LSU Travel Program

Office of Accounting Services
Accounts Payable and Travel
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Agenda

- University policies
  - PM-13, University Travel Regulations
  - FASOP AS-18, High Risk Travel to Restricted Regions and Foreign Adversaries
- Travel Payment Methods
- LSU Travel Program
- Helpful Reports
- Resources

LSU Travel Program – Travel Payment Methods – Employee

- **LaCarte Card (preferred)**
  - Employees are encouraged to request a LaCarte card if they plan to travel on University business

- **Traveler's Personal funds**

- **Cash (Travel) Advance (requested on employee Spend Authorization)**
  - Employed graduate student on business travel for the University
  - Employees who accompany and/or responsible for students on group travel
  - Employees traveling to remote destinations within foreign countries

LSU Travel Program – Travel Payment Methods - Non-Worker

- **Non-Worker (External Committee Member – ECM)** is defined as a University guest/visitor, interview candidate, contractor, fellow, or non-employed graduate/undergraduate student

- **Payment Options for Travel Expenses**
  - Employees with a LaCarte card and Travel Arranger spending profile
  - Direct Billing Payment Process with The Cook Hotel and Conference Center (Form AS540)
  - Personal Funds

LSU Travel Program – Travel Payment Methods - LaCarte

- **Monthly reminder sent to all cardholders with transactions over 30 days old**
  - The 30-day reconciliation requirement refers to non-travel expenses only
  - Travel expenses should be submitted on an expense report once the travel is completed

- **Lacarte card declines – contact a member of the LaCarte staff**
  - Theresa Oubre talber3@lsu.edu
  - Christian O'Brien cobrien2@lsu.edu
  - Peyton Delatte pdelatte@lsu.edu
  - DeAnna Landry deannal@lsu.edu

State of Louisiana Contracted Travel Vendors

LSU Travel Program - Airfare

- **Christopherson Business Travel**
  - Mandatory State-contracted travel agency to book airfare for LSU employees, LSU students, and guests/interview candidates (if paid with LaCarte).
    - Guests and interview candidates may use personal funds (CBT is not required)
  - CBT profiles built through HR integration for faculty, staff and employed graduate students

- **Contact information:**
  - Email: Statelauniv@CBTravel.com
  - Toll-free phone: 1-800-961-0720 (Monday-Friday 7am-7pm CT)

LSU Travel Program

- **Concur Online Booking Tool– Recommended!**
  - On-line support email: OnlineSupport@CBTravel.com
  - Toll-free Phone: 1-888-535-0179 (Monday-Friday 7am-7pm CT)

- **Login to Concur Online Booking Tool:**
  - Access through myLSU online Single Sign-On
  - Click “Travel Resources”
  - Link to CBT Online Booking System will be provided

- **Agent-assisted travel arrangements**
  - Complex international travel
  - Group travel (10 or more people traveling together)

LSU Travel Program – Unused Tickets

- **Monitor unused tickets**
  - Ensure unused tickets are used prior to expiration
  - Ensure travelers are not applying unused tickets toward personal travel

- **Unused Ticket Notifications**
  - Automated reminders are sent at 120, 90, 60, 30, and 14 days
    - Department Heads and Cost Center Managers are copied on the e-mails to the travelers
  - Department Heads receive monthly Unused Ticket Reports
  - Unused Tickets Report is published on the AP & Travel website by the 15th of each month

LSU Travel Program – Rental Vehicles

- **Contracted Vendors (mandatory use):**
  - Enterprise/National - use AP & Travel website link (no discount code needed)
  - Hertz - use reservation link + corporate discount code (contact AP & Travel)

- **Guidelines**
  - Use contracted vendors (CDW/$1M liability included)
  - Rent compact or standard unless:
    - More than 2 travelers <u>or</u>
    - Hauling equipment/supplies
    - Requires justification on expense report
  - Documentation required if vendor has no vehicles

- **Report all accidents to Office of Risk Management (ORM) and rental company immediately.**

LSU Travel Program – Insurance on Rental Vehicles

- **Within 50 U.S. States: Covered by ORM if contracted vendor used; rental company insurance not reimbursable**

- **Outside U.S.: ORM does not cover → reimbursable insurance:**
  - CDW / Loss-Damage Waiver
  - Tow Protection
  - Supplemental Liability
  - Theft / Fire (if required)
  - Not reimbursable: Personal Accident, Emergency Sickness

- **Non-Employees**
  - Not covered by ORM unless using contracted vendor → if not, insurance is reimbursable

LSU Travel Program - Charter Bus

- **Christopherson has partnered with Short's Travel Management**
  - Charter bus services - STM Ground, Inc./STM Driven
  - No requisition is required

- **Contact Information:**
  - STM Ground Inc./STM Driven
  - 1203 W. Ridgeway Avenue Waterloo, IA 50701
  - E-mail: Nick Gyllin: ngyllin@stmdriven.com
  - Direct: 319-433-0851 Cell: 773-766-8123 Fax: 319-234-2490

LSU Travel Program – The Cook Hotel and Conference Center - Payments

- **Direct Bill Process - AS540 form**
  - Approved Spend Authorization ECM
  - The Cook Hotel confirmation
  - The Cook Hotel contract may be required for large group booking

- **Conference room rental required documentation**
  - The Cook Hotel contract is required
  - Email AS540 form and required documentation to Jennifer Driggers (jdrigg@lsu.edu)

- **LaCarte Card**
  - Allowed for payment of lodging only if no contract is required
  - Credit Card Authorization form is required and is available on the AP & Travel Website

- **NOTE: If room block only and LSU is not paying for the lodging the AS540 form is not required. The contract is emailed to purchase@lsu.edu. Let Procurement know that the contract is for a room block only and LSU is not responsible for payment**

LSU Travel Program – Workday - Expense Data Entry Specialist role

- **Expense Data Entry Specialist Role (EDES):**
  - The EDES role can be assigned to a departmental person with the responsibility to create expense reports and/or spend authorizations on behalf of another worker or non-worker (i.e., external committee member (ECM).
  - The EDES role is preferable to Delegation because employees do not have to delegate a task (i.e., expense report or spend authorization).
  - The EDES role allows for access to employee's transactions.
  - The role can be requested for the designated person by submission of a Security Access Request in MyLSU.
  - The security request will route to Patrice Gremillion for review/approval prior to assignment.

LSU Travel Program – Workday - Expense Data Entry Specialist role

- **Task Names**
  - Create Expense Report for Worker
  - Create Expense Report for Non-Worker
  - Create Spend Authorization for Worker
  - Create Spend Authorization for Non-Worker

- **Important Dates when creating the ECM (Non-Worker) Profile:**
  - The Effective date is the date the ECM profile needs to be active. Also, must a date prior to the actual travel dates
  - The End date should left blank, it is the date the profile will become inactive, and the Spend Authorization ECM/Expense report cannot be created or paid
  - The travel dates are not entered into the ECM profile

Spend Authorization

(Authorization to Travel)

LSU Travel Program – Authorization to Travel

- **Spend Authorization (Workday)**
  - Authorization to Travel - one Spend Authorization per traveler per trip
  - Blanket Spend Authorizations for routine instate travel only - cannot cross fiscal year (FY = 7/1 – 6/30)
  - Ensure appropriate business purpose is used

- **Job Aids are located on the LSU Workday website under Finance trainings (https://www.lsu.edu/workday/finance_training.php)**

- **AS516 form**
  - Non-worker or group travel where no reimbursement is due the traveler. List of travelers must be attached to the AS516

LSU Travel Program – Spend Authorization

Spend Authorizations must be fully approved prior to making any travel expense payments.

- **Required Information:**
  - Start Date/End Date – first day to last day of travel
  - Description field – departure destination to business destination
  - Justification field – detailed purpose of travel

- **Spend Authorization Questionnaire:**
  - Personal travel dates and destination
  - High Risk Travel to a Restricted Region
  - University travel greater than 30 consecutive days at one location

***Personal travel destinations should not be included in LSU business airfare**

Expense Reports

LSU Travel Program - Expense Report - Employee

- Expense report should be created after trip is completed or cancelled
  - Submit by the 15th of the following month
- Link approved Spend Authorization
  - If unable to link, attach PDF copy – do not create a new SA
- Import LaCarte transactions and include all out-of-pocket expenses
- Attach all receipts/supporting documents as one PDF on Attachments tab
  - Approval will be delayed if documentation missing
- Employee expenses paid out-of-pocket are reimbursed via direct deposit

LSU Travel Program - Expense Report - Non-Worker

- Create External Committee Member (ECM) profile in Workday
- Create Spend Authorization for Non-Worker
- Create Expense Report for Non-Worker
- Submit one expense report with all expenses
  - Attach all receipts/supporting documents as one PDF on Attachments tab
  - Approval will be delayed if documentation missing
- Domestic guests reimbursed via check
- International guests reimbursed via wire transfer

LSU Travel Program – Expense Report

- AS350 Travel Supplemental Information form:
  - Highly recommended to clarify expenses
  - Section A: If supplier invoice, reference ER # of other expenses paid
  - Section B: Mileage Log
  - Section C: M&IE

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TRAVEL SUPPLEMENTAL INFORMATION AS350

Traveler		Contact	
Dept		Phone	
LSU ID		E-mail	
Destination			

Section A – Travel Expenses Paid by LaCarte or CBA (not included on this Expense Report)

Date	Expense	Expense Report #	Description	Amount
	Registration			
	Airfare			
	Luggage			
	Vehicle Rental/Gas			
	Hotel			
	Airport Parking			
	Other/Miscellaneous			
			Total	

Section B – Mileage Log (If website mileage calculator not used)

Date	Odometer Beginning	Odometer Ending	Total Miles	Rate	Amount
				Total	

Section C – Meals and Incidental Expenses (M&IE) Log

Date	Time from Domicile	Time to Domicile	Breakfast	Lunch	Dinner	Incidentals	Destination	Amount
							Total	

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LSU Travel Program – Required Documentation

- Airfare
  - PDF copy of final itinerary (ticket # + last 4 digits of card)
  - Reference original ER if reused ticket
  - Justification for airfare changes/cancellations
  - No personal destinations on itinerary
- Conference Travel
  - Agenda required (all conferences, incl. virtual/local)
  - Per diem (M&IE) may not be claimed for meals provided by a third party
- Vehicle Rental
  - Itemized/final receipt
  - Justification if larger than mid-size
- Fuel
  - Itemized receipt OR time-stamped pump photo (with justification)
  - Not allowed for personal – mileage may be claimed
  - Not allowed for LSUAM vehicles (FuelTrac required)

LSU Travel Program – Required Documentation

- **Mileage**
  - Odometer log or mileage calculator (none needed if Google Mileage item used)
  - Out-of-state: lowest airfare quote required
  - Enter actual number of miles

- **Taxi / Shuttle / Rideshare**
  - Itemized receipt required (tip ≤ 20%)
  - Uber/Lyft: Standard only; no wait times, priority fees, or luxury services
  - XL allowed only with 2+ passengers (attach Spend Authorization)

- **Motorcycles, bicycles, mopeds, scooters → require Dept. Head approval**

- **Airport Parking**
  - BTR: $4.50/day (coupon from AP & Travel; LSU ID required)
  - MSY: $20/day; $12/day economy garage; USPark $16/day + taxes/fees

LSU Travel Program – Required Documentation

- **Public Ground Transportation**
  - Up to $10/day w/o receipt; receipts required if over $10
- **Baggage**
  - Itemized receipt required; request duplicate if lost
  - Tips for baggage handling – already included in GSA/State Dept. per diem rates (since 10/1/22)
- **Foreign Travel (non-LaCarte)**
  - Attach currency conversion (Oanda.com or bank statement) using transaction date; expense must be in USD with conversion documentation (Workday conversion not allowed)

LSU Travel Program – Required Documentation

- **Lodging**
  - Itemized hotel folio w/ zero balance required
  - Conference rate → need organizer documentation
  - Prepayment not allowed (only 1st night to hold; rest paid at checkout)
  - If trip canceled → only 1st night reimbursable (with justification)

- **Lod Cook: no taxes if LaCarte/AS540; includes breakfast (per diem breakfast not reimbursable)**

- **Meals & Incidentals (M&IE)**
  - Use AS350 form (recommended)
  - Receipts not required (except student group travel)
  - No per diem if meals provided by registration or host

LSU Travel Program – Personal Vehicle Usage

- Mileage reimbursement
  - Rate: 70¢/mile (effective 1/1/25) – mileage is reimbursed at the rate in effect at time of travel

- Out-of-State Mileage:
  - Traveler's convenience - limited to lowest logical airfare (14-day advance quote required, attach to ER)
  - University benefit - limited to lowest airfare + rental car cost at destination (quotes required, attach to ER)

LSU Travel Program – Personal Vehicle - Example

- Baton Rouge → Houston → Baton Rouge (268 miles each way, 536 total).

- Mileage reimbursement: 536 × $0.70 = $375.20.

- Lowest logical airfare (14 days in advance): $288.83.

- Reimbursement is capped at $288.83 (driving was a personal choice)

- What to attach to Expense Report:
  - Mileage calculator or odometer log
  - Airfare quote

LSU Travel Program – Personal Vehicle – Mileage Examples

- Workday example for mileage limited to airfare quote for employee:

Expense Date *	01/22/2025
Expense Item *	Mileage (Manual)
Quantity *	536
Per Unit Amount *	0.537929
Total Amount *	288.33
Currency *	USD
Memo	Mileage limited to CBT quote

- Workday example for mileage limited to airfare quote for non-employee:

Expense Date *	01/22/2025
Expense Item *	Guest Travel
Total Amount *	288.33
Currency *	USD
Memo	Mileage limited to CBT quote

LSU Travel Program – Travel by Train

- Retain train tickets/receipts and supporting documentation

- Lowest logical airfare quote must be provided for comparison

- Only Economy class ticket with no sleeping cabin is allowed

- Only one travel day before and after LSU business event is allowed
  - Additional travel days are considered personal

LSU Travel Program – Travel Rates Overview

Where to find rates:

- Domestic (48 states + DC): https://www.gsa.gov/travel/plan-book/per-diem-rates
- Alaska, Hawaii, U.S. Territories: Listed in PM-13, Appendix A
- International Travel: https://allowances.state.gov/web920/per_diem.asp

General Rules

- Lodging rates exclude taxes and fees
- Meals & Incidental Expenses (M&IE) include tips and taxes – no receipts required
  - First/last travel day is limited to 75% of the daily M&IE
  - If meals are provided, full meal rate is deducted
- Incidentals typically include:
  - Domestically - tips for porters, shuttles, etc.
  - Internationally - valets, porters, baggage carriers, hotel staff, complimentary shuttle

Helpful Resources

https://www.lsu.edu/administration/ofa/oas/acctpay/pdfs/travel-updates-10.1.22.pdf

Meals & Incidental Expenses (M&IE)

Expense Item

- Meals & Incidental Expenses (M&IE)

Student Group Trips (including Athletics)

- Eligible for full M&IE if travel begins ≤ 8am or ends ≥ 8pm
- If paid by faculty/staff: itemized receipts required (≤ M&IE rate)
- If cash is paid to students: written certification required (≤ M&IE rate)

Single Day Travel (Employees)

- Expense item: Meal (Single Day)
- Max = 75% of GSA M&IE (no overnight stay; >12 hrs)
- Taxable income; reported to Payroll
- Employees cannot pay for another’s meal
- Department Head approval auto-routed in expense report

LSU Travel Program - Special Events - Travel

- PM-13: University Travel Regulations apply
- AS499 – Special Meal Approval
  - Must be fully completed
  - ECM Spend Authorization required for guest/interview candidates
  - Guest list (name + affiliation) required for meals (not for receptions/refreshments)
  - Purpose/benefit to LSU must be clear (no abbreviations)

- Special Meal Rates (per person, excl. tax & tip):
- Refreshments – $5.50
- Reception – $8.00
- Breakfast – $18.00
- Lunch – $25.00
- Dinner – $45.00

LSU Travel Program - Special Meal Events - Travel

- Business Purpose: Special Meal Events – Travel
- Expense Items:
  - Special Meal - Business Meeting/Event (SC0103)
  - Special Meal - Recruiting (SC0104)
  - Special Meal - Sponsored Programs (SC0105, grants only)
  - Special Meal - Refreshments (SC0070)
  - Special Meal – Funded by Participant Registration (SC0013, if reg. covers 100% of costs)
- Food for Human Consumption (SC0061) – should not be used for special meals
- Itemize:
  - Conference room rental (SC0012)
  - A/V rental (SC0311)
  - Disposable supplies (SC0369)
- Receipts required; max tip = 20%

LSU Travel Program – Expense Report - Workday

- After adding expenses and attaching all documentation, click Submit to route for approval.

- Do not edit or withdraw the Expense Report once submitted.
  - Instead, email any additional documentation or information requested.
  - Editing/withdrawing forces the report back through the approval process.
  - It is treated as a new report, must be re-audited, and returns to the end of the queue.

High Risk Travel to Restricted Regions

LSU Travel Program – High Risk Travel to Restricted Regions (FASOP: AS-18)

- U.S. Department of State issues a Travel Advisory for every country.

- Advisory Levels:
  - Level 1 – Exercise Normal Precautions: Lowest risk; basic safety/security awareness.
  - Level 2 – Exercise Increased Caution: Heightened safety/security risks.
  - Level 3 – Reconsider Travel: Serious risks; avoid travel. U.S. government assistance very limited.
  - Level 4 – Do Not Travel: Highest risk; life-threatening dangers. U.S. government assistance minimal.

- Entire advisory must be read, since some regions within a country may have different levels.

- More info: https://travel.state.gov

LSU Travel Program – High Risk Travel to Restricted Regions (FASOP: AS-18)

- Approval required for all international travel to countries with Level 3 or Level 4 advisories – submit at least 30 days in advance.

- Foreign adversary countries: (Website: https://www.ecfr.gov/current/title-15/subtitle-B/chapter-VII/subchapter-E/part-791/subpart-A/section-791.4)

Approval process:

- Complete form (AS295 or AS296) and send to Patrice Gremillion (atpgremill@lsu.edu).
- Reviewed by International Travel Oversight Committee (ITOC).
- Executive VP & Provost (or delegate) gives final decision.
- If approved, attach form to Spend Authorization in Workday.

Reports

Helpful Workday Reports

- **Find Credit Card Transactions by Employee Cost Center**
  - Provides a list of all employees with credit card transactions for all statuses
- **Find Outstanding Credit Card Transactions by Employee Cost Center**
  - Provides a list of LaCarte transactions that have not been submitted on an Expense Report
- **Find Spend Authorization Report for Cost Center**
- **Find Expense Report by Worktag or Find Expense Report by Cost Center**
  - Provides a list of Expense Reports by employee and/or by a particular worktag or for Cost Center
  - Select only “Draft” and “In Progress” statuses to view tentative transactions

Resources

Resources

- AP & Travel Website (job aids, AS Forms, PM-13, FASOP AS-18, PM-78, etc.)
  - https://www.lsu.edu/workday/finance_training.php
- Accounting Services Newsletter
  - Contact: Danita King(dcking@lsu.edu)
- Business Manager Meetings
  - Hosted by Patrice Gremillion(pgremill@lsu.edu)
- Map Quest or Google Maps for mileage calculations
  - www.mapquest.com
  - https://www.google.com/maps/
- Foreign currency conversion
  - https://www.oanda.com/currency-converter
- Translations
  - https://translate.google.com

Contact Information

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