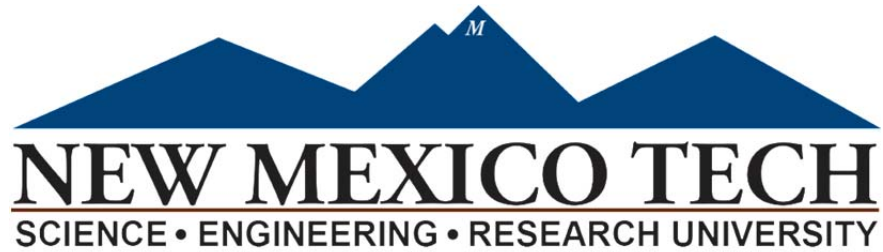


9/16/2019



# Travel Procedures

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NMT Faculty, Staff, and Students

New Mexico Tech Business Office  
Last modified XXXX XX, 201X

The purpose of this document is to establish guidelines for the Travel Reimbursement for New Mexico Institute of Mining and Technology's (NMT/NMIMT) Students, Staff, and Faculty.

This document is continually being updated; we would appreciate any information and/or insight that would help us develop documentation for NMIMT's departments.

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## I. Travel

### A. Faculty, Staff, and Students

This procedure is applicable to any New Mexico Institute of Mining and Technology (“NMT” or “NMIMT”) faculty, staff, and student (traveler) traveling on official NMT business with a destination greater than 25 miles away from either their designated post of duty or their home, whichever is closer to their destination. All NMT faculty, staff, and students who will be traveling should be familiar with the NMT Travel Procedures. Expenses that are not allowed will not be reimbursed.

Please note, travel procedures and the websites referenced in this procedure may change. All travelers who will be traveling on NMT business should frequently review these procedures and the information on the NMT Travel website. When a change is made, a notice will be sent to the NMT community.

The NMT President has the authority to waive parts of the Travel Procedures for faculty, staff and students so long as the waiver is not contrary to reimbursement rates, the procedure for travel advances or other requirement mandated by the Per Diem and Mileage Act, as modified by the New Mexico Tech Board of Regents in the Travel Policy and in accordance with the Act, for employees. A written request must be attached to the travel form for any exceptions to the Travel Procedures.

The Travel Office is located in Wells Hall, room 126. All forms are available on the Travel Office web page <http://nmt.edu/finance/travel.php>.

### B. Regents

The New Mexico Tech Board of Regents will follow the Per Diem and Mileage and Per Diem Act Sections 10-8-1 to 10-8-8 NMSA 1978 for travel related to their duties as board members. The Board of Regents will be reimbursed the in-state or out-of-state rates listed in Section - XVI Rates.

The Board of Regents has the authority to waive parts of the Travel Procedure for the NMT President, so long as the waiver is not contrary to reimbursement rates, the procedure for travel advances or other requirement mandated by the Per Diem and Mileage Act, as modified by the Board in the Travel Policy and in accordance with the Act, for employees.

### C. Penalties

Any public officer or employee covered by the Per Diem and Mileage Act who knowingly authorizes or who knowingly accepts payment in excess of the amount allowed by the Per Diem and Mileage Act or in excess of the amount authorized by the Governing Board pursuant to Section 10-8-5 NMSA 1978 is liable to the state in the amount that is twice the excess payment.

## II. Funding Sources

Regardless of funding sources per diem for meals on same day travel will **not** be paid by NMT. Same day travel is defined as any trip that does not include overnight lodging. Consecutive trips with different funding sources should be documented per day. Provide documentation showing the proper split of events and associated rates.

### A. State Funding

Travel supported by state funds will not exceed the NMT per diem and mileage rates established by the NMT Board of Regents in Section - XVI Rates. All NMT policies and procedures regarding travel reimbursement will apply to travel on all state funds.

### B. Federal Funding

This is only applicable to travel involving travel **directly** funded by Federal sources. Travel which is reimbursed from Federal funds will be reimbursed at the Federal rates, unless NMT rates are proposed and approved by the funding agency. When traveling on Federal funds, U.S. General Services Administration (GSA) maximums for per diem and lodging, i.e. Federal rates, apply. However, the use of those rates is administered under NMT policies and procedures, not the Federal Travel Regulations (FTR). The traveler is responsible for obtaining written advanced agency approval for actual lodging expenses that exceed the maximum allowable lodging rate. Written approval **must** be attached to the travel request which is submitted to Sponsored Projects Administration office (SPA), which will confirm agency approval for a specific trip.

Under select circumstances, a student may travel on a sponsored project, but not be compensated by said project. Travel without compensation is permissible under the following conditions:

- A budget provision has been made for student(s) traveling, but not employed on the project and the benefit of such travel to the sponsored agreement has been justified in the cost proposal (2 CFR 200.474 (b)(1)).
- Agency approval or written acknowledgement of the proposed travel has been obtained, either by agency acceptance of the proposal or by specific approval from an agency program official.

### C. Other Funding Sources

Per diem for travel which is reimbursed from non-state or non-Federal funding sources, such as institutional funds, will be reimbursed at the NMT established per diem rates, unless Federal rates are proposed and approved by the funding agency. All University policies and procedures regarding travel reimbursement will apply to travel on all funds including other sources.

Under select circumstances, a student may travel on a sponsored project, but not be compensated by said project. Travel without compensation is permissible under the following conditions:

- A budget provision has been made for student(s) traveling, but not employed on the project and the benefit of such travel to the sponsored agreement has been justified in the cost proposal.
- Agency approval or written acknowledgement of the proposed travel has been obtained, either by agency acceptance of the proposal or by specific approval from an agency program official.

### III. Travel Procedure

The official Travel Request and Reimbursement form is available on the NMT Travel web site. <http://nmt.edu/finance/travel.php> No other versions of the forms will be accepted.

When using the Travel Request and Reimbursement form please note that information entered on the Request is carried forward into the other forms.

Allow at least ten (10) working days for processing all payments.

#### A. Request

The Travel Request form must be completed regardless of whether or not reimbursement from NMT is requested or whether another entity is paying for the expense. This completed form serves as evidence that the traveler is on approved official NMT business and is thereby covered for liability under NMT's agreement with the State of New Mexico General Services Risk Management Division. Every NMT traveler MUST complete a TRAVEL REQUEST even if the traveler is using an official vehicle.

A travel request is an estimate of reasonable maximum expenses to be reimbursed. **THE TRAVEL REQUEST MUST BE APPROVED BY THE SUPERVISOR PRIOR TO DEPARTURE.** Upon receipt, the Travel Office will encumber the funds. If there is a delay in submitting the Travel Request to the Travel Office within five (5) days of travel, include a memo explaining the reason behind the delay is required. Travel reimbursement may be denied for travel undertaken, or travel expenditures incurred, without the requisite advance approval.

The following list gives the requirements for the travel request form:

- **Name** – Legible, full name of person who will be traveling
- **Banner ID #** – Nine (9) digit ID number
- **Citizenship/Status** – Check appropriate box. If 'Foreign National' is checked, the Student Reimbursement Questionnaire must be completed by NMT Students and attached to the Travel Request. The Travel Request must then be submitted to the Compliance Office for approval. See Section - XII Student Travel.
- **Travel Departure Point** – Enter the point at which the travel begins. For employees who commute, travel begins at the designated place of work or the employee's actual point of departure, whichever is closer to the traveler's destination.
- **Destination** - Enter the destination city or area as appropriate.
- **Date of Departure** – Enter the date on which the travel will begin. No more than one day prior to the event unless justification is provided.
- **Date of Return** – Enter the date on which the travel will end. This is not the date the traveler returns to work.  
 Example: If a traveler leaves on Wednesday January 17, 2018 and returns on Friday January 19, 2018, the date of departure is January 17, 2018 and the date of return is January 19, 2018. The date of return is not Monday, January 22, 2018.
- **Department** – Enter the traveler's department.
- **Contact** – Enter the name and email of the person that should be contacted with any questions regarding the travel request.
- **Index** – Six (6) digit Banner Index code

If the trip will be split among more than one Index, please make a note on the face of the Travel Request and attach the breakdown on a separate page. If the travel request is encumbered under one index the index may be modified on the Travel Reimbursement Voucher, but additional indexes may not be added and the split must be done through a Journal Voucher by the department.

- **Account** – Six (6) digit Banner Account code
- **Activity** – Enter Banner Activity code if applicable.
- **Total Estimate** – The total estimate is calculated based upon the data entered in the request. All expenses must be included regardless of method of reimbursement. This includes prepayments made by the traveler, prepayments made by NMT, and expenses paid by NMT purchasing card (PCard).
- **Reason for Trip** – Provide the reason for the trip and demonstrate that the travel is necessary. Supporting documentation detailing the importance of the travel/or conference must be attached such as a brochure, invitation, registration form, etc. The reason **must** show the benefit to NMT and/or the specific grant/contract being charged. If no documentation is available, specify how information about the trip was obtained (letter, telephone, contract, etc.). Include the following:
  - **Brief Title of Meeting or Event** – Provide a brief title of the event or meeting, such as “training for ethics in Albuquerque.”
  - **Purpose of Trip** – Explain why the travel is necessary and what will be gained by traveling.
  - **Benefit to NMT** – Explain how the purpose of the travel benefits NMT.

Complete each section of the Travel Request. Errors in selection will result in fields not populating. The yellow boxes with the T or Travel Number are for the Travel Office use only.

- **Per Diem** – Select either NMT or Federal Per Diem if applicable. If NMT lodging is selected indicate if this is an in state or out of state travel. If Federal Per Diem is selected fill in the applicable amounts allowed for the area of travel. Periodically the Per Diem is reduced, check for Reduced (M&IE) Rate and indicate the amount and number of days. If meals are provided this will be accounted for on the Travel Reimbursement Voucher.
- **Hotel** – If actual amount is being claimed, do not select lodging in the Per Diem section. Indicate the rate per night. If a PCard is used select the PCard box.
- **Airfare** – Indicate the method of purchase and the amount of the airfare. If paid by NMT it is arranged through the travel agency and charged to NMT. The service fee charged by the travel agency should be included in this amount.
- **Mileage** – Indicate if an Official or Private vehicle is being used. Note the standard miles, which is round trip mileages for common locations around New Mexico. The standard miles list is on the travel website <http://nmt.edu/finance/travel.php>.
- **Ground Transportation** – Indicate types of ground transportation may be utilized and estimate the amount.
- **Registration** – Select one type of payment method used for the registration and amount. Fill in the Vendor Name.
- **Miscellaneous** – Estimate the amount of miscellaneous expenses anticipated for the travel.

If an advance is requested, check the advance allowed box. The Traveler may request an amount lower than the advance allowed by selecting the box for the lower amount and inputting the amount being requested.

Zero Reimbursement Travels are Travel Requests that will not require reimbursement from NMT. These must be completed and approved just like all other travel requests. Zero reimbursement Travel Requests do not need to be submitted to the Travel Office, unless the travel request was submitted with an estimate resulting in an encumbrance. However, departments should retain the Zero Travel Forms for a minimum of three (3) years after the travel has been completed.

## B. Prepayments

Prepayments to be made with NMT funds should be noted on the Travel Request form with all appropriate documentation attached (such as invoices, registration forms, calculation of advance amounts, etc.) by using the prepayment check boxes.

Payments made by the traveler using personal funds prior to a trip (i.e. airline fare, registration) will be reimbursed at 100 percent. A copy of the registration and proof of payment and/or receipts must be attached. These payments will be processed when the travel request is received and approved. The traveler may also elect to receive all reimbursements upon completion of the trip.

## C. Advance

Requests for a travel advance are listed on the Travel Request form. Travelers may obtain up to a ninety (90) percent advance of the submitted expenses, less any prepayments, on trips requiring a stay of 24 hours or more. A lesser amount may be requested by selecting the reduced advance requested box. Advances will be released not more than five (5) working days prior to the trip.

## D. Travel Reimbursement Voucher

A Travel Reimbursement Voucher should be submitted within ten (10) working days after completion of the authorized travel. Travel reimbursements issued greater than ninety (90) days, per the IRS Accountable Plan, after a traveler returns become taxable to the traveler and will be forwarded to the Payroll Office for tax withholdings. **DO NOT SUBMIT THE TRAVEL REIMBURSEMENT VOUCHER WITH THE TRAVEL REQUEST FORM.** Employees and/or students will be reimbursed for only their personal allowable expenses. Each traveler must submit an approved travel request and reimbursement voucher in order to be reimbursed for their expenses. The only exception to this will be for student groups traveling with a NMT faculty or staff member. Please refer to Section - XII Student Group Travel Procedures.

A completed Travel Reimbursement Voucher must be submitted with all original receipts or copies if paid by NMT PCard and appropriate forms attached. Deduct prepayments for advances, airline tickets, hotel payment, registration, etc. (If registration includes meals or lodging, deduct according to Section - XVI Rates.)

Allow ten (10) working days for reimbursement vouchers to be processed after they are received in the Travel Office. The encumbrance will be cleared upon the completion of travel and the final payments have been made.

A Travel Reimbursement Voucher having a net reimbursement of up to \$100.00 may be received as petty cash provided:

- All applicable requirements are followed according to the travel guidelines, including a pre-approved travel request.



- A completed Travel Reimbursement Voucher is submitted to the Travel Office. The Travel Office will notify the traveler when the reimbursement is ready to be picked up.
- Petty cash will be paid at the cashier's window.

If funds are to be refunded to NMT by the traveler, a check must be attached to the travel reimbursement voucher. Do not deposit the funds directly into the account. The Travel Office will verify the figures and deposit the payment. If there is a correction, the Travel Office will contact the traveler to have the payment adjusted.

Once a travel has been processed add-ons or additional found receipts will be processed within fourteen (14) working days after the submission of the Travel Reimbursement Voucher. Reimbursement for travel completed in a previous fiscal year will be processed one month into the new fiscal year (July 31st). After that date, all outstanding travel will be considered to have been cancelled, any outstanding encumbrance will be closed and no further reimbursements will be made. If an advance or prepayment has been made the traveler **must** provide a reimbursement voucher or reimburse NMT for those advances.

Complete all sections to account for all travel expenses, even if they were prepaid, reimbursed or paid on the PCard.

- **Per Diem** – Indicate what type of rate is being reimbursed and if lodging is being requested.
  - Reduced NMT rates are allowed if specifically requested.
  - Do not indicate lodging if actual hotel is being reimbursed.
  - If meals were provided complete the Meals Provided worksheet.
- **Hotel** – Indicate the amount for hotel less any personal expenses and other services provided.
- **Airfare** – Indicate the method of purchase for the airfare and include the cost of the airfare.
- **Mileage** – Provide the standard mileage or mapped mileage if using a private vehicle. Attach a map when using the mapped mileage distance.
- **Ground Transportation** – Input amounts for ground transportation. Indicate if a PCard was used.
- **Registration** – This amount will transfer from the request. If any additional amount was paid indicate the amount in the Paid by Traveler field.
- **Miscellaneous** – Indicate what was purchased, the amount, and if a PCard was used. If the PCard was not used do not check the box.
- **Subtract Prepayment(s), NMT PCard Payments and Advances** – This amount will transfer from the request. If any additional amount was pre-paid, or not, this can be corrected by using the other adjustments line or the miscellaneous fields.
- **Subtract Other Adjustments** – If any other amount needs to be adjusted indicate the amount and attach an explanation.
- **Special Instructions** – Indicate any special instructions needed for the Travel Office, such as changing the index.
- **Mail To** – Indicate if the reimbursement is to be mailed to any other location besides the department. If left blank payment will be routed to the department listed on the travel.

## E. Corrections

Travel forms must either be typed or printed in ink. Do not use pencils. Any corrections to a Travel Request or a Travel Reimbursement Voucher must consist of a single line drawn through the incorrect item and the corrected information placed above. The requestor **and** approving official **must** initial **each** correction.

## F. Approvals

The traveler will be reimbursed for official NMT travel approved by authorized personnel. The department is responsible for acquiring all required approvals before the Travel Request and Travel Reimbursement forms are submitted to the Travel Office for processing. In no event may the traveler approve their own travel. Signatures are defined as:

- **Requestor** – Signature of traveler
- **Dept./Division Head and/or PI** – Signature of the traveler's department/division head or the Principal Investigator of the grant/contract. If multiple indexes are listed, multiple approvals may be required.
- **Vice President or Associate VP** – Authorized signature is required for actual lodging is requested.
- **President** – The President of NMT must approval all international travel.
- **Dept. Concur Box** – Departments may use this box for additional internal review(s) or approvals that they may require at the Department Level.

Prior to sending the request to the Travel Office the individual with budgetary authority for the funds (principal investigator and/or account administrator) must approve the request. By signing the document they are ensuring that they have reviewed it and checked that proper documentation is attached (where applicable). The PI/account administrator should verify the following items:

- Index and account code for all expenses. In the event that expenses will be split among more than one index/account the information should be noted in the 'Special Instructions' area and, if necessary, a memo can be attached listing the index/account codes to be used with the amount for each.
- Departure and destination locations (for mileage reimbursement).
- Reasonable estimated expenses.
- Reason for Traveling including:
  - Brief Title of Meeting or Event
  - Purpose of Trip
  - Benefit to NMT
- Compliance with NM Tech's travel procedures.
- Availability of funds in the budget.

The grant administrator overseeing the grant or contract will verify approval on all travel requests submitted for any sponsored project. When requesting Federal per diem rates the grant administrator will indicate agency approval on the travel request. If the agency has not approved the use of Federal rates the Travel Office will return the request to the originating department for correction. Approval is obtained and tracked by the SPA which then enters a notation into the Banner system using FOATEXT located in FRAGRNT.

The Vice President or Associate Vice President approval is required for actual lodging expenses being claimed. Prior approval must be obtained from the President for all international travel. Requests must be submitted to the President's Office at least two to three (2-3) weeks prior to the planned date of departure. If requests are received without all the required approvals, the Travel Office will forward the documents to the appropriate office to obtain the manual approvals. This will result in a delay of processing any payments (such as advances, prepayments and final reimbursements).

Upon entry, all Travel payments will be routed electronically for approval. Approval routing includes:

- Division approval from the financial/business manager of the division.
- Business office accountant approval.
- Additional approvals may apply.

Electronic approval by the financial/business managers of the division and business office accountants include review of the payment for all of the following:

- Travel is allowable and funding is available.
- Appropriate index and account are being used.

Once the document has been approved at all levels, Banner will forward the payment for posting. The payment will be made on the next check run.

## G. Receipts

Original receipts are required on all non per diem amounts to be reimbursed. All receipts must be identifiable as to payee, nature, and amount of expenditure and payment. Any information not given by the receipt must be added by the traveler and attested to by a signature on the receipt. If the original is not available an explanation of why it is necessary to use a copy must be submitted, unless it is a PCard receipt. Do not highlight information on invoices, always circle it. (The ink disappears from the receipts and the amounts become illegible.) Receipts or invoices smaller than an 8 ½ x 11 sheet of paper:

- Secure to 8 ½ x 11 inch sheet of paper.
- If using recycled paper, please X out the reverse side information that does not need to be imaged.
- Tape must be used to secure the receipt. Tape across the top and bottom of the receipt. Do not tape over totals/figures or business names. (The tape will cause the ink to disappear from the receipts.)
- Do not write on the back of the receipts. If two sided make a copy and attach.
- For long receipts, the receipt may need to be cut to fit length wise on an 8 ½ x 11 paper. Multiple pages can be used. Do not fold the receipt.
- Please do not write over receipts or invoice totals. The information can be written beside the receipt on the paper.
- When information must be changed, line through the information and make the correction. Initial all corrections.

Occasionally a receipt may be misplaced or unobtainable from a service provider. If this happens, the traveler must complete the No Receipt Cost Statement detailing what and how much the expense was and why there is no receipt. This form requires the traveler's signature and the approval of their supervisor or PI. The form is located on the Travel Office website <http://www.nmt.edu/finance/travel.php>. Please note that a credit card statement may be used in lieu of a receipt to document some transactions, please check with the Travel Office to determine specific allowability.

## H. Automatic Deposit

NMT faculty and staff have access to automatic clearing house (ACH) or automatic deposit into an employee controlled account through FIS Integrated Payables (FIS). Contact the Travel Office via email to request this option. Once an account is setup through FIS all reimbursements will be made directly to this account.

## IV. Per diem

All per diem, mileage and meal reimbursement rates are established by the Board of Regents of NMT in accordance with the Per Diem and Mileage Act. Departments may elect to reimburse at an amount less than any of the provided University rates and the reason must be documented with the travel request. A traveler may elect to be reimbursed at a lower rate regardless of the funding source by documenting on the Meals Provided Form.

### A. Per Diem: Domestic Travel

See Section - XVI Rates for the allowed per diem rates. Meal reimbursement is limited to the allowed amounts without receipts for each full 24-hour period. If meals are provided they must be reduced based on the meal provided. See Section - VI Lodging when actual lodging is selected.

### B. Per Diem: Federal Travel

Per diem for travel which is funded and reimbursed from Federal funds only will be reimbursed at the Federal rates, unless proposed and approved at NMT rates by the funding agency. All NMT policies and procedures regarding travel reimbursement will apply to travel on all funds including Federal sources.

The requester must print the federal M&IE rates from the web-site and show the calculation for per diem. The print out and calculation **must** be attached to the travel request.

Any amount in excess of allowable Federal per diem rates must be reported as taxable income to the recipient on the annual W-2 form. NMT does not have the resources to track and report such amounts and therefore will not reimburse amounts in excess of maximum allowable Federal per diem rates.

### C. Per Diem: International Travel

In addition to the actual cost of lodging (see Section - VI on Lodging), a meal reimbursement not to exceed allowed amount in Section - XVI Rates for each full 24-hour period is allowed without receipts. Lodging rate is limited to In State rates if actual cost of lodging is not provided.

### D. Same Day Travel

Same day travel is defined as any trip that does not include overnight lodging. Per diem will not be paid on trips of less than 24 hours regardless of the funding source. If paid, such per diem would be a taxable fringe benefit and as a matter of NMT Procedure is not tracked and reported.

### E. Provided Meals

Periodically a meeting or other event is held in conjunction with travel. The Traveler should reduce the meal per diem when meals are provided by the required amount for each meal as defined by Section - XVI. If the Traveler is requesting a meeting reimbursement for the cost of the meals, process the reimbursement following the Accounts Payable Direct Payment and Purchase Order Manual for employee reimbursements. See Accounts Payable website: <http://www.nmt.edu/finance/accounts-payable.php>

Continental breakfast provided at a hotel, or by a conference, does not require a reduction in per diem.

**F. Paid by Another Source**

Periodically another source will pay for meals and lodging. See Section - XVI Rates for reduction amounts for meals and reduce the lodging per diem by the number of days provided.

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## V. Mileage and Other Transportation

### A. Private Vehicle

Travelers will not receive mileage reimbursement when a private vehicle is used and the trip is less than 50 miles round trip (25 miles one way). Carpooling is encouraged and reimbursement is limited to one (1) traveler. See Section – XVI for the rate.

Travelers on official business in privately owned vehicles are eligible for mileage reimbursement using the mileage reimbursement rates in accordance with the Internal Revenue Service standard rates applicable at the time of the travel. Mileage reimbursements are intended to cover all expenses related to use of the vehicle, such as gasoline, repairs, etc. NMT PCards or gasoline cards may not be utilized when purchasing fuel for personal vehicles.

For mileage over and above the established mileage schedule, attach a map with the trip starting and ending locations. A mileage chart for New Mexico cities and other frequent travel destinations is provided on the NMT Travel website for your reference. <http://www.nmt.edu/finance/travel.php>

For out-of-state mileage, the standard mileage as reported in the Rand McNally U.S. Road Atlas (or equivalent source) may be used. If claimed mileage appears unreasonably high, a written justification must be attached. See Section - IX Travel Comparison.

### B. NMT Official Vehicle

Travelers will not receive mileage reimbursement when an official NMT vehicle is used. Other travel related expenses (gas, minor repairs, etc.) can be reimbursed with the appropriate receipts. The vehicle ID number should be noted on all receipts submitted for reimbursement. If an employee has a car allowance they are entitled to be reimbursed for the fuel related to business travel by attaching original receipts to the Travel Reimbursement Form. When a car allowance is provided mileage will not be reimbursed.

### C. Airfare

Airfare may be purchased through one of the Regents-approved travel agencies or purchased directly by the traveler using personal funds. NMT will reimburse or pay the cost of commercial airline travel, including customary fees, at the lowest available rate that meets business needs. Travelers may upgrade accommodations at their personal expense. Travelers are prohibited from selecting travel arrangements that result in an increased cost to NMT for the purpose of earning or increasing travel rewards or incentives. See Section - III Travel Procedures B Prepayments for reimbursement information.

If using a Regents-approved travel agency, call as early as possible to obtain the lowest fare. The contact information for the approved travel agency is provided on the NMT Travel website for your reference. <http://www.nmt.edu/finance/travel.php> Companion flights will be allowed only for NMT employees or students. The Travel Request must be turned into the Travel Office before the Travel Agency will release the ticket. The travel agency will bill NMT.

When Traveling on Federal funds (externally funded agreements using Federal funds) it may be required by 49 U.S.C. 40118, commonly referred to as the "Fly America Act," to use United States air carrier service for all air travel and cargo transportation services funded by the United States Government. Information

is located at the GSA's website <http://www.gsa.gov/portal/content/103191> all other NMT Travel Procedures apply. The traveler must provide documentation that the airline meets this requirement.

A purchase using personal funds is an agreement between the traveler and the vendor. If the traveler does not turn in an approved Travel Request, the traveler is responsible for payment. Reimbursement will not be made for use of travel incentives or any other reward points to obtain airfare.

If an airline trip is cancelled or the ticket is changed, the traveler will state the reason for the cancellation or change in writing. NMT will not be responsible for payment or penalties imposed by agencies if cancellation or changes are due to personal reasons. If the traveler feels that an exception to this provision should be granted then a written request should be submitted to the Associate VP for Administration and Finance or VP for Administration and Finance. The individual responsible for the index from which payment would be made must approve the request before it is submitted for consideration.

Charges will be reimbursed when it is necessary to hire a licensed pilot to fly a private aircraft (i.e., air taxi). Reimbursement will not exceed \$0.88 per air mile.

See Section – IX Travel Comparison when using a private vehicle in lieu of airfare

#### D. Rental Car

Rental car may be purchased through one of the Regents-approved agencies or purchased directly by the traveler using personal funds. NMT will reimburse or pay the cost of rental car, including customary fees, at the lowest available rate that meets business needs. If using the approved agency provide the NMT contact information and select the insurance included rate. Travelers may upgrade accommodations at their personal expense. Receipts must be submitted with the Travel Reimbursement Voucher.

The contact information for the approved agency is provided on the NMT Travel website for your reference at <http://www.nmt.edu/finance/travel.php>. Also located on this site are the negotiated rates with insurance included.

- **Additional Rental car insurance** – Only coverage related to property damage and/or theft, as well as coverage for uninsured motorists, should be accepted. Coverage related to liability should be declined as this is covered by the NM State Risk Management. NMT employees are covered under New Mexico Risk Management for both auto liability and auto physical damage with comprehensive and collision insurance. This coverage extends to all vehicles rented within the continental United States. Liability is limited by the Tort Claims Act.
- **Rental Vehicle Class** – Vehicle rental of economy sized car is allowable. Exceptions may be made if there is a valid business need to upgrade to another vehicle type or larger vehicle. Exceptions must be supported by justification and included with the traveler's Reimbursement Voucher.

See Section – VIII Miscellaneous Expenses.

#### E. Other Transportation

OTHER transportation includes bus, taxi, ride sharing services, airport shuttle, and railroad. Receipts must be submitted with the Travel Reimbursement Voucher. See Section - VIII Miscellaneous Expenses.

## VI. Lodging

Reimbursement of actual lodging costs, or best estimate of the amount, must be approved in advance on the Travel Request form by an Associate Vice President, Vice President, or President.

### A. Allowable Lodging Fees

Travel reimbursement for lodging is limited to the applicable lodging per diem at the destination. The actual cost will be reimbursed for lodging at an official conference or meeting hotel. Customary taxes and required resort fees will be reimbursed. The original receipts are required. For personal days see Section - X Personal Expenses.

### B. Unallowable Fees

Deduct all meal and other charges from the lodging receipt that are not related to lodging. See Section - VIII Miscellaneous Expenses. If the hotel provides a complementary credit, account for the credit independently of the lodging expenses. This credit cannot be included in the Purchasing Card charges and used for unallowable services. If necessary, reduce the per diem accordingly.

### C. Federal Lodging

When traveling on Federal funds, GSA maximums for lodging, i.e. Federal Rates, apply. However, the travel is administered under NMT policies and procedures, not the Federal Travel Regulations.

The traveler is responsible for obtaining written advanced funding agency approval for actual lodging expenses that exceed the allowable Federal rate. Written approval **must** be attached to the travel request prior to SPA approval.

### D. Other Lodging

If lodging with friend(s) or relative(s) you may be reimbursed for additional costs your host incurs in accommodating you only if you are able to substantiate reasonable costs. You will not be reimbursed the cost of comparable conventional lodging in the area or a flat per diem amount.

Nonconventional lodging may be reimbursed up to the cost of other types of lodging when there are no conventional lodging facilities in the area or the facilities are in short supply.



**VII. Registration and Conference Fees**

To prepay the registration related to the travel directly to the vendor, enter the name of the vendor, the amount and attach the vendor invoice. The department is responsible for confirming that the Vendor being paid is established in Banner. If a Travel Request is received in the Travel office without an established vendor ID, the paperwork will be forwarded to Purchasing Services to have one established. This will result in a delay of the payment.

If the traveler prepays the registration fee, a receipt must be attached with the Travel Request if prepayment reimbursement is requested. If prepayment is not required, attach the receipt to the Travel Reimbursement Voucher.

Documentation must include a cost breakdown of services included in the fee, such as meals. If registration fees include meals and/or lodging the per diem will be reduced by the require amounts. If a traveler is provided with three (3) meals as well as lodging for each 24 hour period, no per diem will be allowed. Justification must be provided if there is an exception to the meals. See Section – XVI rates for the amounts to reduce per diem for meals and lodging if included.

## VIII. Miscellaneous Expenses

### A. Other Expenses

Other necessary business related expenses may be required that can be documented as costs directly incurred as a result of the travel and will be reimbursed when original, itemized receipts are provided. These include:

- Parking
- Tips (exclusive of meal gratuities) not to exceed 20% of the allowable purchase
- Business calls or business telephone access charges only
- Copying charges
- Other business expenses

Fee or Expense	Customary Allowed	Exceptions
Baggage/luggage Fee	1 Standard Allowed	Additional baggage or overweight limit not allowed, unless documented need for supplies or additional luggage.
Early Check-in	Not allowed if there are associated fees charged.	None
Extra leg room	Allowed if flight time <sup>1</sup> is 8 or more hours (14 hours Federal funding)	Doctor's notice or medical need
Seat upgrades	Allowed if flight time <sup>1</sup> is 8 or more hours (14 hours Federal funding)	None
Seat Selection	1 Standard if selection is required	Seat selection may be required such as on an international flight. Fees for selecting a seat are limited to the required customary amount.
In-flight technology	Not allowed if there are associated fees charged.	Business purpose documented and approved
Flight change	Not allowed	Business purpose documented and approved or traveler emergency documented and approved
Travel companion	Not allowed	Medical necessity
Other	Not allowed	Other fees not listed will require Vice President or Associate VP Approval

<sup>1</sup> Flight time is defined as the boarding of the originating flight to the ultimate arrival point including scheduled non-overnight time spent at airports and plane changes. This does not include travel to and from airports.

### B. Non-Employee Expenses

If travel related expenses are charged to NMT for non-employees, a memo must be submitted by the department to support the billing and payment. The memo must contain the traveler's name, description of the charge, amount of charges, index and account to be charged and justification for the expenditure. Some examples of non-employees are campus visitors, visiting scientists, recruits, etc. Please refer to the Non-Employee Travel procedures for more information.

**IX. Travel Comparison**

Periodically out-of-state travel may involve driving versus flying. When electing to drive to a destination, reimbursement claimed will be the lesser of the cost of airfare or mileage. A justification for driving must be provided along with a reasonable comparison timeframe and approved in advance on the Travel Request form by an Associate Vice President, Vice President, or the President. The comparison should include estimates of airfare based upon the date the travel was known and not the day the Travel Request is completed. Utilize websites that can provide multiple airfares at the lowest rates. For example:

The need for travel was determined on October 1, 2017, but the paperwork is not completed until a week prior to the travel on February 5, 2018. The airfare estimate should be either dated within a week of October 1, 2017 or a future date of June 2018.

Total cost for the use of a private vehicle in lieu of airfare cannot exceed the lowest available rate of airfare, car rental or taxi and airport parking, unless there is a valid NMT business related reason for driving. Total cost includes mileage, plus additional per diem for the extra travel time incurred in lieu of flying. One round trip transportation mileage from Socorro to and from the Albuquerque airport is allowed.

## **X. Personal Days**

Periodically a travel is modified to include personal days. Identify the days that are personal and deduct from per diem, rental cars, hotel, etc. If easily identified by a daily rate, use the daily rates on the receipt to deduct from the receipt. An example of a receipt with daily rates is lodging which is broken down by day for all expenses. For a receipt that does not have a daily rate divide the total by the total number of days and multiply by allowed travel days to get the amount to be reimbursed.

### **A. Sabbaticals**

Travel expenses for a faculty member to and from a sabbatical site are not reimbursable by NMT. Funding for any university business-related travel while on an approved sabbatical is allowable under normal travel procedures.

If during the sabbatical the faculty member is recalled to campus on university business, the travel, needed lodging expenses while on campus and other expenses associated with the trip are allowable.

## **XI. International Travel**

For international travel outside of the United States, a request must be prepared and submitted to the President for prior approval at least two to three (2-3) weeks in advance. Any exceptions must have a written explanation attached to the Travel Request. The President will review these requests on a case-by-case basis.

The Travel Office uses [www.oanda.com](http://www.oanda.com) to verify currency conversion information when necessary. Attach printouts from whichever website that is used for currency conversions. Also attach backup showing the calculations used to convert to U.S. dollars based upon the date of the travel and not the return or date of reimbursement.

The employee is responsible for their passport fees. NMT will not reimburse for this expense. Plan ahead for other expenses; such as international calling with cell phones and data usage. Extra fees can add up quickly and may not be reimbursable.

Travelers are required to comply with all export control laws and regulations.

### **A. NMT Rates**

In addition to the actual cost of lodging (see Section - VI on Lodging), a meal cost reimbursement not to exceed allowed amount in Section - XVI Rates for each full 24-hour period will be made. Lodging rate is limited to In State rates if actual cost of lodging is not provided.

Sponsored projects that have been proposed using NMT rates are limited as above unless Department of State rates have been proposed for the international travel and approved by the funding agency. NMT policies and procedures apply.

### **B. Federal Travel**

If international travel is anticipated on an award that would otherwise use Federal Travel Rates, Department of State rates should be proposed for international travel and approved by the funding agency. NMT policies and procedures apply, not the FTR. The Department of State rates can be found at:

[http://aoprals.state.gov/web920/per\\_diem.asp](http://aoprals.state.gov/web920/per_diem.asp)

The traveler is responsible for obtaining written advanced funding agency approval for actual lodging expenses that exceed the maximum allowable Department of State rate. Written approval **must** be attached to the travel request, which is submitted to SPA. This office reviews funding agency approval for the specific trip. The requester must print the Department of State rates from the web-site and show the calculation for per diem. The print out and calculation **must** be attached to the travel request.

### **C. Non-exempt Personnel Temporarily Assigned to Foreign Duty Locations**

NMT finds that it will occasionally have non-exempt employees traveling to foreign locations in order to support either direct or externally sponsored NMT official business.

NMT will pay such employees a premium equivalent to twenty-five percent of their normal hourly pay for each hour worked during such periods. The premium pay will be included in any overtime calculation and will be subject to the following limitations and definitions.

- Non-exempt employees are those who are paid hourly and are eligible for either overtime premium or overtime compensated absence reimbursement.
- Foreign locations are those normally inhabited geographical areas within the boundaries of and under the direct control of recognized foreign governments and at least one-hundred (100) kilometers or sixty-two (62) miles from any United States border including the borders of United States Territories or protectorates. This definition would not recognize areas such as Guam, Puerto Rico or other United States protectorates or territories as foreign locations. Also excluded would areas such as Guantanamo Bay Naval Base in Cuba since it is under the direct control of the United States government. Nor would it recognize areas normally not inhabited or not normally directly controlled by foreign governments, such as Antarctica.
- Temporary Assignment means for a period of less than thirty days continuous absence from the employee's normal place of duty.
  - All intended premium pay for temporary (less than thirty days) foreign service must be requested in writing at least two (2) weeks in advance of the employee's departure date. Such requests will include the intended destination, the anticipated dates for the service, the source of funds for all related expenses including travel expenses, and the signature of the NMT official having budgetary authority over those funds. These requests will be sent to the Vice President or Associate Vice President who, after approving the request, will forward it to the Payroll Office. No other payroll related forms will be required; however all other employment policies will apply. All travel forms and supporting documentation will be required.
- For periods of thirty days or longer prior written approval from the President will be required for any wage adjustment. Requests for such approvals should be submitted in writing to the President's Office not less than one month prior to the planned date of departure. Supporting documentation should be provided to support the necessity and the availability of funds for the foreign mission Requests greater than thirty (30) days must have a Personnel Action Form attached. All travel forms and supporting documentation will be required.

Questions concerning, or requests for deviation from this policy should be submitted in writing to the President.

**XII. Student Travel (Foreign Students)**

The Internal Revenue Service (IRS) has specific requirements for reimbursing foreign students. These students must complete a "Foreign Student Travel - Tax Questionnaire", have it signed by the authorized supervisor, and attach it to their travel request. Student Travel Reimbursement Questionnaires are available on the Travel Office web site. <http://www.nmt.edu/finance/travel.php>

Draft

**XIII. Student Group Travel Procedures**

This procedure is for use when a large group of students travels with a member of the NMT faculty or staff. The faculty, staff or approved student will submit a Travel Request claiming all the expenses for the trip and with a complete list of all students including the Banner ID of those who will be traveling. The students will not be required to submit a Travel Request. Splitting expenses among more than one traveler will not be allowed. The group must comply with all other applicable regulations, policies and procedures. Examples of these are:

- Field camp and other class-related field trips
- Student club groups
- Other student groups traveling with NMT faculty or staff

Allowable reimbursement will be limited, as it would be for each individual traveler per the NMT Travel Procedures based on actual lodging and meal per diem. Reimbursement to the faculty, staff or approved student will require original, detailed receipts for all lodging and meal expenses to be attached to the Travel Reimbursement Voucher. This group procedure will address meals and lodging expenses. All other expenses will be reimbursed in accordance with the NMT Travel Procedure.

For the purpose of demonstrating this procedure, the following scenario will be used:

One faculty person traveling on a class field trip with nine (9) students: The group will be traveling to Albuquerque departing from Socorro at 2:00 p.m. on Monday and returning on Thursday at 2:00 p.m. This calculates to three (3) days of travel spending three (3) nights away. Actual lodging will be calculated assuming two (2) persons per room at a cost of \$200 per night per room.

The actual amount paid for lodging will be reimbursed when an original, itemized receipt is provided. In addition, the maximum per diem for meals will be the meal per diem rate allowable for the destination. An Example is:

Total maximum reimbursement for lodging and per diem cannot exceed the calculated amount of \$4,380, but will be limited to the total amount of detailed receipts submitted.

Actual lodging expense:  $(\$200 \times 5 \text{ rooms}) = \$1,000$   $(\$1,000 \times 3 \text{ nights}) = \$3,000$

Allowable meal per diem for Albuquerque:  $(\$46 \times 10) \times 3 = \$1,380$

Total allowable reimbursement =  $\$3,000 + \$1,380 = \$4,380$



## **XIV. Using Purchasing Card for Travel**

The purpose of this section is to establish guidelines necessary to comply with the provisions of 2.42.2 NMAC, the Procurement Code, NMSA 1978, §§ 13-1-28 to -199, the Federal Acquisition Regulations, and 2 CFR 200.

All Purchasing Cards are open for employee travel-related services, and can be used for allowable travel expenses, up to the single transaction limit of the cardholder. The Purchasing Office will provide a current list of all Purchasing Cards (last four digits only) to the Travel Office.

### **A. Allowable Purchasing Card Travel-Related Expenses**

- Airfare
- Hotel
- Ground transportation (shuttle, car rental, taxi, etc.)
- Parking
- Conference registration

### **B. Examples of Prohibited Purchasing Card Travel-Related Expenses**

Include, but are not limited to, the following:

- Gas
- Meals
- Hotel incidental expenses (room service, movies, etc.)
- Any personal purchase

With the exception of Section - E of this section and Student Organization Purchase Cards, travel payments are limited to NMIMT employees only. The NMIMT Purchasing Card may not be used for prohibited expenses. Prohibited expenses are the responsibility of the user and must be paid using another method of payment. For example, a hotel bill that includes room service and a movie, the traveler must pay for these prohibited expenses using cash or his / her personal credit card; these charges cannot be included in the hotel Purchasing Card payment.

### **C. Required Receipts**

Copies of itemized receipts for purchases made with the NMIMT Purchasing Card must be attached to the Travel Reimbursement form along with all other receipts needed for reimbursement. The credit card receipt alone will not be accepted. All attached receipts will be compared to the authorized Purchasing Cardholder list by the Travel Office to determine if a NMIMT Purchasing Card was used for the payment. Original itemized Purchasing Card receipts must be attached to the monthly Purchasing Card Statement and submitted to the Purchasing Office in compliance with the Purchasing Card Policy and Procedures document. If an unallowable expense is charged to the Purchase Card and listed on the travel receipt, the expense must be reimbursed prior to the travel reimbursement being processed. The amount must be reimbursed to the Cashiers located in Fidel to the proper account. Include a copy of the receipt with the travel reimbursement voucher and monthly Purchase Card Statement. The Cardholder is responsible to know all cancellation and change of travel policies and related penalties that may impact NMIMT funds before making charges to the NMIMT Purchasing Card. Use account code 710201 for all travel charged.

## D. Non-Employee Travel

The NMT Purchasing Card Policy may allow for non-employee travel expenses, but these are not allowed on the NMT Travel Procedures. See the NMT Non-Employee Travel Procedures for reimbursement and processing.

Misuse of the Purchasing Cards may constitute a violation of the NMIMT Purchasing Card Policy, and could result in revocation of the Purchasing Card.

## E. Student Travel

Any NMIMT official Student Club and Organization can contact the Budget Office for assistance in using an NMIMT Purchasing Card. The Budget Office card may be used for student related expenses and allowable travel expenses.

The Purchasing Office allows departments to utilize Purchasing Cards for student airfare for domestic travel and hotel. As stated in Section C above, the Cardholder is responsible to know all cancellation and change of travel procedures and related penalties that may impact NMIMT funds before making charges to the NMIMT Purchasing Card. At no time may a Cardholder give their card or card information to a student for use in booking travel and hotel reservations, or when the student is traveling. All student travel and hotel reservations shall be booked by the NMIMT Cardholder.

**Note: All other NMT Purchasing Card purchasing policies and procedures apply to the use of the Purchasing Card for travel.**

**XV. References**

U.S. General Services Administration [www.GSA.gov](http://www.GSA.gov)

NMT Purchasing Manual

<https://www.nmt.edu/finance/purchasing/Purchasing%20Manual%20Updated%203-19-18.pdf>

NMT P Card Policy

[https://www.nmt.edu/finance/purchasing/NMT\\_Purchasing\\_Card\\_Policy\\_Manual.pdf](https://www.nmt.edu/finance/purchasing/NMT_Purchasing_Card_Policy_Manual.pdf)

Travel Information Sheet

[https://www.nmt.edu/finance/docs/travel/Travel\\_Rates\\_and\\_Other\\_Information\\_Sheet\\_updated\\_9-13-16.pdf](https://www.nmt.edu/finance/docs/travel/Travel_Rates_and_Other_Information_Sheet_updated_9-13-16.pdf)

Mileage Calculations NMT Rate [https://www.nmt.edu/finance/docs/Mileage\\_072518.pdf](https://www.nmt.edu/finance/docs/Mileage_072518.pdf)

Travel Policy [pending](#)

Travel Request and Reimbursement Form

[https://www.nmt.edu/finance/docs/travel/NMT\\_Travel\\_Request-Reimbursement-v2017-07-25\\_1.pdf](https://www.nmt.edu/finance/docs/travel/NMT_Travel_Request-Reimbursement-v2017-07-25_1.pdf)

Travel Request Form Instructions <http://www.nmt.edu/finance/travel.php>

Travel Reimbursement Form Instructions <http://www.nmt.edu/finance/travel.php>

Non-Employee Travel Expense Procedures <http://www.nmt.edu/finance/travel.php>

Travel Estimation Worksheet <http://www.nmt.edu/finance/travel.php>

No Receipt Expense Statement <http://www.nmt.edu/finance/travel.php>

Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards

<https://www.govinfo.gov/app/details/CFR-2014-title2-vol1/CFR-2014-title2-vol1-part200/context>

## XVI. Rates

Rates defined as per NMT Regents approved Travel Reimbursement and Per Diem Policy dated TBD.

### A. NMT Per Diem Rates

The reimbursement rates will be reviewed every two years.

Description	Rate
In-state and international per diem and lodging	\$135.00
Out-of-state per diem and lodging	\$215.00
Per diem only if actual lodging is requested	\$46.00
• Breakfast	\$9.00
• Lunch	\$12.00
• Dinner	\$25.00
Prorated partial day, AFTER 24 hours	
• Less than 6 hours	\$9.00
• 6.01 hours up to 12 hours	\$21.00
• 12.01 hours up to 24 hours	\$46.00
Reduce if provided	
• Breakfast	\$9.00
• Lunch	\$12.00
• Dinner	\$25.00
• In-State Lodging for each 24 hour period	\$89.00
• Out-of-state Lodging for each 24 hour period	\$169.00

### B. Federal Per Diem Rates

Travel which is reimbursed from Federal funds will be reimbursed at the Federal rates, unless NMT rates were proposed and approved by the funding agency. All NMT policies and procedures regarding travel reimbursement will apply to travel on all funds including Federal sources.

### C. Mileage Rates

Regardless of funding source the mileage reimbursement rates will be in accordance with the prevailing Internal Revenue Service standard rates miles. <https://www.irs.gov/credits-deductions/individuals/standard-mileage-rates-at-a-glance>