

SUAREC



OFFICE OF FINANCE MANDATORY TRAVEL TRAINING

MS. BRUNETTA GAMBLE-DILLARD

VICE CHANCELLOR OF FINANCE AND ADMINISTRATION

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WELCOME OPENING COMMENTS

Introduction from the Vice Chancellor of Finance and Administration

Ms. Brunetta Gamble-Dillard



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LOUISIANA TRAVEL GUIDE

2022 - 2023

- The **Purpose** of the travel guide is to provide guidance and establish procedures for individuals that travel.
- The **Objective** is to make sure all travelers have a clear and consistent understanding of the policies and procedures.
- The **Goal** is to ensure compliance with the state travel policy.

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TRAVEL STAFF MEMBERS



Contact Us:

- Mrs. Frances Matthews – Program Administrator for Travel - Extension 3842
- Ms. Althea Thomas – Travel Coordinator – Extension 6201
- Mrs. Reika Johnson – Assistant Program Administrator for Travel – Extension 6290

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LA STATE TRAVEL GUIDE DEFINITIONS:

- **Contracted Travel Services** – The State has a contracted travel agency whose use is mandatory for airfare. The agency has an online booking system which can be used by all travelers for booking airfare. The use of online booking reduces the cost paid per transaction. Be sure to use Christopherson Business Travel see page 27.
- **Contracted Hotel Services** – The State has a contract for hotel services with Hotel Planner. Travelers are responsible for adhering to the hotel's cancellation policies when booking through Hotel Planner. If the traveler does not cancel in the time frame set by the hotel, the traveler is responsible for payment.

LA STATE TRAVEL GUIDE DEFINITIONS:



- **Contracted Vehicles Rental** – All rentals from Louisiana go through Enterprise Rent-A-Car. Out-of-State is Hertz, Enterprise, or National. Only the cost of a compact or standard/intermediate model is reimbursable unless non-availability is documented, or the vehicle has more than two persons traveling. This is mandatory. Enterprise Rent-A-Car Mandatory In-State vehicle rental base prices are located on page 29 of the manual.
- You must book car rentals online at <https://www.doa.la.gov/ost/transportation/ground-transportation>. Hertz Car Rental Out-of-State base rental prices are available on page 30.

Receipts are required on all rentals.

LA STATE TRAVEL GUIDE DEFINITIONS:

- **Reimbursement** – All claims for reimbursement for travel must be submitted on the State's Travel Reimbursement Form BA12, <https://www.suagcenter.com/page/faculty-staff>. The form must be signed by the person claiming the reimbursement and approved by his/her immediate supervisor.
- **Items not reimbursable** – Preferred or Premium seats on an airplane, penalties for cancellation of flight/hotel stay unless justification is provided by the department head. A comprehensive list can be found starting on page 10.





LA STATE TRAVEL GUIDE DEFINITIONS:

- **Meals** are not eligible for reimbursement on single day travel. On the first and last day of travel employees are **only** eligible for **75** percent of the total M&IE rate for the applicable travel location.
- **Meals and Lodging Allowances** – Meal rates are Per Diem. Only the maximum allowed while in travel status.
- **For Out-of-State** meal reimbursements use the GSA website.

<https://www.gsa.gov/travel/plan-book/per-diem-rates>

M&IE Breakdown

Find M&IE total and breakdown by meal for travel in the continental U.S.

- 1 Determine the location where you will be working while on official travel.
- 2 Look up the location-specific information at www.gsa.gov/perdiem.
- 3 On the results page, click Meals & Incidentals (M&IE) Rates to jump to the M&IE rates table.

I'm interested in:
- 4 Find the row for your specific location and note the amount listed for M&IE total, breakfast, lunch, dinner, incidentals, and first and last day of travel.

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THE TRAVEL PROCESS

Conference Lodging Allowance – Employees are allowed lodging rates, plus tax (other than State of Louisiana Tax) and mandatory surcharges. Receipts are required along with documentation showing the actual conference rate. If there are multiple designated conference hotels, the lower cost designated should be utilized, if available. In the event, the designated conference hotel(s) have no room availability, a Department Head or his/her designee may approve to pay the actual hotel cost not to exceed conference lodging rates for other hotels in the immediate vicinity of the conference hotel.

In the event a traveler chooses to stay at a hotel, which is not associated with a conference, the traveler is subject to making the reservation and being reimbursed within the hotel rates that will be allowed in routine lodging only. The traveler is responsible for the difference.



THE TRAVEL PROCESS

1. Resort fees are not allowed unless attending a conference and/or if a traveler is staying in a city that all hotels are charging a resort fee.
2. Tax Recovery charges, Service Fees and/or Booking fees are not allowed when booking through companies other than the State of Louisiana's mandated agency or their affiliated company.
3. Travelers will be responsible for reimbursing the Ag Center for any in-state taxes when the tax exemption form is not presented at the time of check in.
4. No reimbursements are allowed for functions not related to a conference, i.e. tours, dances, golf tournaments, etc.
5. If you are staying at a designated conference hotel or the overflow hotel(s), you may not rent a vehicle unless prior approval is granted from the Department Head. Rentals must be for official state business and need supporting documentation to be maintained in the file.

THE TRAVEL PROCESS



- All **International Travel** must be approved by the **Chancellor** and **President** prior to traveling.
- All documentation must be turned in 30 days prior to traveling or travel will not be approved.
- Currency conversions must be submitted from an official site upon returning from travel.

DOCUMENTATION NEEDED BEFORE YOU TRAVEL

- Travel Authorization – with all approval signatures.
- Itinerary
- Hotel
- Registration
- Rental Car – if needed.
- Tax Exempt form – for in-state hotel stays.





THE REIMBURSEMENT PROCESS

All claims for reimbursement for travel shall be submitted on the State's Travel Expense Form, **BA12**. It must be signed by the person claiming the 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 the final destinations throughout the trip clearly defined on the form.

1. Always submit approvals with all the necessary documentation, including complete line-item descriptions on receipts (both paper and electronic), in a timely manner.
2. Ensure all transaction's supporting documentation is complete. This includes **an approved Travel Authorization Form with all the needed signatures, and original itemized receipts.**

THE REIMBURSEMENT PROCESS



3. Receipts, and supporting documentation dates must correspond with the trip allowances and the Travel Authorization Form dates.
4. Please review receipts to make sure no state tax has been charged. If unauthorized tax is applied, the traveler must request that the vendor remove the charge. The traveler will be responsible for all state taxes.
5. If incidentals or extra charges such as room services, movies, extra day, etc., not associated with **SU Ag Center** business travel are charged, they must be settled during check out.
6. **DO NOT** use your personal credit card for any travel expenses.

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RESOURCES:



1. Meals and lodging allowances – page 27.

<https://www.gsa.gov/travel/plan-book/per-diem-rates>

2. Enterprise Rent-A-Car (In-State) – page 29.

<https://www.doa.la.gov/doa/ost/transportation/ground-transportation/>

3. Enterprise Rent-A-Car (Out-of-State) Vehicle Rates - page 29.

<https://www.doa.la.gov/doa/ost/transportation/ground-transportation/>

4. Hertz (Out-of-State) Vehicle Rates – page 30 - 31.

<https://www.doa.la.gov/doa/ost/transportation/ground-transportation/>

5. Hotel Planner – page 28. <https://www.doa.la.gov/doa/ost/hotels/>



RESOURCES:

6. Christopherson Business Travel – page 27.
7. Airfare instructions. <https://www.doa.la.gov/doa/ost/transportation/airfare-airport/>
8. Airfare Cancellations and Unused Ticket Use – page 12 and 13.
<https://www.doa.la.gov/doa/ost/transportation/airfare-airport/>
9. Parking Rates – page 28.
Baton Rouge Airport: \$4.50 per day for parking in the indoor/outdoor garage or lot.
<https://www.doa.la.gov/doa/ost/parking/>

ONLINE TRAVEL INFORMATION

- ✓ 2022 – 2023 Louisiana State Travel Guide
- ✓ LA DOA State Travel Guidelines and Procedures
- ✓ Hotel Lodging Tax Exemption Certificate
- ✓ LA Official Travel Expense Form BA12
- ✓ Travel Expense Account Form Instructions
- ✓ Travel Request



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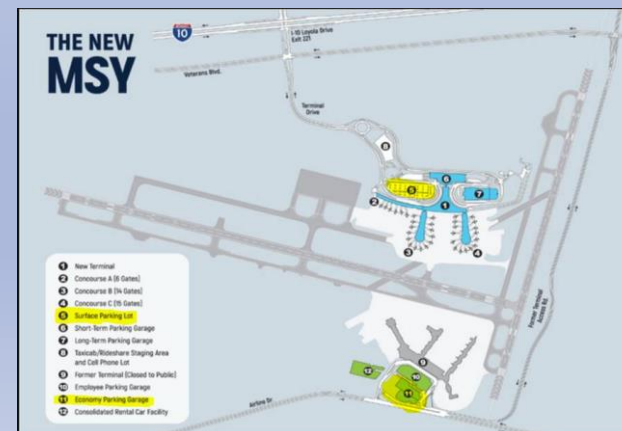
ROUTINE POLICY

- All domestic travel authorization forms must be submitted at **LEAST TWO WEEKS** before the travel date to allow sufficient time to purchase reasonable airfare. All international travel authorization forms must be submitted at **LEAST THIRTY (30) DAYS** before the travel date. **Effective immediately justifications are no longer allowed.**
- You must submit a travel expense form with original receipts to finance within **five (5) days of your return to receive reimbursement.** If you do not adhere to this guideline, you may be subject to the loss of the reimbursement and/or placed on travel suspension.
- Tax-Exempt forms must be picked up before departing for in-state hotel stays, please contact Mrs. Althea Thomas (Ext. 6201). **NO EXCEPTIONS**
- The Finance Office will be open Monday through Thursday to complete travel registrations, hotel accommodations, etc. by appointment only. Please contact Ms. Althea Thomas (Ext. 6201).

NEW ORLEANS AIRPORT PARKING



- Effective immediately, travelers will now have the option to park at the New Orleans Airport Parking and are no longer required to use US Park due to limited availability and hours of operation. The reimbursable options are listed below for a maximum of \$18 per day. (This does not include the short-term or long-term garages.)
- **Options:**
 - Surface Lot - \$18.00/day- located on airport property, #5 on the map below.
 - Airline Economy Garage - \$12/day- off property, #11 on the map below (method of payment - credit card only)
- <https://www.doa.la.gov/doa/ost/parking/>





AUDIT FAILURES / CORRECTIONS



- Traveling without prior approval.
- Travel documentation not being turned in on time.
- Travel card taken away!
- ✓ ALL travel must be approved by the Chancellor / President prior to submitting.
- ✓ ALL travel request must be turned in 14 days in advance for domestic travel and 30 days in advance for international travel.
- ✓ Failure to comply will result in travel being denied and non-payment for travel reimbursement.



QUESTIONS AND ANSWERS:

The full 2022 – 2023 Louisiana State Travel Guide can be found on the Finance Department's website.

<https://www.suagcenter.com/page/faculty-staff>

Thank you for your time and attention.

Coming Soon: 2023-2024 Updated Travel Policy

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