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State of Louisiana
Department of Conservation and Energy
Fiscal Policy No. 5

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| **Issuing Agency** | Louisiana Department of Conservation and Energy (C&E) |
| **Policy Title** | Travel Procedures |
| **Policy Number** | Fiscal Policy No. 5 |
| **Effective Date** | July 2016 |
| **Revised Date** | September 2026 |
| **Applies To** | All unclassified and classified employees of the Louisiana Department of Conservation and Energy |
| **Approval** | Signed by: Mark Normand D53B03D7DF0140F... Undersecretary, Department of Conservation and Energy |

## I. POLICY

It is the policy of the Department of Conservation and Energy (C&E) that all job related travel be necessary to the mission and function of C&E, be conducted in the most cost efficient manner, and be in compliance with the Division of Administration's current State Travel Policy (PPM49).

All high cost travel expenses (i.e: airfare, hotel rooms, vehicle rentals and registrations) must be placed on a State-issued card (LaCarte Purchasing Card, State Corporate Travel Card, or the C&E Controlled Billed Account) unless prior approval has been granted from the Commissioner of Administration. Other travel related expenses will be paid by the employee (such as meals, tips and parking) and then be reimbursed through the LEO Travel Module, pursuant to PPM49.

This policy supplements PPM49; it does not repeat it. Travelers and approvers must comply with both. Where this policy is more restrictive than PPM49, this policy applies. Where PPM49 is more restrictive or addresses a subject this policy does not, PPM49 controls. Nothing in this policy authorizes an expense PPM49 prohibits or an amount above a PPM49 maximum.

## II. APPLICABILITY

This policy applies to all employees of C&E and C&E contractors.

## III. PROCEDURES

### A. Travel Authorizations (TA)

All travel, whether routine or non-routine, must have an approved TA prior to the travel date. The purpose of the trip must be stated in the space provided on the front of the TA form. C&E must maintain a file of all approved travel authorizations; electronic files and certified electronic signatures are acceptable.

#### 1. In-State Travel

a. Routine In-State Travel: An approved TA is required for all routine in-state travel. C&E may issue an annual (blanket) TA covering routine in-state travel where the C&E Secretary or his/her

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designee determines an annual authorization is in C&E's best interest. An annual TA covers routine travel only and may not be used for seminars, conferences, conventions, training, or out-of-state travel. The term "routine in-state travel", as defined by PPM49, is any travel required in the course of performing an employee's job duties within the borders of Louisiana or through adjacent states between points within Louisiana.

b. Non-Routine In-State Travel: Employees must have a TA approved in writing by the C&E Secretary or his/her designee, from whose funds the traveler is paid, for all non-routine in-state travel before the trip begins. The term "non-routine in-state travel", as defined by PPM49, is any seminar, conference, convention or training within the borders of Louisiana or through adjacent states between points within Louisiana. Blanket TAs for non-routine travel are not allowed. TAs should be completed far enough in advance so that C&E can take advantage of the lowest airfare and hotel rates.

**2. Out-of-State Travel**

Employees must have a TA approved in writing by the C&E Secretary or his/her designee for all out-of state travel before the trip begins. Blanket out-of-state TAs are not allowed. TAs should be completed far enough in advance so that C&E can take advantage of the lowest airfare and hotel rates.

**NOTE:** This rule does not apply to any out-of-state domiciled employee whose routine travel is required in the course of performing their job duties.

**3. Supplemental Information**

A memo should be attached to each TA. It should include the following detailed information:

a. How the travel directly links to or benefits the ongoing internal initiatives, projects, goals and the C&E mission.

b. A note whether a virtual option is available. If a virtual meeting is provided, provide detail on the benefits of attending in person.

c. If K-time is anticipated, list the approximate number of hours to be earned.

The C&E Secretary or his/her designee may require additional information or supporting documentation as necessary to evaluate the travel request. Employees must provide any requested information or documentation before the TA may be approved.

Additional information may include, but is not limited to:

a. How the employee became aware of the event or meeting.

b. If applicable, a list of stakeholders with whom the employee will meet.

c. Conference-Specific Travel

i. If applicable, employee is to include the professional certification type and whether the conference is necessary to satisfy continuing education requirements.

ii. If speaking or presenting at a conference, provide the topic of interest, any talking points, a copy of the conference agenda along with any power point or other presentation the employee plans to present.

iii. An explanation of how the presentation/topic aligns with the governor's agenda, mission and philosophy for the state.

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The appointing authority may request that employees, upon their return, provide a summary of the benefits or goals achieved during their travel. Additionally, the appointing authority may request a copy of a certificate of completion from any attended conference or training.

**B. Funds for Travel Expenses**

1. Persons traveling on official business will provide themselves with sufficient funds for all routine travel expenses not covered by a State-issued card.
2. Controlled Billed Account (CBA) is a ghost credit card account issued in an agency's name and paid by the agency. CBAs are to be used for airfare, registration, rental cars, prepaid shuttle charges, lodging and any allowable lodging associated charges such as parking and internet charges.

**C. Methods of Transportation**

The most cost-effective method of transportation that will accomplish the purpose of the travel shall be selected. Among the factors to be considered should be length of travel time, employee's salary (including K-Time/Overtime cost), cost of operation of a vehicle, cost and availability of common carrier services, etc.

For official in-state travel, travelers must use the following options in order: first, a state vehicle when available; second, a rental from the State's contracts (Enterprise, National, or Hertz) for travel over 99 miles; third, a personal vehicle with prior approval from the C&E Secretary, reimbursed at the published GSA mileage rate.

**1. Commercial Airlines (Receipts Required)**

All state travelers are to purchase the best value commercial airline ticket through the state contracted travel agency. Travelers are to seek airfare allowing a sufficient amount of lead-time prior to the departure date. The lead-time should be no less than ten (10) to fourteen (14) days in advance of travel dates to ensure the lowest fares are available. Please note that the cost of a preferred, or premium, seat is not reimbursable.

a. A lost airline ticket is the responsibility of the employee to whom the ticket was issued. The airline fee of searching and refunding lost tickets will be charged to the traveler. The difference between the prepaid amount and the amount refunded by the airlines must be paid by the employee.

b. Tickets which are unused by a traveler will be monitored by the C&E Travel Administrator. Upon notification of an unused ticket, the C&E Travel Administrator will notify the appropriate Executive Director to confirm that the ticket will be used before it expires. In addition, the C&E Secretary will be notified three months prior to expiration of all unused tickets. The C&E Secretary will determine whether the traveler must reimburse C&E. Additionally, the traveler will monitor unused tickets every 30 days to determine if they will be utilized. If it is determined that the ticket will not be utilized prior to expiration and there is the possibility to transfer the ticket, the traveler must immediately advise the C&E Travel Administrator that the ticket is available for use. The C&E Travel Administrator should then act accordingly.

**2. Motor Vehicle**

No vehicle may be operated in violation of state or local laws. No traveler may operate a vehicle without having in his/her possession a valid U.S. driver's license. Safety restraints shall be used by the driver and passengers of vehicles. All accidents, major and minor, shall be reported first to the local police department or appropriate law enforcement agency. In addition, an accident report form, available from the Division of Administration's Office of Risk Management (ORM), shall be completed as soon as possible and must be returned to ORM, with a copy to the C&E Fiscal – Administrative

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Services Fleet Manager within 24 hours, together with names and addresses of principals and witnesses.

Operating a state-owned vehicle, state-rented vehicle or state leased vehicle or operating a non-state owned vehicle for business while intoxicated as set forth in R.S. 14:98 and 14:98.1 is strictly prohibited, unauthorized, and expressly violates the terms and conditions of use of said vehicle.

Personal use of a state-owned, state-rented or state-leased vehicle is not permitted.

No person may be authorized to operate or travel in a state owned or rental vehicle unless that person is a classified or unclassified employee of the State of Louisiana; any duly appointed member of a state board, commission, or advisory council; or any other person who has received specific approval, and is deemed as an authorized traveler. A file must be kept containing all of these approvals.

Any persons who are not official state employees must sign the Office of Risk Management's Hold Harmless For Use Of, or Transport In, State Vehicles form prior to riding in or driving a state-owned vehicle or rental vehicle on behalf of the State. A file must be kept containing all of these approvals.

Students not employed by the State shall not be authorized to drive state-owned or rented vehicles for use on official state business. A student may be deemed as an "authorized traveler" on behalf of the State by the C&E Secretary or his/her designee. An authorized traveler can be reimbursed for their travel expenses. The Hold Harmless For Use Of, or Transport In, State Vehicles form acknowledging the fact that the state assumes no liability for any loss, injury, or death resulting from said travel must be signed as part of the approval process. A file must be kept containing all of these approvals.

Persons operating a state owned, rental, or personal vehicle on official state business will be completely responsible for all traffic, driving and parking violations received. This does not include state-owned or rental vehicle violations, i.e. inspection sticker, as the State and/or rental company would be liable for any cost associated with these types of violations.

All traffic accidents, citations or arrests for any moving violation when occurring in a vehicle owned, leased or rented by C&E or while operating a personal vehicle on C&E business must be reported to the appointing authority pursuant to C&E Human Resources Policy No. 9. - Vehicle Operations and Monitoring.

**a. State-Owned Vehicle**

Travelers in state-owned automobiles who purchase needed fuel, repairs and equipment while on travel status shall make use of all fleet discount allowances and state bulk purchasing contracts where applicable. Reimbursements require a receipt and only the lowest manufacturer recommended fuel should be used. If the traveler utilizes anything other than the lowest manufacturer recommended fuel, without justification and prior approval from the C&E Secretary, the traveler must reimburse the agency the difference between what was paid and the state average gasoline rate.

If a state-owned vehicle is to be used to travel to a destination more than 500 miles from its usual location, documentation that this is the most cost-effective means of travel should be readily available in the department's travel reimbursement files.

State-owned vehicles may be used for out-of-state travel only if permission by the C&E Secretary has been given prior to departure. When the use of a state-owned vehicle has been approved by the C&E Secretary for out-of-state travel for the traveler's convenience; the traveler is personally responsible for any other expense in-route to and from their destination, which is inclusive of meals and lodging.

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Employees traveling out-of-state with a State-owned vehicle must notify C&E Fiscal – Administrative Services Fleet Manager prior to departure so that the Fueltrac card can be modified to allow for out-of-state fuel purchases.

**b. Rented Motor Vehicles (Receipts Required)**

The state has mandatory vehicle rental contracts for both in-state and out-of-state travel with Enterprise, National, and Hertz.

Only the lowest manufacturer recommended fuel should be used. If the traveler utilizes anything other than the lowest manufacturer recommended fuel, without justification and prior approval from the C&E Secretary, the traveler must reimburse the agency the difference between what was paid and the state average gasoline rate.

Employees traveling out-of-state with a rented vehicle, who have been assigned a Fueltrac card, must notify the C&E Fiscal – Administrative Services Fleet Manager prior to departure so that the Fueltrac card can be modified to allow for out-of-state fuel purchases.

Liability of costs for lost keys or door unlocking services will be placed on the traveler.

**c. Personal Vehicle (Map Required)**

Employees may use their personal vehicle, with prior approval from the C&E Secretary, to travel on behalf of C&E and receive a mileage reimbursement at the published GSA mileage rate. A contract rental vehicle must be used for travel over 99 miles unless the C&E Secretary grants prior approval to use a personal vehicle and be reimbursed beyond 99 miles.

## D. Lodging

The State has created a voluntary hotel reservation contract with HotelPlanner to assist with bookings. Lodging rates for the 48 contiguous states are based on the GSA lodging rates for the applicable location. The GSA lodging rates can be found at https://www.gsa.gov/travel/plan-book/per-diem-rates.

The C&E Secretary or his/her designee may approve routine lodging above the published rate on a case-by-case basis, up to 50% over the applicable rate, or up to 75% over in an area where the Governor has declared an emergency. Receipts and written justification must be kept in the file. Overages beyond these limits require prior approval from the Commissioner of Administration; without it, the traveler must repay the overage.

Employees should always use the C&E Tax Exempt form for all in-state lodging. Travelers are responsible for reimbursing C&E for any Louisiana sales tax charged because the form was not presented at check-in at the hotel.

## E. Meals

Meals and incidental rates are based on the GSA meal rates for the 48 contiguous states. The GSA meal and incidental rates can be found at https://www.gsa.gov/travel/plan-book/per-diem-rates.

Meal rates include taxes and tips, travelers cannot be reimbursed separately for those items. Receipts are not required for meals within these rates unless a cash advance was received.

Declared Emergency Meals. Under PPM49 Addendum #01 and La. R.S. 39:231, M&IE may be reimbursed up to 75% above the applicable GSA rate for employees deployed in direct response to a gubernatorially declared emergency or disaster, within the designated emergency area or any area to which state personnel are deployed, and only during the declaration period (including authorized extensions) or thirty (30) days after the declaration, whichever occurs first. For each claim, C&E must document the declaration

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number, the employee name, the travel dates, the applicable GSA rate and amount reimbursed per day, and a justification showing the employee performed duties directly related to the emergency. Fiscal Services shall submit this documentation to StateTravel@LA.Gov within sixty (60) days after the declared emergency terminates.

**F. Other Expenses**

**1. Parking (Receipts Required)**

a. Airport Parking

The State has contracted rates for the indoor parking garage and outside fenced parking lot at the Baton Rouge airport, published in the resource section of the Office of State Travel's website. In order to receive the contract price at the Baton Rouge airport, the traveler must give the attendant the airport certificate and show their State ID.

At the New Orleans airport, parking in the Surface Lot or the Airline Economy Garage is reimbursable with a receipt at the rates published in the resource section of the Office of State Travel's website.

Travelers using motor vehicles on official state business may be reimbursed for all other parking, including airport parking except as listed above, ferry fares, and road or bridge tolls. A receipt is required for each transaction over $5.00.

b. Hotel Parking

Valet and other hotel parking is reimbursable, with a receipt required for each transaction over $5.00. Parking charges may be paid using the LaCarte Purchasing Card, the State Corporate Travel Card, or the C&E CBA account when such charges are included as part of an itemized hotel lodging invoice.

**2. Communication Expenses**

Travelers with a state issued phone or receiving a monthly stipend are not allowed communication reimbursements for domestic travel. State business communication costs may be reimbursed with receipts. Internet access charges for official state business from hotels or other travel locations are reimbursable with receipts.

**3. Luggage Allowances (Receipt Required)**

Airline travelers may be reimbursed for one checked bag for a business trip of 5 days or less and for two checked bags for a business trip exceeding 5 days. Additional luggage or equipment required for the business travel may be reimbursed with justification and receipts.

**4. Public Ground Transportation (Receipts Required)**

The cost of public ground transportation, such as buses, subways, airport shuttle and taxis, are reimbursable when the expenses are incurred as part of approved travel. If utilizing Uber or Lyft type services, only a standard size vehicle is reimbursable with an itemized receipt. Premium tiers (for example Uber Black or Lyft Lux) are not reimbursable. Reimbursement for a driver tip is limited to 20% of the total charge and must be shown on the receipt. All transportation, where receipts are not possible, are limited to $10/day for reimbursement.

**G. International Travel**

International travel and travel to U.S. Territories (Puerto Rico, the U.S. Virgin Islands, American Samoa, Guam, and Saipan) must be approved by the Commissioner of Administration prior to departure. Request for international travel must be accompanied by a detailed account of expected expenditures.

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International travelers will be reimbursed based on the U.S. Department of State per diem rates for meals and lodging.

**H. Claims for Reimbursement**

1. All travel reimbursement claims shall be entered into the LEO Travel Module by either the traveler, or their travel coordinator.
2. The completed reimbursement claim shall be approved in LEO or signed by the traveler and forwarded, with all necessary receipts and approvals, to their immediate supervisor (at a minimum) for approval.
3. Once the reimbursement claim has been approved, it will be submitted to Fiscal Services for final review/approval. Upon receipt of complete travel documentation, travel reimbursements will be processed.
4. Travelers should submit reimbursement claims within thirty (30) days of their return date. If a travel reimbursement is less than $25, it is recommended that the traveler wait until a minimum of $25 is reimbursable before submitting the request, unless no future travel is scheduled. Fiscal Services will review travel reimbursements to verify the documentation and complete processing within thirty (30) days of receiving the final reimbursement submission.

**I. Emergency Procedures**

1. If there are changes that arise after travel has begun that will not change the trip cost, the traveler shall contact a supervisor and forward their updated itinerary to their CBA Accountholder upon return from travel.
2. If there are changes that arise after travel has begun that will increase the cost of the trip, the traveler shall notify their supervisor and, by the close of the next business day, their CBA Accountholder. CBA charges can only be modified by the CBA Accountholder. If unable to contact their CBA Accountholder at the time of the travel change, travelers should use personal funds to pay for increases in travel costs.

   The CBA Accountholder is to contact the vendor to request that the additional travel expenses be transferred from the traveler's credit card to the CBA account. If the vendor is unable to transfer the expenses, the CBA Accountholder is to contact the C&E Travel Administrator for further instructions.

## IV. EXCEPTIONS

There are no exceptions to this policy without the express written approval of the Undersecretary. An exception cannot authorize an expense above a PPM49 maximum; waiver of a PPM49 provision requires prior written approval of the Commissioner of Administration.

## V. QUESTIONS

Questions regarding this policy should be addressed to the Fiscal Administrator.

## VI. REVISION HISTORY:

| Date | Action |
|---|---|
| July 2016 | Policy Established |
| August 2019 | Policy Revised |
| July 2020 | Policy Revised |
| February 2022 | Policy Revised |
| June 2024 | Policy Revised |
| August 2026 | Policy Revised |

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| September 2026 | Policy Revised |