TENNESSEE BOARD OF REGENTS

SUBJECT: General Travel

The following policy applies to the travel of all employees of the institutions and Tennessee Technology Centers governed by the Tennessee Board of Regents, as well as members of the Board staff, in the performance of their official duties. Provisions of this policy also may apply to individuals other than employees who are authorized to travel at institutional, school, or Board expense. Specific provisions of the policy also address the travel of Board members, pursuant to Tennessee Code Annotated 4-3-1008. Authorization for travel will not be granted and expenses will not be reimbursed unless the travel is made and reimbursement claimed in accordance with this policy and any approved exceptions hereto. Procurement cards shall not be used for travel expenses except in instances of team/group travel.

This policy and specific reimbursement rates for travel expenses allowed under this policy shall be consistent with those of the Comprehensive Travel Regulations of the State of Tennessee. Exceptions which may be deemed necessary and approved by the Board shall be submitted for consideration by appropriate State officials. Current reimbursement rates shall be issued by the Chancellor as an addendum to this policy.

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II. General Provisions

1. No authorization for travel by any employee shall be granted, and no reimbursement for travel expenses shall be made, except in accordance with the provisions of these policies and procedures. Reimbursement for travel expenses shall be limited
to expenses incurred upon travel authorized in advance in accordance with Section III.

2. Travel which may be authorized, and pursuant to which expenses may be reimbursed, shall be limited to the following:

   a. Travel which is necessary for the proper execution of official System business, or in justifiable pursuit of an institution's or school's educational and research objectives; or

   b. Travel to meetings and conferences of a professional nature which will increase the attending employee's usefulness to the System.

3. Travel shall not include, and no reimbursement for expenses shall be made for, transportation in connection with an employee's official station of employment. The employee's "official station" is his or her regular area of employment activity, e.g., office headquarters, campus, or designated location of an employee established in the field.

   The official station of an employee shall be designated by the appointing authority. It is normally expected that the official station is that location at which the employee spends the major portion of his working time. For an employee required to be on call (as determined by his or her job description), either overnight or on weekends, the official station of the employee while on call becomes his or her residence, or the location at which the employee receives the call. Reimbursable mileage begins at the location at which the employee receives the call.

4. The employee is considered to be on official travel status, and as such, eligible for reimbursement of travel expenses, at the time of departure from the employee's official station or residence, whichever is applicable, for the purpose of traveling on state business. Expenses for meals will be allowed when overnight travel or occasional excessive hours of work are required outside the county of the employee's official station or residence. En route lodging will be allowed for only one day each way on trips of long duration. Expenses for lodging will only be allowed in cases where the approved and most direct or expeditious mode of travel will require more than ten (10) hours of continuous travel for trips of long duration. The lodging expense will not be considered en route lodging if it does not add an additional day of lodging expense. For example: An employee has a 9:00 a.m. meeting in Atlanta, GA. Assume the employee needs to work a full day prior to the trip. It would be less expensive and more convenient to drive rather than fly. The employee leaves the night before and drives to within two
hours of Atlanta. They spend the night, continue the drive the next morning and arrive for the 9:00 a.m. meeting. This will be reimbursed but is not considered en route lodging as it did not add an additional day of lodging expense to the normal travel expenses.

5. The limitations on travel expenses contained herein are maximum amounts above which reimbursement shall not be made. Employees are expected to be as conservative as possible in incurring travel expenses.

6. Reimbursement for travel expenses shall only be allowed for actual expenses incurred, subject to the maximum limitations shown on the Addendum. Receipts must accompany claims for reimbursement for all expenses exceeding the amount cited on the Addendum. The exceptions to this rule are for meals, taxi fares, tolls and ferry fees, with no receipt required. Lodging receipts are required and must itemize room charges and taxes.

7. When using websites (such as Expedia.com, Travelocity.com, Hotwire.com, etc.) to make travel arrangements using package deals, documentation is required for each specific item included in the package such as airfare, hotel, and rental car. Documentation should be provided to substantiate the conformance with set rates as established in CONUS and in the general travel policy. If such documentation cannot be obtained from the website or vendors, the employee is responsible for comparing the package price to the separate coach airfare rates, hotel rates (as allowed by CONUS/conference rate) and vehicle rental rates and providing documentation to reflect that the package price is less expensive than fares allowed individually. When the website documentation is not sufficiently detailed, a signed statement by the employee (along with documentation from separate coach airfare rates, hotel rates, etc.) referencing the comparison above is to be attached to the travel claim to certify that a reasonable effort was made to procure the best price for the college or institution. The employee is responsible for abiding by rates as approved by TBR.

III. Authorization of Travel

1. **Approving Authorities** - The president or director or his or her designees shall have authority to approve travel by employees of the various institutions and schools. The Chancellor or his or her designees shall have authority to approve travel by employees of the Board. Authorization for travel by a student, regardless of the destination, shall be approved by the president or director of the institution or school or his or her designee.
2. **In-State Travel** - All employees must obtain prior authorization for in-state travel by the employee's appropriate approving authority. Written authorization may not be necessary for in-state travel where the expected expenses will not be substantial, or when there is no advance notice of the circumstances necessitating the travel, and such travel is approved orally by the appropriate approving authority. Employees whose employment requires frequent in-state travel may obtain blanket authorization in writing for such travel.

3. **Out-of-State Travel** - All employees must obtain prior written authorization for out-of-state travel, which must be approved by the employee's appropriate approving authority. The authorization must show the name of the person traveling, purpose of the trip, destinations, date of departure and return, mode of transportation, estimated expenses, and availability of funds. If, in the normal course of official business, the employee must routinely travel into another state and back in the same day, such travel will be considered in-state travel and shall be subject to the in-state travel provisions. This exception applies for trips which do not exceed 50 miles into another state. Employees whose employment requires frequent out-of-state travel may obtain blanket authorization in writing for such travel.

4. **Canada Travel** - Authorization for travel by an employee to Canada shall be approved by the president for employees of institutions, the Vice Chancellor for Vocational Education for employees of the schools, and the Chancellor for employees of the Board.

5. **All Other Travel** - Authorization for travel by an employee to Alaska, Hawaii, and all other out-of-country travel shall be subject to recommendation by the president of an institution in the case of institutional employees, the director of the school in the case of school employees, and written advanced approval by the Chancellor.

IV. **Transportation**

1. **General** - All travel must be by the most direct or expeditious route possible, and any employee who travels by an indirect route must bear any extra expense occasioned thereby. When work is performed by an employee in route to or from the official station, reimbursable mileage is computed by deducting the employee's normal commuting mileage from the actual mileage driven in performing the work in route to or from the official station. For example, if an employee normally commutes 10 miles...
(20 miles round trip), and performs work on the way home from the official station which results in 12 miles driven, the mileage reimbursement will be for 2 miles only, as that is the amount of mileage in excess of the employee's normal commute. In no instance shall mileage claimed for reimbursement exceed actual miles traveled.

2. Mode of Transportation - Transportation for employees traveling singly should be by common carrier (air, train, or bus) whenever practical. The use of air travel is recommended when time is an important factor or when the trip is so long that other methods of travel would increase the subsistence expense. Automobile transportation may be used to save time when common carrier transportation cannot be satisfactorily scheduled, or to reduce expenses when two or more employees are making the trip. Reimbursement for personal vehicle use may be claimed at the standard mileage rate provided that the cost of such reimbursement is less than comparable cost of commercial transportation including taxi fares and/or limousine charges.

3. Common Carrier Travel - When travel is by common carrier, the fare must not exceed the regular tourist fare charged the general public, and advantage must be taken of round trip rates when available. The employee's copy of the ticket, or an acceptable receipt, must be submitted for reimbursement of common carrier expenses.

4. Chartered Aircraft - Generally, faculty and staff (including group travel and athletics) whose duties require travel will use commercial ground and air carriers or a university/college/technology center automobile. However, a chartered aircraft may be used if time and/or distance preclude ground travel or if a commercial air service is either unavailable or does not meet the needs of the traveler(s). The following guidelines apply:

a. The chief executive officer of each institution shall assign the following duties to a responsible official: (1) reviewing and approving requests for charter air services, (2) scheduling charter flights, and (3) informing those who request charter flights of the charter company’s policy on canceling scheduled flights.

b. Charter services will be obtained only when it can be shown that the charter does not exceed the sum of all traveling costs by commercial carrier (e.g. transportation, meals, and lodging) or that circumstances necessitate travel when no other means is available.

c. The charter company must provide the institution with an original, itemized invoice showing the beginning and ending dates of the charter, the origin and destination of each
flight, and the names of passengers on each flight.

5. **Automobile Travel** - When travel by automobile is appropriate, employees may use state-owned automobiles whenever available and feasible. However, state-owned vehicles should be used only on official business.

   a. **State Owned Automobiles** - When transportation is by a state-owned automobile, tolls, parking, gasoline and storage expenses are allowable. When using motor pool automobiles, employees will be furnished with courtesy cards for purchase of gasoline, oil, and other automobile services, and such expenses should not be claimed by employees as travel expenses. Emergency out-of-pocket expenses, such as towing or emergency repairs, will be reimbursed but must be accompanied by proper receipt identifying the automobile and itemizing the services. Such expenditures must be of an emergency nature where immediate service is required and access to a state facility is not possible. Major repairs should be approved by campus officials prior to work being performed. Such expenditures are allowed but should be filed for reimbursement separately.

   b. **Personally-Owned Automobiles** - Use of a personally-owned automobile must be authorized. Mileage reimbursement rates are provided on the Addendum. The authorized mileage allowance includes all operating expenses such as gas, oil, and repairs precluding any separate claim for such items. Employees may use reputable websites to determine point-to-point and/or vicinity mileage.

   c. The travel claim must indicate the employee's itinerary and must show the official business mileage. Business mileage as indicated by the official state map or reputable websites, and that published by Rand-McNally or reputable websites for out-of-state routes will be regarded as official. Vicinity mileage must be reported on a separate line and not included with point-to-point mileage. Only mileage on official business may be claimed.

   d. Necessary charges for hotel and airport parking will be allowed provided that airport parking fees do not exceed normal taxi fare to and from the airport or the cost of two round trips in the employee's personal car (see item 10 below). Receipts must be furnished on airport and hotel parking.

6. **Limousine and Taxi Service** - When travel is by common carrier, reasonable limousine and taxi fares will be allowed for
necessary transportation. Bus or limousine service to and from airports will be used when available and practical. After arrival at destination, necessary taxi fares for traveling between hotel or lodging and meeting or conference will be allowed. No receipt is required for reimbursement of reasonable taxi fares.

7. **Car Rentals at Destination** - Charges for automobile rental shall be allowed whenever it is more economical than alternative methods of transportation or it is the only practical means of transportation. Charges for insurance for rented automobiles are not reimbursable. Whenever possible, employees should refuel before returning vehicles.

8. **Tolls and Ferry Fees** - Reasonable tolls and ferry fees will be allowed when necessary. No receipt is required for reimbursement of tolls and ferry fees.

9. **Daily Parking Fees** - Daily parking fees for those employees working in downtown offices will not be allowed. However, if an employee is required to leave his office on official business and later returns the same day, the actual additional charge required to park will be reimbursed up to the maximum indicated (see Addendum). Also, those employees required to utilize commercial parking facilities in the daily performance of duties, or while on travel status, will be allowed reimbursement for actual costs. Receipt is required if the fee exceeds the maximum indicated per day (see Addendum).

10. Unnecessary meals and lodging expenses which are occasioned by the use of an automobile for reasons of the employee's personal convenience, or which are due to travel by an indirect route, will not be allowed.

11. If travel is by common carrier, the employee will be reimbursed for expenses in traveling to and from the common carrier including but not limited to the reasonable cost of one of the following options, whichever is less:

   a. one round trip taxi fare,

   b. or parking of the employee's personal car at the location of the common carrier, plus mileage of one round trip,

   c. or mileage of two round trips in the employee's personal car (subject to a 200 mile maximum for two round trips).

Receipts must be furnished on airport and hotel parking exceeding maximum parking allowance in Addendum.
V. Lodging

1. In-State Lodging - Lodging expenses incurred within the state while on authorized travel will be reimbursable to the maximum shown on the Addendum.

2. Out-of-State Lodging - Lodging expenses incurred out of the state while on authorized travel will be reimbursable to the maximum shown on the Addendum. The maximum reimbursement rates for out-of-state travel are the same as those maintained by the U. S. General Services Administration for federal employees within the continental United States (CONUS). The CONUS list, available on the General Services Administration web site, contains a standard reimbursement rate for lodging and meals and incidentals, and several pages of exceptions. Most destinations for out-of-state travel fall within the list of exceptions. En route lodging will be allowed for only one day each way on trips of long duration. En route lodging will only be allowed in cases where the approved and most direct or expeditious mode of travel will require more than ten (10) hours of continuous travel. (Refer to Section II.4. for explanation of en route lodging expenses.)

3. Additional Lodging Expenses - Sales taxes on lodging costs will be reimbursable. Higher rates for lodging at the location of a convention or conference will be allowed, without special approval, up to the amount indicated in the convention or conference brochure. If more than one rate is indicated, the lowest rate is the amount which will be reimbursed. However, the employee should attempt to receive a government rate for the lodging. If the lowest rate indicated in the convention or conference brochure is unavailable, approval of the higher rate must be obtained from the appropriate approving authority. Additional lodging for presidents/directors will be approved on the same basis as approval is granted for other employees. Any exceptions must be approved by the Chancellor. The convention or conference brochure which indicates the lodging rates must be included with the travel claim. Otherwise, reimbursement will be limited to the applicable lodging rate as provided in these regulations.

4. Shared Lodging - When employees share a hotel room, each employee should claim a proportionate share of the room cost, and include an explanation with his or her travel claim detailing dates and other employees with whom the room was shared. If a room is shared with other than a state employee, actual cost subject to the maximum in the Addendum will be allowed. The receipt for the entire amount should be submitted with the
VI. Meals

1. In-State and Out-of-State Meals - Meals while on authorized travel will be reimbursed, subject to the meal allowance provided on the Addendum. The maximum per diem rates include a fixed allowance for meals and for incidental expenses (M&I). The M&I rate, or fraction thereof, is payable to the traveler without itemization of expenses or receipts. Incidents are intended to include miscellaneous costs associated with travel such as tips for baggage handling, phone calls home, etc.

The M&I rates for out-of-state travel are the same as those for federal employees, and are available on the General Services Administration’s web site. As with lodging, there is a standard rate for the continental United States (CONUS), and a list of exceptions. Reimbursement for meals and incidents for the day of departure shall be three-fourths of the appropriate M&I rate (either the in-state rate or CONUS rate for out-of-state travel) at the rate prescribed for the lodging location. Reimbursement for M&I for the day of return shall be three-fourths of the M&I rate applicable to the preceding calendar day. To assist in this calculation, the following table lists partial per diem rates for meals and incidentals for in-state and out-of-state travel.

<table>
<thead>
<tr>
<th>Per Diem Rates - Three-fourths Calculations</th>
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<tbody>
<tr>
<td>$31</td>
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<tr>
<td>$38</td>
</tr>
<tr>
<td>$39</td>
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<tr>
<td>$44</td>
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<tr>
<td>$59</td>
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<tr>
<td>$64</td>
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</tbody>
</table>

The following table may be used to determine reimbursement for a single meal, when appropriate. Reimbursement for meals will not be permitted when overnight travel is not involved.

In-State and Out-of State of Tennessee Meals and Incidental - Allocated by Meal

<table>
<thead>
<tr>
<th>Per diem</th>
<th>31</th>
<th>38</th>
<th>39</th>
<th>44</th>
<th>49</th>
<th>54</th>
<th>59</th>
<th>64</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>8</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
</tr>
<tr>
<td>Lunch</td>
<td>6</td>
<td>10</td>
<td>8</td>
<td>12</td>
<td>13</td>
<td>15</td>
<td>16</td>
<td>18</td>
</tr>
<tr>
<td>Dinner</td>
<td>16</td>
<td>18</td>
<td>20</td>
<td>21</td>
<td>24</td>
<td>26</td>
<td>29</td>
<td>31</td>
</tr>
<tr>
<td>Incidents</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

Revisions to the above two tables that are required solely by changes in CONUS rates will not be subject to Board approval.

2. Official Banquets - When the expenses for an official banquet of a meeting or conference is in excess of the meal allowance, the
excess will be allowed provided a receipt or proper explanation of the charge is submitted.

3. **Business Meals** – See Policy 4:07:00:00 for criteria on reimbursing business meals.

**VII. Miscellaneous Expenses**

1. **Personal Expenses** – Expenses for entertainment (employee or others), laundry, valet service, tips and gratuities, etc., are personal expenses and will not be reimbursed in excess of the incidental portion of the M&I rate.

2. **Telephone, Telegram and Fax Expenses** – Charges for long distance telephone calls, telegrams, and/or fax on official business will be allowed provided a statement is furnished showing the date, the name and location called, and the purpose of the call. Charges for necessary local calls on official business will be allowed.

3. **Registration Fees** – Registration fees for approved conferences, conventions, seminars, meetings, etc., will be allowed including cost of official banquets and/or luncheons, if authorized in advance by the appropriate approving authority, and provided receipts are submitted with the travel claim.

4. **Handling Fees** – Fees for the handling of equipment or promotional materials will be allowed up to the maximum indicated (see Addendum).

**VIII. Claims**

The standard form for claims for travel expenses approved by the President, director or Chancellor shall be used for reimbursement of expenses. The form must show movement and detail of expenses on a daily basis, be signed in ink by the employee, and be approved by the appropriate approving authority prior to reimbursement. All signatures on travel claims must be original. Receipts for appropriate expenses must be attached to the form. Expenses for books, supplies, postage, and other items that do not constitute actual traveling expenses should not be included in the claim form. Claims for reimbursement for travel expenses should be submitted no later than thirty (30) days after completion of the travel.

**IX. Travel Advances**

1. **General** – Normally, travel expenses should be paid when incurred by an employee, with reimbursement made to the employee for actual expenses upon proper submission of a claim for travel
expenses. Advances to employees for anticipated travel expenses may
be made under the circumstances hereinafter described as (1)
permanent travel advances and (2) temporary travel advances
except as provided in Section X.3. All travel advances must be
approved by the president or his or her designees for employees
of the institution, the director for employees of the school,
and the Chancellor for employees of the Board.

2. Permanent Travel Advances - When an employee has blanket travel
authorization, and is expected to travel the major portion of
each month, the employee may be placed upon permanent travel
status. Upon determination of the employee's estimated monthly
expenses, if such expenses exceed $100, the employee may be
provided with a single advance in an amount sufficient to cover
such expenses for one month, provided such amount may not exceed
the semi-monthly salary of the employee. Subsequent to the
initial advance, the employee shall submit appropriate claims
and be reimbursed as heretofore provided, with any unused
portion of the advance to be returned upon termination of the
employee's permanent travel status.

3. Temporary Travel Advances - When temporary travel is authorized
for an employee, the employee may receive an advance, provided a
request for the advance, including estimated expenses, is
submitted to the appropriate approving authority with the
request for written authorization for the travel, and is
approved. An amount equal to 80% of the estimated expenditures
will be allowed as an advance, however, no advance less than
$100 will be made. Students traveling under individual
authorizations or an employee traveling with a student or
students who is responsible for disbursing all funds for the
trip may be advanced 100% of the amount of the authorization.

4. Payroll Deduction Authorization - Each employee receiving a
permanent or temporary travel advance for the first time must
sign a payroll deduction authorization form which will allow the
State to recover the advance from any salary owed the employee
in the event of termination of employment or failure to submit a
travel claim. This deduction from payroll should be used as a
last resort only in the event all other efforts to collect the
advance have failed.

5. Expense Claim - Upon return, the employee should submit an
expense claim detailing his actual expenditures. This claim
should show the total expenses incurred. The advanced amount
should be subtracted from this total. A voucher should then be
prepared requesting the additional amount due the employee. No
advance should exceed actual expenses. If this does happen,
however, the excess should be returned by the employee to the
business office for deposit as a credit against the original
advance with proper distribution being made of the actual expenses incurred. In the latter instance, the expense account claim should be forwarded to the business office with notification to file it with the advance request.

X. Corporate Credit Cards for Travel

1. General - Individual institutions and/or the Board Office may arrange for corporate credit cards to assist with travel expenses.

2. Membership - Corporate credit cards are made available to designated employees, with the employees personally responsible to the card vendor for all amounts charged to the card.

3. Advances - Travel advances, permanent or temporary, shall not be issued to:
   a. any employee who is issued a corporate card, or
   b. any employee who is designated but chooses not to apply for a corporate card.
   c. any employee who has had his/her corporate card cancelled or was refused a card based on the vendor’s credit requirements.

Institutions may make individual exceptions to the above provisions when the circumstances are determined to warrant such exception.

4. Reimbursement - Reimbursement for travel expenses shall only be allowed for actual business expenses incurred, subject to the provisions of Section II, Item 6, and the maximum limitations shown on the Addendum.

5. Cancellations - The Tennessee Board of Regents and/or the card vendor may cancel an employee's corporate card at any time. In the event of cancellation of a corporate card, the Tennessee Board of Regents or appropriate institution shall promptly notify the employee of the cancellation and use its best efforts to obtain the canceled corporate card and return it to the card vendor.

6. Termination - The Tennessee Board of Regents and its institutions shall notify the card vendor if a cardholder’s employment is terminated, and the effective date of such action. Each institution shall establish procedures to collect corporate cards from terminated employees and return them to the
XI. Moving Expenses

1. Authorization

A. Payment of moving expenses must be approved in advance by the President or designee.

B. Approval of moving expenses may be made when considered in the interest of the institution and when such payment is a part of the employment negotiation with a new employee or the relocation of a current employee.

C. No moving expenses will be authorized or paid which would not qualify for a deduction under Section 217 - Moving Expenses - of the Internal Revenue Code.

D. Expenses and allowances as provided in these regulations shall not be allowed unless and until the employee agrees in writing to remain in the service of the institution for a period of twelve (12) months following the effective date of move, unless separated for reasons beyond his or her control and acceptable to the institution concerned. For faculty on an academic or modified fiscal year basis, the employment service shall be one regular academic year of two semesters or the normal work period associated with a modified fiscal year appointment. The service agreement statement should be maintained in the employee's personnel file. In case of a violation of such an agreement, including failure to effect the transfer, any funds expended by the institution for such expenses and allowances shall be recoverable from the employee concerned as a debt due the institution.

2. Expenses Subject to Payment/Reimbursement

A. Possible expenses subject to payment or reimbursement will be actual cost of moving household goods and personal effects, travel expenses directly associated with the movement of household goods and effects, and temporary storage of goods and effects.

B. The actual cost of moving goods and effects may include the cost of commercial moving companies, rental of moving vans/trucks and operating cost (gas) of these rentals, and the cost of packing/unpacking (including labor and materials). Moving and rental companies' insurance charges may be included.
C. Travel expenses directly associated with a move may include mileage of all owned vehicles and en route lodging.

Lodging may be covered for the employee and all immediate family members residing in the household. En route lodging may be provided for one night if the distance of the move is 400 miles or more, plus one additional night for each additional 400 miles. Lodging for one night at the destination may be permitted.

Lodging will be consistent with the Tennessee Board of Regents travel policy rates. Mileage will be reimbursed at the current IRS rate for moving mileage. Travel expenses incurred when moving from another state to Tennessee will be reimbursed at the out-of-state rates.

For the purpose of these regulations, immediate family is defined as any of the following named members of the employee's household at the time he/she reports for duty at his/her new official station: spouse, children (including step-children, adopted children, or foster children) unmarried and under 21 years of age or physically or mentally incapable of supporting themselves regardless of age, or dependent parents of the employee and the employee's spouse.

D. If two or more members of an immediate family otherwise qualify for reimbursement or allowances under these regulations as Tennessee Board of Regents employees, only one member shall be eligible for employee reimbursement or allowances; the other is eligible for reimbursement as a family member.

E. Storage of household goods and personal effects may be allowed for a period of 30 consecutive days.

3. Arranging for Moving and Payment

A. If the total moving expense authorized exceeds $5,000 and if the institution agrees to pay all of the cost of a commercial mover, the institution must arrange for the mover through normal purchasing procedures. The vendor should be paid directly by the institution.

B. In all other cases, the institution may require, at its option, that arrangements be made through its purchasing department or the employee may make the arrangements and seek reimbursement.
C. Only arrangements made directly by the institution will be reimbursed directly to vendors by the institution. In other cases the institution should reimburse the employee. Claims for reimbursement must be supported by an invoice.

4. Other Provisions

A. Moving expenses will be paid or reimbursed only after a contract is executed between the employee and the institution. See Attachment A.

B. All travel and travel expenses shall be accomplished as soon as possible, but in no event shall the effective date of the move to the completion of travel and transportation exceed twelve (12) months unless written extension is granted by the President/Director of the institution/school. All payments or reimbursements must be made within twelve (12) months of the date employment begins for new employees or relocation occurs for relocated employees.

C. The agreement on the amount of moving expenses to be paid, the type expenses to be paid, responsibility for arranging logistics, etc., should be clearly understood in writing between the employee and the institution.

D. The institution shall assume no liability whatsoever for personal injuries, property damages, or other losses which may be sustained in connection with any moves undertaken pursuant to these regulations.

XII. IMMIGRATION EXPENSE ALLOWANCE

1. New employees may receive reimbursement for immigration expenses when considered to be in the interest of the institution and when such payment is a part of the employment negotiation with a new employee or the relocation of a current employee from another employer or institution. Reimbursement/fee allowance for immigration fees must be approved in advance by the Director or President or his/her designee.

2. This provision applies only to candidates who are required to pay immigration fees to work and live in the U.S. No employee may receive reimbursement more than once.

3. No payment shall be made unless the employee agrees in writing to remain in the service of the institution for a period of twenty-four (24) months following the effective date his/her
employment agreement, unless separated for reasons beyond his/her control and acceptable to the institution. The service agreement statement should be maintained in the employee’s personnel file. In case of a violation of such an agreement, any funds expended by the institution for such allowance shall be recoverable from the employee as a debt due the institution in the same manner as educational allowance payments. (See Attachment B)

4. Reimbursement shall be in the maximum amount of $4500 and shall not exceed the employee’s actual, documented expenses. The allowance cannot be used to defray non-immigration-related costs or any costs not associated with the individual employee’s immigration expenses.

5. Reimbursable fees include: fees charged by a licensed immigration attorney retained in connection with the application, filing, permanent residence fee, fee for any application to enter the U.S., fee for application to remain in the U.S., and associated fees required in the application process, such as medical examinations, fingerprinting, photo identification, postal/courier fees, and costs of evaluating foreign academic credentials or translations of foreign documents.

6. The employee is responsible for making arrangements for representation, completion of paperwork, assistance in the immigration process, and submission of all bills and/or invoices for which reimbursement is sought. Faculty may submit a claim for reimbursement by sending a request with original receipts to the Chief Academic Officer.

XIII. Exceptions

General - The Chancellor shall have the authority to grant exceptions to any part or all of the provisions of this policy when deemed appropriate and necessary; however, any exception directly affecting the Chancellor must be approved by the Vice Chair of the Board. The Chancellor delegates to the presidents and directors the authority to grant exceptions to any part or all of the provisions of this policy in individual instances when deemed appropriate and necessary; however, any exception directly affecting presidents or directors must be approved by the Chancellor or Vice Chancellor for Technology Centers, respectively. Two areas of standing exceptions to the policy are provided below.

Exception No. 1

(a) Provisions for travel contained in this Exception Number One
shall be applicable only to the Chancellor and his or her immediate staff, presidents of institutions, technology center directors, and System employees traveling in their company. This exception corresponds with Exception Number Three of the Comprehensive Travel Regulations. All provisions of the Sections II through X of this policy shall be applicable unless superseded by the following.

(b) **Transportation:** First class travel on common carrier shall be allowable at the option of the above designated persons when accompanying others not employed by the State who are traveling in first class accommodations.

(c) Charges for automobile rental shall be allowed whenever it is more economical than alternative methods of transportation or whenever it is the only practical means of transportation.

(d) **Lodging:**

1. **In-State and Out-of-State Lodging** - Reimbursement for actual expenses for in-state and out-of-state lodging will be allowed, subject to the maximum rate shown on the Addendum.

2. When employees share a hotel room, each employee should claim a proportionate share of the room cost, and include an explanation with his or her travel claim detailing dates and other employees with whom the room was shared.

3. If a room is shared with other than a state employee, actual cost subject to the maximum above will be allowed. The receipt for the entire amount should be submitted with the expense account.

(e) **Meals:**

1. **In-State and Out-of-State Meals** - A per day meal allowance is shown on the Addendum. For fractional days in travel status, the allowance will be prorated.

2. Expenses for group breakfasts, luncheons and dinners, occasioned by meetings of long duration or by circumstances where it is more feasible to provide such meals than to recess the meeting, may be allowed.

3. Expenses for meals for employees occasioned by meetings called by the appropriate approving authority are allowed subject to the daily meal allowances indicated (see section VI. Meals).

4. Reimbursement of actual expenses for meals and related...
costs shall be allowable when acting as host to guests of the institution or other official business functions provided the purpose and the event are shown on a separate reimbursable expense statement. Receipts or other satisfactory evidence of payment must be attached to the claim. The above designated persons may delegate the authority granted under this item to members of their staff provided such delegation is in writing. All reimbursement claimed under this authority shall be clearly identified and a special report submitted with each reimbursement request.

Exception No. 2

(a) Members of the Tennessee Board of Regents shall be reimbursed for travel in the performance of their official duties in accordance with applicable provisions of the general policy unless superseded by the following, which corresponds with Exception Number Four of the Comprehensive Travel Regulations, provided that necessary approvals shall be made by the Chancellor rather than the Commissioner of Finance and Administration.

(b) Members of the Board shall be reimbursed by the Board office for all allowable travel expenses upon submission of a standard form for claims and appropriate receipts.

(c) **Lodging:**

1. Lodging for both in-state and out-of-state will be allowed up to the maximum indicated (see Addendum).

2. Higher rates for lodging at the location of a convention or conference will be allowed, without special approval, up to the amount indicated in the convention or conference brochure. If more than one rate is indicated, the lowest rate is the amount which will be reimbursed. However, a Board member should attempt to receive a government rate for the lodging. If the lowest rate indicated in the convention or conference brochure is unavailable, written advance approval of the higher rate must be obtained from the Chancellor. The convention or conference brochure which indicates the lodging rates must be included with the travel claim. Otherwise, reimbursement will be limited to the applicable lodging rate as provided in these regulations.

(d) **Meals:**
1. A daily meal allowance will be provided for in-state and out-of-state travel. For fractional days in travel status, the allowance will be prorated (see section VI. Meals); provided further, that a noon meal may be claimed without incurring overnight travel and without the requirements for eligibility for the evening meal.

2. Expenses for group breakfasts, luncheons and dinners, occasioned by meetings of long duration or by circumstances where it is more feasible to provide such meals than to recess the meeting, may be allowed, provided written advance approval is secured from the Chancellor, except where advance approval is not practicable.

Addendum
Tennessee Board of Regents General Travel Policy

This Addendum provides the specific expenses considerations cited in the general travel policy. The reimbursement rates listed below are consistent with the current Comprehensive Travel Regulations of the State of Tennessee, which may be revised from time to time. The following shall remain in effect from and after December 2, 2005, until revised by the Chancellor.

**General Reimbursement Rates**

<table>
<thead>
<tr>
<th>Standard mileage rate</th>
<th>Rate approved by the Dept. of Finance and Administration (see <a href="http://www.state.tn.us/finance/acct/policy8.pdf">http://www.state.tn.us/finance/acct/policy8.pdf</a>)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum parking fees without receipt</td>
<td>$ 8.00 per day</td>
</tr>
<tr>
<td>Fees for handling of equipment or promotional materials</td>
<td>$ 20.00 per hotel</td>
</tr>
</tbody>
</table>

**Out-of-State Reimbursement Rates**

Employees are to utilize the U.S. General Services Administration CONUS (Continental United States) rates provided by the federal government. The CONUS rates are located on the U.S. Government’s web page at [http://www.gsa.gov/](http://www.gsa.gov/)

Use the CONUS standard rates for all locations within the continental United States not specifically shown on the web page as a listed point.

**In-State Travel Reimbursement Rates**

**Level I Counties and Cities**

<table>
<thead>
<tr>
<th>Day of Departure And Return</th>
<th>Maximum Lodging</th>
<th>Maximum Meals and Incidentals</th>
</tr>
</thead>
<tbody>
<tr>
<td>75% of M&amp;I</td>
<td>$75.00 + tax</td>
<td>$38.00</td>
</tr>
</tbody>
</table>

Shelby County, Davidson County, Knox County, Hamilton County, Gatlinburg, Pigeon Forge, Sullivan County, Johnson City, Williamson County. (Includes Paris Landing, Montgomery Bell, Natchez Trace, Pickwick, Fall Creek Falls, and Henry Horton State Parks)

**Level II Counties and Cities**

<table>
<thead>
<tr>
<th>Day of Departure And Return</th>
<th>Maximum Lodging</th>
<th>Maximum Meals and Incidentals</th>
</tr>
</thead>
<tbody>
<tr>
<td>75% of M&amp;I</td>
<td>$65.00 + tax</td>
<td>$31.00</td>
</tr>
</tbody>
</table>

All other counties and cities not listed above.
## Standard Out-of-Country Rates

<table>
<thead>
<tr>
<th>Day of Departure And Return</th>
<th>Maximum Lodging</th>
<th>Maximum Meals and Incidentals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual expense or 75% of M&amp;I</td>
<td>Actual expense</td>
<td>Actual expense or $64.00</td>
</tr>
</tbody>
</table>

(per diem amount only to be used when receipts are not available)
Special Rates Under Exception One

This exception applies to the Tennessee Board of Regents' Chancellor and his or her immediate staff, presidents of institutions, area school directors, and System employees traveling in their company. This exception rate schedule corresponds with Exception Number Three of the Comprehensive Travel Regulations of the State of Tennessee.

Out-Of State Reimbursement Rates

Employees are to utilize the U.S. General Services Administration CONUS (Continental United States) rates provided by the federal government. The CONUS rates are located on the U.S. Government’s web page at: http://www.gsa.gov/

Use the CONUS standard rates for all locations within the continental United States not specifically shown on the web page as a listed point.

In-State Travel Reimbursement Rate

Level I Counties and Cities

<table>
<thead>
<tr>
<th>Day of Departure And Return</th>
<th>Maximum Lodging</th>
<th>Maximum Meals and Incidents</th>
</tr>
</thead>
<tbody>
<tr>
<td>75% of M&amp;I</td>
<td>$80.00 + tax</td>
<td>$38.00</td>
</tr>
</tbody>
</table>

Shelby County, Davidson County, Knox County, Hamilton County, Gatlinburg, Pigeon Forge, Sullivan County, Johnson City, Williamson County. (Includes Paris Landing, Montgomery Bell, Natchez Trace, Pickwick, Fall Creek Falls, and Henry Horton State Parks)

Level II Counties and Cities

<table>
<thead>
<tr>
<th>Day of Departure And Return</th>
<th>Maximum Lodging</th>
<th>Maximum Meals and Incidents</th>
</tr>
</thead>
<tbody>
<tr>
<td>75% of M&amp;I</td>
<td>$70.00 + tax</td>
<td>$31.00</td>
</tr>
</tbody>
</table>

All other counties and cities not listed above.

Special Rates Under Exception Two

This exception applies to Board Members of the Tennessee Board of Regents who are reimbursed for travel in the performance of their official duties. This exception rate schedule corresponds with Exception Number Four of the Comprehensive Travel Regulations of the State of Tennessee.

Out-of State Reimbursement Rates
Employees are to utilize the U.S. General Services Administration CONUS (Continental United States) rates provided by the federal government. The CONUS rates are located on the U.S. Government’s web page at http://www.gsa.gov/

Use the CONUS standard rates for all locations within the Continental United States not specifically shown on the web page as a listed point.

**In-State Travel Reimbursement Rates**

**Level I Counties and Cities**

<table>
<thead>
<tr>
<th>Day of Departure And Return</th>
<th>Maximum Lodging</th>
<th>Maximum Meals and Incidentals</th>
</tr>
</thead>
<tbody>
<tr>
<td>75% of M&amp;I</td>
<td>$95.00 + tax</td>
<td>$38.00</td>
</tr>
</tbody>
</table>

Shelby County, Davidson County, Knox County, Hamilton County, Gatlinburg, Pigeon Forge, Sullivan County, Johnson City, Williamson County. (Includes Paris Landing, Montgomery Bell, Natchez Trace, Pickwick, Fall Creek Falls, and Henry Horton State Parks)

**Level II Counties and Cities**

<table>
<thead>
<tr>
<th>Day of Departure And Return</th>
<th>Maximum Lodging</th>
<th>Maximum Meals and Incidentals</th>
</tr>
</thead>
<tbody>
<tr>
<td>75% of M&amp;I</td>
<td>$85.00 + tax</td>
<td>$31.00</td>
</tr>
</tbody>
</table>

All other counties and cities not listed above.
Attachment A

TENNESSEE BOARD OF REGENTS
MOVING EXPENSE AGREEMENT

Agreement made on _____(Date____) between ___(Institution/School)____ (referred to as the Institution), and _____(Employee's Full Name)____ (referred to as the Employee),

WITNESS:

WHEREAS, the Employee, with employment date effective (Employment Date)___ desires to move and relocate his/her residence from ___(City and State)____ to _____(City and State)____ and the Institution desires to reimburse or pay on behalf of the Employee the cost of the moving expense, the parties therefore, agree as follows:

1. The Institution agrees to reimburse or pay on behalf of the Employee an amount not to exceed $_______________ for moving expenses incurred for the relocation. Of this amount, not more than $ ______________ can be reimbursed directly to the individual. All reimbursement claims must comply with the State Comptroller's rules and regulations in effect when this agreement is signed. Also, the Employee agrees to provide original receipts for all reimbursement claims.

2. In consideration for the Institution either reimbursing or paying the costs of moving, the employee agrees to remain employed by the Institution for a period of at least one year. For faculty appointed on an academic basis, one year is defined as one regular academic session (Fall and Spring semesters, nine months). For all other annual faculty and employees, one year is defined as twelve months. Should the employee leave employ prior to completion of that year, the Employee will be liable to the Institution for all moving expenses which the Institution has paid (to or on behalf of the Employee), together with reimbursements and all payroll taxes withheld by the Institution in connection with such expenses.

3. The Employee hereby gives the Institution an express lien on all salaries, wages, and other sums payable to him/her by the Institution, for the purpose of securing all amounts due under Section 2 above in the event the Employee leaves prior to one year's employment at the Institution. The Employee authorizes the Institution to withhold all amounts due under this Agreement from any sum payable to the Employee by the Institution.
4. If the Employee fails to remain employed as indicated in Section 2 above for reasons beyond his/her control considered sufficient by the Institution, all or part of the liability under Section 2 may be waived by the Institution. Any such waiver must be approved in writing by the Employee's department head or dean and the President/Director. (The dean/department head, whose account paid for the Employee's move, must notify Accounting Operations if the Employee does not remain employed at the Institution for at least one year.)

________________________________________
Employee (Signature)                              President/Director (Signature)

____________________________
Employee (Print or Type)                  President/Director (Print or Type)

Employee's Social Security No.

________________________________________
Assistant Comptroller for Accounting Operations

________________________________________
Account Number to be Charged

____________________________
Department Name

____________________________
Department Contact & Phone Number
ATTACHMENT B

TENNESSEE BOARD OF REGENTS

IMMIGRATION EXPENSE ALLOWANCE AGREEMENT

This Agreement is made on _____ (Date)______ between ___(Institution)_____ (referred to herein as “Institution”), and _____(Employee's Full Name)_____ (referred to herein as “Employee”),

WITNESS:

Employee, whose effective employment date is (Employment Date)___, desires to become employed at Institution and to have institution reimburse Employee for employment-related immigration expenses, and Institution desires to reimburse Employee for employment-related immigration expenses up to ____________ ($_______.00) dollars. The parties therefore agree as follows:

1. Institution agrees to reimburse Employee an amount up to ________.00. Employee’s reimbursement shall not exceed employee's actual costs. All reimbursement claims must comply with the guidelines and policies of the Tennessee Board of Regents system and the Tennessee Comptroller's rules and regulations.

2. Employee must provide Institution with original receipts for all expenses in order to receive reimbursement.

3. Only employees who are required to pay immigration fees to work and live in the U.S. are eligible for reimbursement. The allowance cannot be used to defray non-immigration-related costs or any cost(s) not associated with the individual employee’s immigration expenses.

4. Reimbursement shall not exceed Employee’s actual, documented expenses. No employee may receive reimbursement more than once.

5. Reimbursable fees include: fees charged by a licensed immigration attorney retained in connection with the application, filing, permanent residence fee, fee for and application to enter the U.S., fee for application to remain in the U.S., and associated fees required in the application process, such as medical examinations, fingerprinting, photo identification, postal/courier fees, and costs of evaluating foreign academic credentials or translations of foreign documents.

6. In consideration for the Institution reimbursing Employee for immigration expenses, the Employee agrees in writing to remain employed by the Institution for a period of twenty-four (24) months following the effective date of his/her employment agreement, unless separated for reasons beyond his/her control and acceptable to the institution. The service agreement statement should be maintained in the employee’s personnel file. In case of a violation of such an agreement, any funds expended by the institution for such allowance shall be recoverable from the employee as a debt due the institution in the same manner as educational allowance payments.

7. Employee hereby gives the Institution an express lien on all salaries, wages, and other sums payable to him/her by the Institution, for the purpose of securing all amounts due under Section 5 above if Employee leaves prior to the expiration of two year's employment at the Institution. In the event that Employee voluntarily leaves institution prior to the expiration of two years, Employee hereby expressly authorizes Institution to withhold all amounts due under this Agreement from any sum payable to Employee, the including Employee's final paychecks and, if sufficient funds are not available from Employee’s final paychecks, from Employee' s retirement.

8. If Employee fails to remain employed as indicated in Section 5 above for reasons beyond his/her control considered sufficient by the Institution, all or part of the liability under Section 5 may be waived by the Institution. Any such waiver must be approved in writing by the Employee's department head or dean and the President. (The dean/department head, whose account paid for the Employee's immigration expense, must notify Human Resources if the Employee does not remain employed at the Institution for at least two years.)

Employee Signature             Date                        President’s Signature                 Date
INSTRUCTIONS:

Submit this form in duplicate to the Purchasing and Business Services Department (all information must be complete and all signatures must be affixed, except that of the President, which will be obtained by Purchasing and Business Services). Attach the employment contract signed by the President that reflect immigration expenses have been approved (do not attach an Appointment Recommendation Form).

When this agreement has been fully executed, a copy will be returned to the Department by Purchasing and Business Services to process/attach a travel requisition. A copy will be also be forwarded to the Human Resources Department to be placed in the Employee's personnel file. The Employee may submit a travel claim after the immigration expense has been encumbered. All travel must be in compliance with TBR policy 4-03-03-00, http://www.tbr.state.tn.us/policies_guidelines/business_policies/4-03-03-00.htm.