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## Travel Reimbursement Policy & Instructions January 2018

This document describes basic NISS policies and procedures for travel reimbursement. Travelers should be aware that additional restrictions (for example, use of U.S. flag carriers) may apply to travel funded by federal grants and contracts.

1. **Air Travel.** Travelers are expected to exert reasonable effort to secure cost-effective fares, including use of advance purchases. Only economy class air fares will be reimbursed.
2. **Advance Approval.** [NISS EMPLOYEES ONLY] A NISS Travel Authorization Form must be submitted in advance of any travel, and must be approved by either the project PI or the Director. Failure to submit this form may delay or even prevent reimbursement.
3. **Per Diem.** The maximum per diem rate is \$57, to cover meals and incidental expenses, broken down as follows:
  - Breakfast \$12.00
  - Lunch \$15.00
  - Dinner \$30.00

Claimed per diem amounts must be adjusted for meals provided at NISS events or paid for by others (e.g., meals included in conference registration fees).

4. **Use of Personal Automobiles.** Use of personal automobiles is reimbursable at the rate of 54.5 cents per mile for authorized travel. "Authorized travel" does not include travel within an employee's home area, or to his or her home airport.
5. **Exclusions.** Items for which reimbursement is not permitted include:
  - Personal expenses incurred while on travel. Examples are laundry and telephone calls for purposes other than NISS business.
  - ATM fees, regardless of the location. However, documented foreign exchange fees on credit cards will be reimbursed.
  - Entertainment expenses (e.g., in-room movies at hotels).
  - Alcoholic beverages.
  - Use of personal cars within an employee's home area, even to drive to the home airport for out-of-town travel.
  - Use of taxis or limousine services for home-to-airport transportation, unless the cost can be documented as being less than the least expensive on-site parking at the airport.

- Avoidable incremental expenses, such as late fees for conference registrations, and even failure to make use of early registration deadlines.
6. **Deviations.** NISS encourages employees to reduce travel expenses by any sensible means. An example is use of alternative airports (e.g., GSO instead of RDU). However, when this is done, the savings must be documented. Ordinarily, the simplest means of documentation is to print a web page showing the cost of the “non-chosen” alternative. In cases where NISS has reserved a block of hotel rooms for an event, advance written authorization is required for stays at any other hotel.
  7. **Loyalty Programs.** NISS asserts no ownership or control of “points” earned by its employees under airline, hotel or credit card loyalty programs. However, membership in such programs should never distort choices of airlines or hotels.
  8. **Exchange Rates.** Exchange rates for all transactions over \$50 must be documented. Ordinarily, this can be done with a copy of the credit card statement on which the charge appears. Exchange rates for undocumented transactions will be calculated as the lowest (most favorable to NISS) exchange rate appearing on the reimbursement request.
  9. **Expense Forms and Reimbursement.** Requests for reimbursement must be made on NISS forms, which must be signed. Original receipts for transportation (for items in excess of \$35) and lodging must be included with the expense report. NISS reserves the right to adjust expense reports that do not comply with the travel reimbursement policy, and to request documentation of any expenses it deems to require documentation. Reimbursement takes place only after travel (or conference attendance) has been completed.

# NISS Expense Authorization Form

## Request for Travel Approval

Name \_\_\_\_\_

Where \_\_\_\_\_

Dates \_\_\_\_\_

Purpose \_\_\_\_\_

Estimate of Expenses \_\_\_\_\_

Project/Account \_\_\_\_\_

Submitted by: \_\_\_\_\_ Date \_\_\_\_\_

Approved by: \_\_\_\_\_ Date \_\_\_\_\_

## Request to Purchase (items over \$100)

Item \_\_\_\_\_

Amount \_\_\_\_\_

Project/Account \_\_\_\_\_

Submitted by: \_\_\_\_\_ Date \_\_\_\_\_

Approved by: \_\_\_\_\_ Date \_\_\_\_\_