



UNM HEALTH SCIENCES | UNM HEALTH

Contract & Grant Accounting Quarterly Training

May 26, 2023



Agenda

- Travel Policy 4030 – Common non-compliance issues
 - <https://policy.unm.edu/university-policies/4000/4030.html>
- Comprehensive Travel Booking Tool
- Questions and Next Training Topics

Travel Policy Non-compliance

- Not including required documentation
- Purchasing meals for other UNM Employees at Conferences
- Airline Quote Issues
- Rental Cars
- Ride Hailing Apps and Taxi charges
- Upgrades, room charges and other additional costs

Required Documentation

3.2. Documentation

Travelers seeking reimbursement of travel costs incurred using personal funds should submit a request via Chrome River Expense. Travelers may delegate the authority to submit such requests. **The University business purpose of the travel, and all required supporting documentation (including receipts) must be provided.** The traveler and the applicable dean, director, or department head must approve the request in Chrome River Expense. For travelers whose costs will be covered under a contract or grant, the principal investigator (PI) for the contract or grant is required to approve the request in Chrome River Expense, in lieu of the dean, director, or department head. If the traveler is a dean, director, department head, or PI, the traveler's supervisor must approve the request in Chrome River Expense.

To expedite processing of requests for travel reimbursement, travelers should thoroughly explain their travel claims and provide itemized receipts and supporting documentation to verify that the expenses were paid by the person being reimbursed. This is important for processing and to satisfy internal and external reviews and audits. If receipts are unavailable, the traveler must certify in Chrome River Expense that no other reimbursement claim will be submitted to any other entity. This certification will also route to the applicable dean, director, department head, or PI, who must also indicate approval via Chrome River Expense, and indicate that the department assumes responsibility for any duplicate payment.

Flight Purchase Support

- Section 8.2 - The University will pay the cost of commercial airline travel at the least expensive economy- or coach-class rate with reasonable additional fees that meets the business needs or requirements of the traveler.
- Need supporting documentation for verification that the least expensive options was purchased.
- Travelers may always upgrade to other than economy- or coach-class accommodations at their personal expense, including through the redemption of frequent flyer benefits.

Exceptions to Economy

- Section 8.2.1 – There are available exceptions to purchase for higher class.
 - International Travel is certain cases
 - When a higher class results in a savings to the University
 - To accommodate a documented medical disability or other special need.
- It is the traveler's responsibility to provide documentation of the appropriate exception when applicable.

Personal Travel

13.1. Airfare

The business traveler's airfare, as described in this policy, will be reimbursed to and from the work location to the business destination.

Airfare to and from a personal destination is not allowable, unless documentation is provided showing that the cost was less than the airfare to and from the business destination. In such cases, Financial Services must be provided with documentation that shows what the airfare costs directly to and from the business destination, for the actual dates of the business event, would have been. The documentation should be from a travel site, such as Travelocity or Expedia, and include at least the three (3) lowest-cost flight choices; when applicable, Southwest Airlines' airfare also should be included as a comparison. The lowest cost, using a reasonable flight schedule based on the dates and times of the business event, will be used to determine what is allowable. If contemporaneous documentation is not provided, Financial Services will conduct a post-travel-date comparison. Comparison methodology is located on the Unrestricted Accounting-Main website.

Purchasing Meals for others on Travel

12. Lodging and Meals

Travelers may be reimbursed expenses for lodging and meals, subject to the limitations of this section. Per diem meal reimbursement includes the actual cost of food, beverages, gratuities, and incidental expenses. Receipts are not required for travel costs reimbursed on a per diem basis. Normally, the traveler will use the per diem rate for the location where the business event occurred. If the traveler uses a different rate, an explanation must be provided in the request in Chrome River Expense.

Reimbursement requests for actual expenses incurred by a UNM individual (faculty, staff, or student) when purchasing meals for other UNM individuals while traveling as defined in Section 3.1 of this policy, who therefore qualify for per diem reimbursement, is not generally allowable. Each such individual is entitled to request the appropriate meal per diem amount provided for under this policy.

Travelers may be reimbursed for lodging and meal expenses by any one of the methods listed below.

Ride Hailing Apps and Taxi Services

9.5. Taxi Fares

Taxi fares may be reimbursed for travel to and from a business destination such as airport, hotel, conference site, or other location necessitated by the business trip. Taxi fares for travel to restaurants for personal meals or other locations of personal interest are not allowed.

Rental Car Purchase

9. Automobile Travel

9.1. Rental

Travelers are encouraged to use cost effective public transportation when available, but are authorized to rent automobiles when necessary. The business need for the rental car must be fully explained in the reimbursement request. Reimbursement for expenses incurred when traveling by a rented automobile in lieu of air travel for out-of-state travel may not exceed the cost the traveler would have otherwise incurred if the traveler had flown. Due to the increased risk of rollover accidents associated with fifteen (15) passenger vans, these vehicles may not be rented for University business. Travelers should use the services of those vendors with which the University has contracted for favorable terms, Enterprise and National. However, if a different vendor has more favorable rates, that vendor may be used.

It is recommended that the driver of a rental car for UNM business purposes obtain a UNM driving license or complete defensive driving training, such as the National Safety Council Defensive Driving Course.

Upgrades, room charges and other additional costs

- Not staying at conference location
- Room upgrades
- Flight changes and/or cancelations
- Room charges for food not deducted from the hotel invoice
- Deviations from policy or normal/traditional travel expenses should include robust documentation and all required supporting documentation

Why is this necessary?

- Review and approval of requirement documentation and policy requirements helps to:
 - Expediate payment to the traveler
 - Protect the traveler from incurring purchases that cannot be reimbursed.
 - Provide stand alone documents in Audit or Sponsor Review.

Resources

- UNM Travel Portal -
https://travel.unm.edu/index.html?_gl=1*_sispa1*_gcl_au*MjAyMzY0NzkxLjE2ODQ4NjE4NjI.
- Chrome River Resources-
 - <http://chromeriver.unm.edu/>
 - Chrome River Info Sessions (CRIS)
- Unrestricted Accounting Checklist
 - <https://ua.unm.edu/travel/checklist-for-chrome-river-travel-report-preparers.html>
- UNM Travel Booking Tool

Next Training Topics

- NIH Salary Cap Calculation Best Practices
- Consultants vs Subrecipients
- Extra Compensation
- Participant Incentives
- General Use Equipment/Software
- Honorarium

Questions

