean or Vice President.