

SOP – Biology Department Seminar Travel Procurement and Reimbursement Procedures

Department of Biology	Policy and Procedure
SOP – Biology Department Seminar Travel Procurement and Reimbursement Procedures	Document ID:
Section: Seminar Speakers	Location: http://biology.unm.edu
Subject: Seminar Procedures	Issued By (Owner): M. Wonn
Total Pages:	Approved By:
	Effective Date

Purpose

The purpose of this document is to identify and allowable reimbursement costs by the Biology department for the weekly departmental seminar speakers.

Policy

This procedure applies to employees hosting a departmental seminar speaker in the Department of Biology.

Definitions

Host: the person that is responsible in the department for hosting the seminar guest.

Seminar Speaker: a faculty member from another institution invited to UNM for weekly presentations to enhance the education and knowledge of faculty, staff, students, alumni, and guests in areas of Biology.

Controls

Weekly Seminar guests are determined and scheduled by the Chair of the Seminar Committee. These names of guests are published on the Biology website to ensure that appropriate arrangements are being made.

Any exceptions to policy must be made in writing by the host to the Seminar Committee Chair or the Department Chair for approval.

Responsibilities

Seminar Committee: A committee in the department comprised of faculty members, graduate students, and staff members that assist in helping to determine which seminar guests to host at UNM.

Seminar Guest: The seminar guest is typically a faculty member from an outside institution that is being brought the Biology department for purposes of Biology presentation.

Department Chair: The Department Chair has the authority to grant exceptions and will sign as the Supervisor for reimbursements.

Prerequisites and Required Items

None.

Overview for Reimbursement and Requesting Exceptions when Hosting a Faculty Search Member

The Department of Biology will reimburse expenses associated with seminar guests per the following policy. Requests for variation must be submitted in writing for approval by the Department Chair. Hosts for meals or other functions for seminar guests are responsible for any non-approved charges which exceed either the following guidelines or any special requests approved by the Chair. Hosts are also responsible for providing receipts for all expenses to be reimbursed.

The UNM Regent's Policy covers entertainment expenses for meals and prohibits reimbursement for alcoholic beverages. Approved entertainment expenses are as follows:

Meals: The department will reimburse costs for the seminar speaker and three designated representatives of the Biology Department (usually the host and two additional faculty members,

graduate students, or spouses). Meal expenses for additional UNM faculty, staff, graduate students, and spouses will not be reimbursed.

Meal Costs: Reasonable expenses allowed for meals are \$9.80 for each person (up to four) for breakfast; \$12.25 for each person (up to four) for lunch; and \$26.95 for each person (up to four) for dinner. No alcoholic beverages are covered.

Travel and Lodging: The Biology Department follows official UNM Travel Policy and Procedures for travel and lodging.

Details for Reimbursement and Requesting Exceptions when Hosting a Seminar Speaker

Seminar Speaker hosts should follow the procedures outlined below to ensure timely reimbursement for both themselves and the job candidates.

1. Issues of Special Importance
 - a. Alcoholic beverages are *a/ways* a prohibited expense. As noted previously, this is a UNM Regents' policy and cannot be waived by the Biology Department.
 - b. Internal order forms must be used to process requests for reimbursement for both the host or seminar speaker. Social security numbers and home addresses must be provided for all individuals requesting reimbursement. If the person to be reimbursed is an UNM employee, then all that is required is a Banner ID number. It is the responsibility for the host to get this information from the seminar speaker if he/she needs to be reimbursed.
 - c. Business purpose information on the internal order form **MUST** state that these charges are expenses incurred for a Biology Department Weekly Seminar Speaker visit and must include the name of the speaker and the dates of the presentation and must state that no alcohol charges are included in the reimbursement request.
 - d. Reimbursement for foreign nationals and foreign travel require special approvals and may require a particular visa status. This approval needs to be routed via Taxation prior to making any arrangements or reimbursements. Hosts need to see the

Biology Department Administrator at least two weeks prior to making final arrangements for the seminar speaker.

2. Reimbursement Policies and Procedures:

- a. Provide all receipts for all expenditures.
- b. No alcohol (see 1a).
- c. Travel:
 - i. Airfare/Train: Economy class within the continental US is acceptable with a four week advanced purchase. Hosts should contact either the Department Administrator or the Travel/Reimbursement Administrator in the Department Accounting office if they would like the Biology Department to purchase airfares directly. The host and/or the candidate must provide a preferred itinerary for the Administrator. The Department prefers to book all travel upfront instead of having the seminar speaker incur out of pocket charges.
 - ii. Automobile: Seminar speakers can be reimbursed at the standard UNM mileage rate of \$0.505/mile if they drive their own vehicles. If the candidate is driving from another state, the maximum mileage reimbursement cannot be greater than what economy class airfare with a four week advanced purchase would have cost.
 - iii. Transport between the speaker's hotel, the airport, train station, and the Biology Department cannot be reimbursed without a receipt.
- d. Lodging:
 - i. Lodging for two nights will be covered at the standard room rates for UNM approved hotels. A third night can be covered with advance approval from the Department Chair. As soon as possible, hosts need to contact the Administrative Assistant in the Accounting office to make arrangements for the Biology Department to directly pay for the seminar speaker's room using UNM rates. Rate inquiries should be made to reduce unusually high costs during peak travel times (ie Balloon Fiesta, Thanksgiving, etc). The preferred Department vendor for lodging accommodations is Embassy Suites. Please see the

Travel/Reimbursement Administrator to make these arrangements.

- ii. If UNM approved hotels are full or charging excessive amounts, then comparable rates should be sought at other establishments. Receipts must be provided.

e. Meals:

- i. The Biology Department will reimburse meal charges (excluding alcohol) for the seminar speaker, and three designated departmental representatives who usually include the host and two other faculty members, graduate students, or spouses. Meal receipts are required and must be taped to a blank sheet listing the names of all four persons whose meals are purchased.
- ii. Federal per diem rates for Albuquerque should be used for determine reasonable rates per person for each meal (not to exceed four people). As noted previously, the current per diem rates are \$9.80 each for breakfast; \$12.25 each for lunch; and \$26.95 each for dinner.
- iii. Hosts will not be reimbursed for excessive meal charges whether the charges result from additional attendees or higher meal costs.
- iv. Receptions: The department will host a reception for all weekly seminar speakers prior to their presentation. If a holds a reception for the seminar speaker at his or her house or another establishment in lieu of dinner, the Biology Department will reimburse the host for food charges (no alcohol) up to a \$107.50 maximum. Receipts are required.

Records Management

All reimbursement requests and supporting documentation are maintained by fiscal year in the department archives for five years by fiscal year by employee last name. At the end of the fifth year, all records are sent to Cintas, Inc. for secure shredding.

Approvals and Authorization

Name:		Title:
Revision Number	Approval Date	Comment

Revision Detail:

Current Version Date:		Next Review Date:
Revision Number	Revision Date	Description and Author

Distribution

Name	Title