

**PACIFIC STATES MARINE FISHERIES COMMISSION**  
**TRAVEL POLICY**

*Revised February 2011*

It is the policy of Pacific States Marine Fisheries Commission (PSMFC) to reimburse employees and to pay outside vendors for approved travel-related costs and activities. The Commission employs this organizational travel policy which applies regardless of the source of revenue used to pay for the travel. In doing so, it intends that the policy will conserve funds as well as fully satisfy the general tests of allowability and the specific section on allowability of travel costs contained in Office of Management and Budget Circular A-87(2CFR 225), and Appendix B. Paragraph 43.

PSMFC approved travel is generally defined as transportation on PSMFC business in excess of one's normal commute. Approved travel includes movements on official business from home or the primary work location to another destination, and return to home or the primary work location. PSMFC approved travel does not include the commute between the employee's home and his/her primary work location.

This policy applies to all programs, except when the funding agency guidelines are more restrictive than PSMFC policy and the funding agency rules apply.

Travel must be authorized and approved by an appropriate supervisor and a determination must be made that funds are available for such travel. Any travel outside the United States, Canada, or Mexico that is incurred using federal funds must be approved by the federal awarding agency. Each separate foreign trip must receive such approval.

Entertainment expenses are those for amusements, diversion and social activities which have no business purpose. They are distinct from business meeting expenses and business travel expenses, and will not be charged to federal government awards

**Responsibilities of the Traveler:**

- Be familiar with agency travel and transportation regulations before embarking on travel.
- Exercise the same care in incurring expenses and accomplishing the purpose of the travel that a prudent person would exercise if traveling on personal business.
- Pay any excess costs and additional expenses incurred for personal preference or convenience.
- Return as promptly as possible to either official station or official residence when official business is completed.
- Prepare and submit travel expense voucher (Concur) and provide appropriate receipts and documentation.
  - Appropriate receipts include:
    - Lodging – Detailed “Hotel” receipts.
    - Meals – If claiming per diem, none required.  
(If State of California funded project, actual costs and detailed receipts are required. Visa receipts are unacceptable.)
    - Airfare – Airline receipt required. Credit card receipts are not acceptable.
    - Car Rental – Detailed car rental agency receipt.
  - Documentation
    - Business purpose explanation must be detailed enough so supervisors, reviewers, auditors or other individuals unfamiliar with project can clearly

understand “why” the expense was necessary. Merely identifying the project number/name and type of expense is insufficient.

Responsibilities of the Supervisor:

- Ensure that travel costs are directly work related.
- All receipts are attached.
- Business purpose is clearly defined.

Air Travel:

- PSMFC Travelers are expected to use coach class unless other than coach class is authorized because coach class accommodations would:
  1. require circuitous travel;
  2. require travel during unreasonable hours;
  3. excessively prolong travel;
  4. result in additional costs that would offset the transportation savings; or
  5. offer accommodations not reasonably adequate for the traveler’s medical needs.

PSMFC traveler must document which of these conditions existed for first class airfare to be authorized.

- Travelers should book airline tickets 14 days in advance whenever possible.
- The traveler can be reimbursed for airline fees/charges incurred to change tickets if a trip is changed or cancelled because of PSMFC business needs or circumstances beyond the traveler’s control (e.g., conference/event cancellation or a business meeting concluded earlier than scheduled). Individuals will not be reimbursed for fees/penalties resulting from trip changes or cancellations for personal convenience.
- The traveler can be reimbursed for baggage claims for up to two pieces of luggage checked by the airline. Receipts are required for claims beyond \$25.
- Frequent flyer miles or credits earned by travelers on official business belong to the traveler. However, travelers may use their miles or credits to upgrade their accommodations or may use their own funds to pay for the incremental cost of upgrades.

Transportation to the Airport:

- Travelers are expected to use the most cost-effective mode of transportation from their home or work to and from the airport. Reimbursement for use of a privately owned vehicle (POV) for such transportation will be reimbursed at the current mileage rate recognized by the Internal Revenue Service (51 cents per mile for 2011). Airport parking of POV will be reimbursed at actual costs. Receipts are required.

Miscellaneous Transportation:

- If the traveler requires transportation (bus, taxi, subway, ferry, etc.) between airports, at a destination or related to overnight lodging, the actual and reasonable cost of such transportation will be reimbursed. Receipts must be obtained and provided for any fare that exceeds twenty-five dollars (\$25.00).

Car Rental:

- Travelers may be reimbursed for a rented vehicle and for the gasoline purchased for official business in that rented vehicle. Receipts are required.
- PSMFC standard rental vehicle is an intermediate or comparable vehicle. Any exception to this policy must be documented.

- PSMFC’s automobile insurance policy covers rental cars, and accordingly, insurance offered by the rental agency should be declined. If an insurance claim is necessary, the signed vehicle rental agreement must be filed with the Fiscal Department. When traveling out of the country, the collision damage waiver must be purchased.
- Only PSMFC employees are authorized to drive rental vehicles on PSMFC business.

Personal Vehicle:

- The use of a privately owned vehicle will be reimbursed at the lower of the current IRS standard mileage rate or as limited by a traveler’s program. The mileage rate is to cover all expenses incurred for using the privately owned vehicle. An individual who uses a privately owned vehicle on PSMFC business must meet the liability insurance requirements of the motor vehicle financial responsibility laws of their state.
  - Transportation costs for parking fees and tolls are reimbursable on an actual cost basis in addition to the standard mileage rate. Receipts must be obtained and provided for any individual expenses that exceed twenty-five dollars (\$25.00).
  - All other personal vehicle services (e.g. maintenance, car washing, detailing, oil changes, etc.) are not reimbursable.
  - Mileage may be reimbursed for travel to and from an employee’s temporary work location. In such circumstances, no adjustment is required for normal commuting mileage.

Lodging:

- Travelers on PSMFC business will be reimbursed actual lodging costs, at the current federal lodging per diem rate established by the General Services Administration for domestic travel and by the US State Department for any foreign travel. If the traveler is required to pay taxes, such as those imposed for occupancy, from which exemption cannot be claimed, such charges will be reimbursed on an actual basis in addition to the per diem rate. Itemized receipts are required for lodging reimbursement. The lodging facility must be at least fifty (50) miles from the traveler’s home or headquarters.
- Travelers will be reimbursed for documented business-related telephone, fax, copying, computer connections, and other necessary business costs. Non-business expenses including movies, games, laundry, dry cleaning, and other personal expenses will not be reimbursed.
- If a lodging facility requires prior financial commitment (e.g., prepayment for one night or credit card guarantee), the traveler is responsible for notifying the lodging facility of any cancellation. If he/she fails to provide notice of cancellation:
  - The traveler will not be reimbursed for the resulting penalty payment.
  - The traveler will be required to reimburse PSMFC for the resulting penalty if PSMFC funds were used for the prior financial commitment.
- Supporting documentation for conference, convention, or training session lodging expenses must include receipts and an official documents that indicates the lodging rate for the event site.

Exception:

- Any request for reimbursement of lodging expenses in excess of the federal lodging per diem must be documented in the reimbursement request.
- Such lodging expenses will be approved under the following conditions:
  - The traveler is required to attend a meeting, conference, convention, or training session where the traveler is expected to have business interaction with other participants in addition to scheduled events; and

- It is anticipated that the maximum benefit will be achieved by authorizing the traveler to stay at the lodging facility where the meeting, conference, convention, or training session is held.
- When travel is for PSMFC business other than to attend a meeting, conference, convention, or training session and lodging accommodations in the travel destination area are:
  - Not available at or below the federal lodging per diem; and
  - The savings achieved from occupying less expensive lodging at a more distant site are consumed by an increase in transportation and other costs.

#### Meals, Tips and Incidental Expenses:

##### Overnight Trips

- PSMFC will reimburse business travel meals at the federal per diem rate for that location. For overnight travel, meals are reimbursed at the rate in effect for the area where the traveler stops for sleep. The meal reimbursement for the last day of travel (return day) would continue to be the rate for the location where the traveler last stopped for sleep. The per diem allowance is intended to include incurrence of incidental expenses such as fees and tips for porters, baggage carriers, house-cleaning and bell staff.

##### Single Day Trips

- 12 hour rule: Business travel over 12 hours and in excess of 50 miles one-way distance from home or work location without an overnight stay (*i.e., day trips*) is eligible for reimbursement of meals. Reimbursement will be 75% of the per diem rate for meals and incidentals of destination location. The amount must be reduced by 25% for each meal provided by another entity (*i.e., one meal provided, reimbursements is 50%; two meals provided, reimbursement is 25%, three meals provided, reimbursement is zero*).  
(*Example: As of 1/1/2010 the standard domestic rate is \$46.00. Accordingly, the maximum day trip meal allowance is 75% or \$34.50.*)
- 10 hour rule: Business travel 10 and 12 hours and in excess of 50 miles one-way distance from home or work location without an overnight stay (*i.e., day trips*) is eligible for reimbursement of meals. Reimbursement will be 75% of the standard domestic per diem rate for meals and incidentals. The amount must be reduced by 25% for each meal provided by another entity (*i.e., one meal provided, reimbursements is 50%; two meals provided, reimbursement is 25%, three meals provided, reimbursement is zero*).  
(*Example: As of 1/1/2010 the standard domestic rate is \$46.00. Accordingly, the maximum day trip meal allowance is 75% or \$34.50.*)
- Reimbursement for alcoholic beverages will not be authorized from program funds as either direct or indirect costs.
- Reimbursement for meal expenses incurred within 50 miles of the traveler's official duty station, or over 50 miles but with less than 10 hours of business travel, is prohibited unless it is connected with the training, workshop or conference, or a meeting in which a business purpose is documented. Allowable reimbursements will be based on an actual cost basis as evidenced by itemized receipts up to a daily maximum of 40% of the standard domestic per diem rate for meals and incidentals. The dollar limit is rounded up to the next whole dollar amount.
- Reimbursement for meals at the official work location is generally not allowable for meetings between staff members of PSMFC or with other agencies unless the timing and duration of such meetings is such as to carry over into normal meal times and there is a demonstrated need to keep participants together for that period. (See section below – Refreshments and Meals at Official Meetings)

- No reimbursement will be made for a meal that is provided as part of a conference registration fee. Conference registration documentation must be submitted with the travel claim to identify meals included in the conference registration fee.
- Reimbursement will not be made to an employee for expense of meals or lodging provided by relatives or other parties.

Personal Travel:

- The traveler must separate and is responsible for any costs of personal travel that may be combined with business travel. PSMFC reserves the right to determine the fairness of the allocation of costs.

Travel Expenses Paid or Reimbursed by an Outside Entity:

- Employees are not allowed to receive travel expense reimbursement directly from outside sources for travel that occurs while on official PSMFC travel status. A copy of the request for reimbursement submitted to the outside entity must be provided to the PSMFC Fiscal Department at the time of submission. The travel claim must direct the outside entity to make payments directly to PSMFC.

Refreshments and Meal for Official Meetings:

- PSMFC recognizes the importance of sponsoring meetings and training sessions. Further, PSMFC understands that to facilitate the needs of the attendees and to ensure the best utilization of attendee time, refreshments and/or meals may be provided to those attending department sponsored meetings and/or training sessions under the following criteria:
  - Refreshments:
    - The meeting or training session has an agenda.
    - The meeting or training session has an intended duration of three (3) hours or more.
    - There are four (4) or more attendees.
  - Meals:
    - The meeting or training session has an agenda.
    - Location or scheduling conflicts do not lend themselves to a meal recess.
    - The meeting's is furthered by speeches, presentations or interpersonal exchange that would not normally occur on a daily basis.
    - The meeting or training session has a set intended duration that extends through a meal time period.
    - There are four (4) or more attendees.

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