

Business Office

Travel Policy

Effective Date: November 24, 2003

Updated: February 2007

This travel policy is established by the New Mexico Tech Business Office. If you have any questions, please contact the Business Office at 505-835-5315

General

This policy is applicable to any New Mexico Institute of Mining and Technology (“Tech”) employee or student traveling on official Tech business with a destination of more than 50 miles away from either their designated post of duty or their home, whichever is nearest to their destination.

Please note the web-sites referenced in this policy may change. When a change is discovered it will be incorporated into this policy and a notice will be sent to the NM Tech community.

Employees or students will only be reimbursed for their own personal allowable expenses. If one traveler pays the expenses of a second traveler then the first traveler must collect reimbursement from the second traveler. Each traveler must have submitted and had approved a travel request and reimbursement voucher before they can be reimbursed for their own expenses.

The IRS rules for Employer Travel Reimbursements state that 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. Since Tech does not have the resources to track and report such amounts, Tech will not reimburse amounts in excess of maximum Federal per diem rates.

Any travel supported solely by federal funds or a federal subaward that are specifically identified as such in the Tech system may use Federal rates. Please note when federal rates are being used; Grants & Contracts must verify the funding source. The federal M&IE rate must be printed from the website and attached to the travel request to facilitate review by the travel office. If the traveler wishes to receive reimbursement of actual lodging costs, the travel request must be approved by the Vice President for Administration and Finance or the President. If this is the case, in no event may the traveler approve his or her own travel.

Any travel supported in any way by state funds will use the state rates.

Requests for expense reimbursements for professional activities while traveling outside of Socorro must have a list of the Tech participants as well as a copy of the travel reimbursement voucher for each Tech participant attached to it. The requests will be given to the Travel Office for verification that Tech participant(s) are not reimbursed twice.

Exceptions to this travel policy will be treated on a case-by-case basis and must be approved by the Director of Finance or the Vice President for Administration and Finance.

The Travel Request form must be completed regardless of whether or not reimbursement from Tech is requested or whether another entity is paying for costs. This completed form serves as evidence that the employee or student is on approved official Tech business and is thereby covered under Tech’s liability insurance. The following list highlights requirements for the travel form:

- Every Tech employee or student MUST submit a TRAVEL REQUEST even if he or she is using an official vehicle.

- The Internal Revenue Service (IRS) has specific requirements for reimbursing foreign students. These students must complete a “Student Travel Reimbursement Questionnaire”, have it signed by the authorized supervisor, and attach it to their travel request. Blank questionnaires may be obtained from the Travel Office.
- A travel request is an estimate of reasonable maximum expenses to be reimbursed with Tech funds. IT MUST BE SUBMITTED TO THE TRAVEL OFFICE PRIOR TO DEPARTURE. This allows time for verification and reduces the processing time for payment when the reimbursement voucher is submitted after the trip.
- A TRAVEL REIMBURSEMENT VOUCHER, based on the approved travel request, should be submitted within ten (10) working days after completion of the authorized travel and it cannot exceed the amount approved on the request. Allow ten (10) working days for reimbursement vouchers to be processed after they are received in the Travel Office.
- If an employee or student has more than one outstanding travel request on file for completed trips, no further travel will be approved nor new travel expenses be processed unless prior approval is obtained from the Director of Finance or the Vice President for Administration and Finance. If money is owed to Tech by the traveler, that trip will be considered outstanding and no payments for any further travel for that individual will be processed until the matter is resolved.
- Departments may establish reasonable reimbursement policies that define lower limits than those defined in this policy. However, the policy must be consistent and uniformly applied and approved by the Vice President for Administration and Finance.
- Unless otherwise stated in the grant or contract, staff and students must be working on the grant or contract, and either being paid from it or officially cost sharing to it, before any travel expenses may be charged to that grant or contract.
- The designated place of work for all Tech employees or students who travel will be the city in which the current regular job site is located. For employees who commute, travel will be computed from the designated place of work or the employee’s actual point of departure; whichever is closer to the traveler’s destination.

Travel Request and Reimbursement

All employees and students are required to complete and submit a travel request form BEFORE a trip is taken. Regularly scheduled pick-up or delivery trips are exempt from this requirement.

For international travel outside the 50 United States, a request must be prepared and submitted to the President for prior approval at least three (3) weeks in advance. Any exceptions must have a written explanation attached to the travel request. The Director of Finance, the Vice President for Administration & Finance, or the President will review these requests on a case-by-case basis.

Prior to sending the Request to the Travel Office, Brown Hall, Room 12, the individual (Principal Investigator or account administrator) with budgetary authority for the funds will review and ensure that proper documentation is attached (where applicable) and will check for the following items:

- Justification for the trip or travel.
- Departure and destination locations (for mileage reimbursement).
- Reasonable estimated expenses.
- Compliance of Tech’s travel policy guidelines.

- Availability of funds in the budget.

A travel request MUST include the following:

1. Justification for the trip to be taken. Examples are invitations, brochures or copies of the registration. If no documentation is available, specify how information about the trip was obtained (letter, telephone, contract, etc.). The traveler will provide a reason for the trip and demonstrate that the travel is necessary and beneficial to Tech.
2. Full account number and object code (630 through 63X) for all expenses, including registration. In the event that a special object code has been assigned for registration fees, this object code should be indicated with the amount of these expenses.
3. Actual cost for lodging only. Must have prior approval must be granted by the Vice President for Administration and Finance or the President.

Per Diem

When traveling on state funds:

1. A partial day trip will be paid either as per diem or meals (with receipts and not to exceed the stated limits), if within the hours allowed, not both.

Per diem - Prorated partial day, LESS than 24 hours:

Less than 6 hours:	NONE
6 hours up to 12 hours:	\$ 6.00
12 hours up to 18 hours:	\$ 14.00
18 hours up to 24 hours:	\$ 30.00

Meals –

Breakfast \$ 6.00 Lunch \$ 8.00 Dinner \$ 16.00

2. Per diem will be paid on trips of more than 24 hours.

The following schedule is used for per diem determinations:

In-state, except selected cities: \$ 85.00

Selected New Mexico cities:

Albuquerque, Los Alamos, Taos: \$105.00

Santa Fe: \$135.00

Out-of-state, except selected cities: \$ 85.00

Selected areas outside the continental United States or the metropolitan areas of:

Houston: \$115.00

Las Vegas, NV, Dallas: \$120.00

St. Louis, Miami, Los Angeles, San Diego, Denver: \$140.00

Minneapolis/St. Paul, Philadelphia: \$160.00

Baltimore, Seattle: \$180.00

Washington, D.C.; Chicago, San Francisco, Boston, New York City: \$200.00

Prorated partial day, AFTER 24 hours:

Less than 6 hours: \$ 6.00

6 hours up to 12 hours: \$ 14.00

12 hours up to 24 hours: \$ 30.00

3. Actual cost for lodging only. Prior approval must be granted by the Vice President for Administration and Finance or the President. Lodging receipts, less the cost of meals, and other room charges must be attached to the Travel Reimbursement Voucher.
4. In addition to the actual cost of lodging, a meal reimbursement not to exceed \$30.00 for each full 24-hour period is allowed without receipts.

Breakfast \$6.00 Lunch \$8.00 Dinner \$16.00

5. In Santa Fe, Anchorage, Fairbanks, and Hawaii, meals will be reimbursed at the following special rates:

Breakfast \$9.00 Lunch \$11.00 Dinner \$25.00

When traveling on federal funds:

Per diem for travel of LESS than 10 hours will not be paid on Federal Contracts.

Grants & Contracts must verify the funding source and that federal M&IE rates may be used. E-mail from G & C verifying this information is sufficient verification. This verification must be attached to the Travel Request when it is submitted. When traveling on federal funds, reimbursement cannot exceed federal joint travel regulations. Federal rates can be found at the following website:

<http://www.GSA.gov>

The federal M&IE rates must be printed from the web-site and attached to the travel request.

International Trips

1. Prior approval must be obtained from the President. Submit your request at least three (3) weeks prior to your planned date of departure.
2. Receipts for lodging must be submitted.

When traveling on State funds:

Actual cost for lodging will be paid when receipts are attached to the Travel Reimbursement Voucher.

In addition to the actual cost of lodging, a meal reimbursement not to exceed \$45.00 for each full 24-hour period is allowed without receipts. Meals will be reimbursed as follows:

Breakfast \$ 9.00 Lunch \$ 11.00 Dinner \$ 25.00

When traveling on Federal funds:

When traveling on federal funds, reimbursement cannot exceed federal joint travel regulations.

Lodging and meals will be reimbursed at the international federal M&IE rates. These rates can be found at:

www.state.gov/m/a/als/prdm.

The federal M&IE rates must be printed from the web-site and attached to the travel request.

3. The Travel Office uses www.oanda.com to verify currency conversion information when necessary. Attach printouts from whichever web-site that is used for currency conversions. Also attach backup showing the calculations used to convert to U.S. Dollars.

Prepayments

Payments made personally by the traveler prior to a trip (i.e., airline fare, registration) will be reimbursed at 100%. Requests are to be submitted on a direct payment form, signed by the appropriate individuals. A copy of the relative travel request and proof of payment must be attached to the direct payment form. These payments will be processed when the request is received.

Requests for a travel advance are to be submitted on a direct payment form, signed by the appropriate individuals. Travelers may obtain a 90% advance of the submitted expenses, less any prepayments, on trips requiring a stay of 24 hours or more. Advances on travel lasting less than 24 hours will not be given. Advances will be released not more than 5 working days prior to the trip. Send direct payment forms to the Travel Office at least ten (10) working days before the trip for processing.

Transportation

The mileage rate for the use of a private vehicle is \$.32 cents per mile. (An in-state mileage schedule follows.) For mileage over and above the schedule, the odometer reading must be submitted on the Travel Reimbursement Voucher.

Distance Calculations for Mileage

Socorro to:	R/T	.32	Total
Alamogordo	268	.32	\$ 85.76
Albuquerque	154	.32	49.28
Artesia	410	.32	131.20
Aztec	508	.32	162.56
Bernalillo	184	.32	58.88
Carlsbad	482	.32	154.24
Carrizozo	152	.32	48.64
Chama	484	.32	154.88

Cimarron	520	.32	166.40
Clayton	678	.32	216.96
Cloudcroft	294	.32	94.08
Clovis	496	.32	158.72
Deming	312	.32	99.84
El Paso, Tx	378	.32	120.96
Espanola	322	.32	103.04
Estancia	176	.32	56.32
Farmington	518	.32	165.76
Ft. Sumner	376	.32	120.32
Gallup	386	.32	123.52
Grants	266	.32	85.12
Hagerman	378	.32	120.96
Hatch	218	.32	69.76
Hobbs	562	.32	179.84
Hurley	316	.32	101.12
Las Cruces	292	.32	93.44
Las Vegas	400	.32	128.00
Lordsburg	410	.32	131.20
Los Alamos	340	.32	108.80
Los Lunas	106	.32	33.92
Lovington	518	.32	165.76
Mora	460	.32	147.20
Mountainair	130	.32	41.60
Playas	454	.32	145.28
Portales	512	.32	163.84
Raton	602	.32	192.64
Red River	484	.32	154.88
Reserve	258	.32	82.56
Roswell	330	.32	105.60
Roy	552	.32	176.64
Ruidoso	236	.32	75.52
Santa Fe	272	.32	87.04
Santa Rosa	338	.32	108.16
Silver City	322	.32	103.04
Springer	534	.32	170.88
Taos	412	.32	131.84
Tierra Amarilla	452	.32	144.64
T or C	144	.32	46.08
Tucumcari	456	.32	145.92
Tularosa	242	.32	77.44
Vaughn	264	.32	84.48
Carlsbad to Alb	550	.32	176.00
Roswell to Alb	398	.32	127.36

For out-of-state mileage, the standard mileage as reported in the *Rand McNally U.S. Road Atlas* (or equivalent publication) may be used. Odometer readings will be accepted provided the total mileage is reasonable when checked against the above publication. If claimed mileage appears unreasonably high, a written justification must be attached. The Director of Finance or the Controller will decide when to request such justification.

Airline fares do vary, so when making plans call the Regents- approved travel agency or airline as early as possible to obtain the lowest fare. Companion flights will be allowed only for Tech

employees or students. The travel request must be turned into the Travel Office before tickets can be picked up.

The purchase of an “electronic ticket” is an agreement between the traveler and the travel agency. If the traveler does not turn in an approved travel request, they (*NOT New Mexico Tech*) are responsible for payment.

If an airline trip is cancelled or the ticket is changed, the traveler will state the reason for the cancellation or change in writing. Tech 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 s/he should be granted an exception to this provision; then s/he must submit a written request to the Director of Finance. The individual responsible for the account from which payment would be made must approve the request before it is submitted to the Director of Finance.

A memo, dated and signed by the department head, must be submitted for all airline tickets or other charges to Tech for visitors (e.g., recruits, visiting scientists, etc.). The memo must contain the traveler’s name, amount of charges, complete account number and justification for the expenditure.

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.

Airport shuttle service is available in Socorro and billed to Tech on a monthly basis. A memo, dated and signed by the department head must be sent to the Travel Office, listing the visitor’s name (i.e., recruits, visiting scientists, etc.), the amount of the charge, a complete account number and justification for the expenditure.

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 Tech-business-related reason for driving. Total cost includes mileage plus additional per diem for the extra travel time incurred in lieu of flying. A “per-trip” transportation fare of \$49.28 from Socorro to and from the Albuquerque airport is allowed.

OTHER transportation includes bus, taxi, airport shuttle, railroad, car rental and baggage in excess of allowable weight. Receipts must be submitted with the Travel Reimbursement Voucher. Pooling of a vehicle, auto or aircraft is encouraged.

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.

Prepayment of Registration

Prepayments must be submitted on direct payment forms with a completed registration form and sent to the Travel Office. Allow ten (10) working days for processing.

- If prepaid registration fees include meals and/or lodging, the per diem will be reduced by the respective amounts listed under the per diem section.

Miscellaneous Expense

Other necessary business expenses, such as parking, tips (exclusive of meal gratuities), business calls or business telephone access charges only, copying charges, and other business expenses that can be documented as costs directly incurred as a result of the travel, will be reimbursed when receipts AND an itemized list OR other written certification is provided.

Occasionally a receipt can be misplaced or can not be obtained from a service provider. If this happens, the traveler must certify in writing what and how much the expense was and why there is no receipt.

Travel Reimbursement

The approving officer must review the following:

1. Ensure that the following are attached and listed on the Travel Reimbursement Voucher:
 - Airline ticket stub (or travel itinerary in the case of an e-ticket)
 - Lodging receipt, (where actual reimbursement is being requested)
 - Car rental receipt
 - Miscellaneous receipts or certification.
2. Deduct prepayments for meals, advances, airline tickets, hotel payment and registration. (If registration includes meals or lodging, deduct according to Section V.)
3. If another department is paying for part of the trip, send the forms to that department for a signature and verification of the account number.

If funds are to be returned to Tech, then 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.

Petty Cash Travel Reimbursements

A Travel Reimbursement Voucher requiring 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.

Corrections on Travel Requests or Reimbursement Vouchers

Travel forms must either be typed or printed in ink. 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. Any form with correction fluid, correction tapes or pencil will be returned.

Penalty

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.

Note: Employees on travel who participate in a function (e.g. a Tech-hosted meal) for which reimbursement is requested must reduce their per diem amount in order to avoid duplicate payment.