



SOP TITLE	Travel Procedures
SOP NO.	1-119
REVISION NO	0.2
PROGRAM	Administration

SOP Approval Dates

	Initial Approval	Last Revision	Last Review
Committee: Finance	2/19/2013	9/5/2023	
Program	NA		
Policy Committee Review	5/3/2013	6/21/2024	
TNI Board of Directors Endorsement	5/8/2013	NA (7/10/2024)	
Effective Date	5/8/2013	9/5/2023	

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.

This SOP does not apply to travel reimbursed by an organization other than TNI.

2.0 RELATED DOCUMENTS

U.S. General Services Administration per diem rates: www.gsa.gov/perdiem
POL 1-112, Travel

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 must 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 along with the approved form to apply for travel reimbursement.

Upon request, the TNI Executive Director may waive the registration fee for TNI conferences (Environmental Measurement Symposium including NEMC, and the Forum on Laboratory Accreditation) for individuals with approval for travel reimbursement.

4.0 REIMBURSABLE TRAVEL COSTS

Costs for lodging, meals and subsistence must 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 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 applies.

Travel costs are 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. Exceptions can be granted if approval from an organization other than TNI is delayed. Rail travel is 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, is 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, ride sharing 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 business or first-class air accommodations and less than business or first-class air accommodations is not allowable except when less than business or first-class air accommodations are not reasonably available to meet necessary requirements, such as where less than business or 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 business or 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

For conferences, TNI negotiates a special room rate which may be claimed. **Lodging at hotels other than the conference hotel are not 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

- 4.3.1 Individuals are 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 are not be reimbursed.

5.0 REQUEST FOR TRAVEL APPROVAL

Prior to the intended travel, the TNI Request for Travel Approval form (Attachment 1) 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 (Attachment 2) 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

Revision No.	Effective Date	Description of Change
0	5/8/2013	New Document
0.1	9/7/2018	Minor update revisions
0.2	9/5/2023	Added POL-1-112 to Related Documents. Changed shall to must and changed future tense to present tense.

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
TOTAL							\$0.00

*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: _____	Total Meals/Incidentals: \$0.00
Number of Days _____	
(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								
TOTAL AUTO MILEAGE								\$0.00
MILEAGE								\$0.00
LODGING								\$0.00
BREAKFAST								\$0.00
LUNCH								\$0.00
DINNER								\$0.00
TIPS								\$0.00
FEDERAL PER DIEM								\$0.00
PER DIEM FIRST/LAST								\$0.00
TELEPHONE								\$0.00
TAXI-LIMO								\$0.00
AIRFARE								\$0.00
PARKING-TOLLS								\$0.00
MISCELLANEOUS								\$0.00
								\$0.00
								\$0.00
								\$0.00
TOTALS FOR THE DAY								\$0.00
TOTAL EXPENSES								
LESS CASH ADVANCED								
AMOUNT DUE								

Miscellaneous Details & Remarks

Date	Item	Description/Location/Purpose

Travel Procedures

*I CERTIFY THAT THIS STATEMENT
IS ACCURATE AS TO ACTUAL &
NECESSARY BUSINESS EXPENSES.*

Signed: _____

Please attach all receipts and forward to:

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

Approved: _____

Account # _____