

## **Travel Arrangements Guide**

This guide summarizes Ames Laboratory's travel policy and procedures as they pertain to domestic and foreign business travel. It is meant to assist employees in planning official business travel. The Ames Laboratory Travel Policy is available on our website [here](#) and should be consulted for further detail regarding travel policy or call the Travel Office at 294-4488 with questions.

### **Conference Approval Authorization**

If you are traveling for a conference, meeting or workshop, approval is needed well in advance. Please start your planning as least six months before the travel date or as early as possible. You will need to contact Cassie Dewey (294-8116) or Leslie Abrahamsen (294-4804) to get conference approval.

### **Foreign Travel Authorization**

The use of federally-appropriated funds for foreign travel may be authorized but must be carefully monitored. All requests for official DOE foreign travel must be reviewed and approved by the Ames Lab Chief Operations Officer at least forty-five days prior to the start of travel. The request form can be obtained on the Ames Lab website [here](#). The request must include a continuous and detailed itinerary and a statement of the purpose form. If vacation is taken on foreign travel there are strict guidelines – see Travel policy. All foreign air travel must be made by “American Flagship” carrier when available. Exceptions may be allowed through submittal and approval of the Foreign Air Carrier Justification form.

### **Travel Authorization**

All official business travel must be authorized prior to the start of the travel. Authorization for travel is initiated with a [Travel Worksheet](#), which is completed, signed by the traveler, and submitted to the Travel Office as far in advance as possible prior to the start of the travel. The Travel Coordinator prepares the appropriate authorization form to be routed for the necessary authorizing signatures.

### **In-State and Out-of-State Travel Authorization**

Submission of a Travel Worksheet signed by the traveler and the account holder is required for all in-state travel outside the Ames area whether traveling by ISU vehicle, privately-owned vehicle, or other means. (These modes of transportation are further discussed in the Transportation section.)

An Out-of-State Travel Authorization must be processed for all official business taking place outside of the state of Iowa. The Travel Authorization will be routed to the account holder(s) and the Ames Lab Chief Operations Officer for signature. Airline tickets required for the travel are authorized for issuance by the Travel Coordinator upon receipt of the Travel Worksheet.

## **Travel Arrangements**

### **Travel and Transport, Inc.**

Travel and Transport, Inc. (213 Duff Avenue, Ames, IA 50010) has been contracted to provide services for the acquisition of airline tickets and associated travel functions for the Ames Laboratory. Employees are required to utilize Travel and Transport for these services, as the agreement provides direct financial and administrative benefits to Ames Laboratory and its employees. Travelers should make their travel arrangements directly with Travel and Transport prior to processing the Travel Worksheet. **Upon receipt of the Travel Worksheet, the Travel Coordinator will request that Travel and Transport issues the airline ticket.** When the Travel Authorization has been fully processed and returned to the Travel Office, the traveler will receive a scanned copy of the complete authorization.

Travel and Transport, Inc.'s local telephone number is 292-8182. Their toll-free number (available 24 hours a day to assist travelers in making schedule changes or resolving other travel-related problems) is 866-963-3062.

### **Concur**

Concur is an electronic online booking tool through Travel and Transport that allows the traveler to book air tickets with a lower agency fee (\$9.00). Instructions to sign up and create a profile can be obtained from the Travel Coordinator 294-4488. Concur is for business travel only. No personal trips. Contacting Concur after hours will cause additional fees.

## **Transportation**

### **ISU Vehicle**

ISU vehicles are available for official business travel for authorized Ames Laboratory employees. These vehicles are not, however, to be used for transportation to the Des Moines Airport to be left for the duration of the trip.

ISU vehicles are to be used only for official Lab business, and only passengers on official Ames Lab business are allowed in vehicles. Authorization for use of ISU vehicles includes a valid driver's license. The traveler is responsible for reserving the vehicle from the ISU Transportation

Services on their online booking tool found [here](#) and for submitting a requisition and Exception Request Form to the travel office so that a purchase order can be processed. Contact the Travel Coordinator for the correct account number to use with ISU. The cost will be charged to the appropriate cost center indicated on the requisition.

## **Privately-Owned Vehicle**

Privately-owned vehicles (POVs) may be used for official business when properly noted on the Travel Worksheet. See Ames Lab Travel Policy 58700.001 for insurance requirements, reimbursement policy, etc. POVs are not covered by Ames Laboratory or University insurance during use for official business. Staff members using their own vehicles on official business must carry their own auto insurance with minimum limits of that required by the State of Iowa and must sign the Travel Worksheet in the appropriate area certifying that this is the case. Repairs to a POV needed or caused while on official business are not reimbursable expenses. Mileage is reimbursable see reimbursement under mileage.

Use of POV to the Des Moines Airport is reimbursable for mileage (84 miles round trip) and parking. Such use is to be noted on the Travel Worksheet.

## **Airline Tickets**

Air travel should be arranged with common carriers. Foreign air travel should be on American Flagship carriers. Unless the preferred airline offers the lowest or equal to the lowest airfare, there will be no consideration of a traveler's preference for a certain airlines. Economy/coach class is to be utilized. If the costs incurred by a Saturday stay provide a significant savings in comparison to a non-Saturday-stay fare, the expenses incurred by the Saturday stay are reimbursable. The stay over must be in the location of the business site.

Airline reservations should be booked through Travel and Transport Inc. (292-8182). When the travel has been appropriately authorized, the airline tickets will be issued.

## **Rental Cars**

Rental cars must be approved by your program director on the [Request for Exception Form](#). Ames Lab has a contract agreement with Enterprise that includes insurance coverage. To direct bill a rental car- Travel and Transport or the Ames Lab Travel Office can make your reservation. Compact, economy, intermediate and standard size cars can be used. Anything larger (full size, minivans, etc.) requires the COO to approve on the Request for Exception form. If Enterprise is not available, Ames Lab also uses National but the traveler must take National Card with them to pay for billing. **Do not purchase additional insurance.**

## **Public Transportation**

Public transportation from Ames to Des Moines Airport is limited.

Crown Limo	515-291-49020 or crownlimo4@gmail.com
Executive Express	888-522-9899 or online <a href="#">here</a>
Cyclone Cab	515-232-1343
Uber	Download the Uber app on your smart phone

## **Cancellations**

### **Airline Tickets**

It is the traveler's responsibility to cancel their air ticket when a meeting is cancelled or they are ill. The best way to cancel is through Travel and Transport or directly through the airline. You must let the Ames Lab Travel Office know via email that you have cancelled the trip. If the airline cancels your flight it should be refunded back to the credit card that purchased it.

### **Hotel Reservations**

The traveler is personally responsible for cancelling hotel reservations when necessary. Refer to the following section regarding penalty charge reimbursement.

### **Penalty Charges**

Penalty charges resulting from failure to cancel reservations when incurred because of traveler convenience or negligence are not reimbursable. Cancellation penalty charges attributable to necessary official business may be reimbursed when a written statement outlining the circumstances, reasons for cancellation, and actions taken is submitted by the traveler via the Program Director/Manager and approved by the Chief Operations Officer.

### **Registration Fees**

Registration Fees can be prepaid by the Ames Lab. Registration fees should be indicated on the Travel Worksheet and a copy of the registration form attached. Any meals included in the registration fees will be excluded from the daily allowance for reimbursable meals.

Registration fees for events in Ames should be submitted on a purchase requisition. No other expenses are reimbursable to Ames Laboratory employees for meetings in Ames without special written approval.

## **Travel Advance**

Travel advances are not generally available for routine business travel. In situations where the travel is for an extended period of time or involves unusual circumstances, a travel advance may be granted. A memo explaining the purpose and necessity of the advance and specifying the date it is needed must be prepared, approved by the employee's Program Director/Manager, and submitted to the Chief Operations Officer for final approval. A copy of the employee's Travel Worksheet must accompany the memo. Travelers will be notified when advance checks are ready to be picked up in the Ames Lab Accounting Office.

A preferred alternative to the travel advance is the use of a Corporate American Express card. Contact Purchasing Program Manager for information.

## **Vacation Combined with Travel**

Vacation time may be combined with official business travel when official business remains the primary purpose of the trip. As such, the total number of vacation days cannot exceed the number of business workdays, including travel days, on the given trip. Proposed vacation time to be combined with official travel must be indicated on the Travel Worksheet. With foreign travel, contact the Ames Lab Travel Office.

## **Reimbursement**

### **Procedure**

Employees will be reimbursed for travel expenses, lodging, and actual meal costs incurred while on approved official business. The traveler should submit a completed Travel Expense Voucher to the Ames Lab Accounting Office or contact Accounting for instructions to complete online.

### **Receipts**

Original receipts must be attached for the following:

- Airline ticket (passenger receipt)
- Lodging receipt
- Registration fees if paid by the traveler
- Reimbursable cash expenditures over \$75.00 (e.g. parking fees, tolls, gas for rental car, taxi, shuttle; must be itemized on the Travel Expense Voucher)
- Rental car receipt

## **Lodging and Meals**

The allowed rates for lodging and meals can be found at the GSA [website](#). The lodging and per diem rate comes from the city/county your hotel is at. The traveler receives 75% of the allowed per diem on first and last day of business travel. For a breakdown of allowed breakfast, lunch, dinner and incidentals see the website [here](#).

## **Mileage**

Mileage is reimbursable for use of a privately-owned vehicle for official business at the current ISU rate. For travel expenses incurred on or after January 1, 2016, the default rate will be 27 cents/mile, a decrease from 28.75 cents/mile. The default mileage reimbursement rate is calculated at 50% of the full IRS rate and is applicable for trips of more than 100 miles if the traveler chooses to use a personal vehicle when a vehicle is available from Transportation Services. The reimbursable mileage is based on the shortest, usually-traveled route. The reimbursement allowance will be based on the lesser of 1) the cost of the trip by car including in route expense and mileage, or 2) the cost of the trip by air carrier and related expenses.

## **Telephone Calls**

Phone calls are reimbursable only if related to official business. A brief explanation of the nature of the call and the person called must accompany the Expense Voucher. A “safe arrival” call up to \$8 is allowed within the second day of travel.

## **Foreign Currency Exchange**

When U.S. currency is exchanged for foreign currency, a dated receipt needs to be obtained which establishes the rate of exchange to be used on the travel expense voucher, and indicates the units of foreign currency and the U.S. dollar amount.