



<b>SOP TITLE:</b>	<b>Travel Procedures</b>
<b>SOP NO.:</b>	<b>1-119</b> <b>First Part Numerical Designator:</b> 1 = Administration and Support 2 = Consensus Standards Development Program (CSDP) 3 = National Environmental Laboratory Accreditation Program (NELAP) 4 = Proficiency Testing Program (PTP) 5 = National Environmental Field Activities Program
<b>REVISION NO:</b>	<b>0</b>

<b>Committee:</b>	Policy	<b>Approved Date:</b>	May 3, 2013
<b>Program:</b>	NA	<b>Approved Date:</b>	NA
<b>Policy Committee Reviewed Date:</b>			NA
<b>TNI Board of Directors Endorsed Date:</b>			May 8, 2013
<b>SOP Effective Date:</b>			

## 1.0 PURPOSE AND APPLICABILITY

Travel costs are the expenses for transportation, lodging, subsistence, and related items incurred by staff, volunteers, and contractors who are in travel status on official business of TNI. Travel costs are allowable when they are directly attributable to specific work for TNI. Advance approval of costs is required for all discretionary or non-routine travel. Non-discretionary or routine travel is staff attendance at conferences and staff or member participation in evaluations of accreditation bodies for the various TNI programs. Although advance approval is not required for routine travel, the same rules for reimbursement apply to those travel costs.

## 2.0 RELATED DOCUMENTS

U.S. General Services Administration per diem rates: [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem)

## 3.0 AVAILABILITY OF DISCRETIONARY TRAVEL FUNDS

TNI has limited funds for discretionary travel. Volunteers requesting travel approval should have exhausted all other potential sources of funding (e.g., from their employers). When using TNI funds, travelers shall incur minimal costs whenever possible, consistent with reasonable convenience. Travelers are reimbursed after the travel is completed. Prior approval by the TNI Executive Director is required for all reimbursable discretionary travel, using the attached form. This form is also available in spreadsheet format from the TNI Executive Director or any TNI staff person, along with the approved form to apply for travel reimbursement.

Individuals approved for travel reimbursement may, upon request to the TNI Executive Director, have the registration fee for TNI conferences (Environmental Measurement Symposium including NEMC, and the Forum on Laboratory Accreditation) waived.

## 4.0 REIMBURSABLE TRAVEL COSTS

Costs for lodging, meals and subsistence shall not exceed federal per diem rates, unless higher rates are specifically approved by the TNI Executive Director. Per diem is the allowance for lodging (excluding taxes), meals and incidental expenses. The General Services Administration (GSA) establishes per diem rates for destinations within the continental United States (CONUS). Travelers should visit the website [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem) to find the rates for the city and state being visited. If the city is not listed, the county may be found. If the city or county are not listed, a standard CONUS rate shall apply.

Travel costs shall be charged on an actual basis for air travel, mileage and other direct costs.

## 4.1 Transportation

4.1.1 Coach-class air or rail travel must use the most direct and convenient route. Only non-refundable airline reservations are permitted, and they must be made at least three weeks prior to the date of travel. Rail travel shall only be approved if it does not exceed the cost of air travel. Use of personal car (reimbursed at the current federal mileage rate), in lieu of air or rail travel, shall only be reimbursable up to the cost of coach-class air or rail travel unless approved as exceptional circumstance.

4.1.2 Personal car (reimbursed at the current federal mileage rate), ground shuttle service, or taxi may be used between the traveler's home or workplace and the airport/rail station; and between the destination airport/rail station and the TNI workplace or hotel.

4.1.3 Rental car use is only permitted with prior approval from the TNI Executive Director.

Although rental car use is generally not allowed, it may be permitted if its cost does not exceed other forms of travel described in Sections 4.1.1 and 4.1.2, or if unusual circumstances justify its use.

4.1.4 The difference in cost between first-class air accommodations and less than first-class air accommodations is not allowable except when less than first-class air accommodations are not reasonably available to meet necessary requirements, such as where less than first-class accommodations would (i) require circuitous routing, (ii) require travel during unreasonable hours, (iii) greatly increase the duration of the flight, (iv) result in additional costs which would offset the transportation savings, or (v) offer accommodations which are not reasonably adequate for the medical needs of the traveler. Any such use of first-class air travel requires the prior approval of the TNI Executive Director.

4.1.5 Direct charges for foreign travel costs are allowable only when the travel has received prior approval from the TNI Executive Director. Each separate foreign trip must be approved. Foreign travel is defined as any travel outside of Canada and the United States and its territories and possessions.

## 4.2 Lodging

4.2.1 For conferences, TNI negotiates a special room rate which may be claimed. **Lodging at hotels other than the conference hotel will not be reimbursed.** For all other travel, lodging more expensive than the applicable federal rate requires justification and prior approval by the TNI Executive Director.

## 4.3 Meals and Incidental Expenses

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4.3.1 Individuals shall be reimbursed at no more than the applicable federal per diem rate. However, when TNI provides breakfast and/or lunch at meetings and conferences, only the additional meals that are not provided (e.g., dinner) may be claimed. In conformance with federal guidelines, 75% of the meal per diem may be claimed on the first and last days an individual is in travel status, unless the traveler's employer reimburses actual expenses only.

4.3.2 Incidental expenses include fees and tips given to porters, baggage carriers, bellhops, hotel maids, etc.

4.4 Non-Reimbursable Expenses

Expense submissions for alcohol, or guests unrelated to the business purpose are not allowable and will not be reimbursed.

5.0 REQUEST FOR TRAVEL APPROVAL

Prior to the intended travel, TNI form "Request for Travel Approval" must be completed with estimated costs and submitted electronically to the TNI Executive Director, who will notify the traveler within two weeks what travel costs have been approved for reimbursement. It is the responsibility of the traveler to submit the form in a timely manner to allow for advance travel reservations and bookings to be made.

6.0 REPORTING OF REIMBURSABLE EXPENSES

An expense form shall be provided to those who are approved for travel support. Expense reports must be returned to the TNI Executive Director accompanied by receipts for all expenditures over \$25.00. However, receipts for meals are not required unless the traveler's employer reimburses only actual expenses. Scanned copies of original receipts are acceptable.

7.0 SOP APPROVED CHANGES

Prev.SOP No.	New SOP No.	Date of Change	Description of Change

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Attachment 1 – Request for Travel Approval (Actual Form provided as Excel Spreadsheet)

## Request for Travel Approval

*The NELAC Institute*

P. O. Box 2439 Weatherford, TX 76086

Name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Email: \_\_\_\_\_ Phone No: \_\_\_\_\_  
 Purpose of trip: \_\_\_\_\_  
 Dates of trip: \_\_\_\_\_

This form must be completed by anyone requesting support for non-routine travel. Please estimate all costs. Please return the completed form, by e-mail, to Jerry Parr, TNI Executive Director, <jerr.parr@nelac-institute.org> at least two weeks prior to the date advance travel reservations and bookings must be made

**All reimbursable travel must conform with the requirements of TNI SOP 1-119.**

### Estimated Transportation Costs

List every mode of travel on a separate line. (Insert additional rows as needed.)

Travel Date(s)	Mode of travel and total cost *						Estimated Cost
	Air	Rail	POV	Taxi	Shuttle	Parking	
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
<b>TOTAL</b>							<b>\$0.00</b>

\*include all taxes and fees, use current federal mileage rate for personal vehicle (POV)

### Estimated Hotel Cost

Daily Hotel Rate: _____	Federal Maximum Hotel Rate: _____
Daily tax on hotel rate: _____ (obtain from hotel)	
Arrival Date _____	
Departure Date _____	Total Hotel Cost: \$0.00

Justification if hotel rate is more than Federal Per Diem allowance for locality:

\_\_\_\_\_  
 \_\_\_\_\_

### Estimated Meal Cost (from Federal Per Diem)\*

Per Day: _____	
Number of Days: _____	Total Meals/Incidentals: \$0.00

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(Arrival & Departure days at 75%)

\*travellers whose employer reimburses actual expenses will be reimbursed at the employer's rate, but federal per diem may be used for this estimate, as a maximum.

**Total Estimated Expenses and Amount Requested**

Total Estimated Expense for Trip:	<u>\$0.00</u>
Contribution from self/other sources:	<u>          </u>
Total Amount Requested from TNI:	\$0.00

Attachment 2 – Expense Report Form (Actual Form provided as Excel Spreadsheet)



# Expense Report Form

The NELAC Institute  
P. O. Box 2439 Weatherford, TX  
76086

Name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Email: \_\_\_\_\_ Phone No: \_\_\_\_\_  
 Purpose of trip: \_\_\_\_\_

**ATTACH ALL RECEIPTS**

DATE									TOTALS FOR THE PERIOD
FROM									
TO									
TO									
TO									
<b>TOTAL AUTO MILEAGE</b>									\$0.00
<b>MILEAGE @ \$.55/MILE</b>									\$0.00
<b>LODGING</b>									\$0.00
<b>BREAKFAST</b>									\$0.00
<b>LUNCH</b>									\$0.00
<b>DINNER</b>									\$0.00
<b>TIPS</b>									\$0.00
<b>FEDERAL PER DIEM</b>									\$0.00
<b>PER DIEM FIRST/LAST</b>									\$0.00
<b>TELEPHONE</b>									\$0.00
<b>TAXI-LIMO</b>									\$0.00
<b>AIRFARE</b>									\$0.00
<b>AUTO RENTAL</b>									\$0.00
<b>PARKING-TOLLS</b>									\$0.00
<b>MISCELLANEOUS</b>									\$0.00
									\$0.00
									\$0.00
<b>TOTALS FOR THE DAY</b>									\$0.00
									<b>TOTAL EXPENSES</b>
									<b>LESS CASH ADVANCED</b>

Miscellaneous Details & Remarks

Date \_\_\_\_\_ Item \_\_\_\_\_ Description/Location/Purpose \_\_\_\_\_

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<b>AMOUNT DUE</b>	
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*I CERTIFY THAT THIS STATEMENT  
IS ACCURATE AS TO ACTUAL &  
NECESSARY BUSINESS EXPENSES.*

Signed: \_\_\_\_\_

Approved: \_\_\_\_\_

Account # \_\_\_\_\_

*Please attach all receipts and forward to:*

Jerry Parr  
The NELAC Institute  
PO Box 2439  
Weatherford, TX 76086