**24c. CONSULTANT TRAVEL PROCEDURES**

Updated 9/30/2018

A USSEC Project Manager (PM) notifies the St. Louis office of an upcoming consultant visit by the submission of an ADVANCE NOTIFICATION FOR CONSULTANT (ADNOT) via email to the USSEC ADNOT box - ADNOTS@ussec.org. Please complete one ADNOT per consultant. ADNOT template is located **Q** **or X:\Projects\Resources\Templates & Forms\ADNOT Templates**. The ADNOT must be received in the USSEC St. Louis office at least **50 calendar days** in advance of the traveler’s departure date. Work will not begin on the trip until a **fully completed ADNOT** is received. Upon receipt of a completed ADNOT, the Logistic Specialist (LS) team member will confirm receipt to the proper project manager and will file a copy in the **Q: \Marketing\Program Assistant\ADNOT received calendar year**.

The LS reviews the ADNOT. All pertinent information must be included. If there is missing or confusing information in the ADNOT, it will be rejected and returned for completion. The revised ADNOT should be emailed to ADNOTS@ussec.org. Upon receipt of the revised, completed ADNOT, the Logistic Specialist (LS) team member will confirm receipt to the proper project manager (with a copy to the Marketing Assistant) and will file a copy in the **Q: \Marketing\Program Assistant\ADNOT received calendar year**.

The LS will follow up with Contracts Department and the PM to inquire about the status of the signed contract. **Please note that NO TRAVEL ARRANGEMENTS CAN BE MADE UNTIL THE CONTRACT IS SIGNED BY THE CONSULTANT.**

**USSEC Country Office (region) Responsibilities:**

Country Office (region) arranges “Letter of Invitation” for visa, if applicable.

County office will make the intra-country airline flights, if applicable.

Country Office (region) arranges ground transportation and lodging for consultant while in country. This information should be forwarded to the Logistic Specialist.

Country Office (region) sends someone to meet the consultant at the airport upon arrival or provides arrival instructions and provides arrival instructions, escort and support for the consultant while in-country.

**USSEC St. Louis Office Responsibilities:**

Set up an activity file folder with the consultant’s name, project number, destination and travel dates labeled on the folder tab utilizing the consultant log sheet located at **Q: \Marketing\Forms\Consultant Log Sheet.** Any correspondence or information relative to the activity is to be kept in this folder. Logistic Specialist are responsible for maintaining all information relating to each consultant.

Once the LS receives noticed that the contract is signed, a Travel Authorization Form can be filled out and approved according to USSEC’s Delegation of Authority Matrix. A travel authorization number will be assigned.

The LS will call or email the USSEC Consultant in order to determine if he/she would like USSEC to reserve the flight arrangements. When possible, USSEC would like all travel arrangements to be handled by the home office (St. Louis) team. If the LS will be handling travel arrangements, prompt return of the Consultant’s departure city and any other relevant necessary information to make their travel arrangements is necessary. Information requested will include: Traveler’s full name, date of birth, carrier preference, seat preference, and frequent flyer information.

If the Consultant prefers to handle his/her own travel arrangements, the Project Manager is required to approve this request. An email will be sent with instructions on how to contact American Express travel, the steps involved in booking travel and all pertinent information required to book travel (project number and travel authorization number). A copy of the itinerary should be forwarded to the LS for compliance purposes. Once approved, the consultant may proceed with issuing the electronic ticket.

The American Express agent emails the itinerary/invoice to travel@ussec.org & LS.

**Guidelines:**

* Domestic travel must be purchased **14 calendar** days prior to the traveler’s departure date.
* International travel must be purchased **30 calendar** days prior to the traveler’s departure date.
* If tickets are not purchased within these guidelines a 14/**30 calendar day** Exception Memo of Justification is required prior to purchase which is located at Q:\Projects\Resources\Templates&Forms\Exception Memo Templates and approved according to USSEC’s Delegation of Authority Matrix. The traveler is responsible for his/her memo. A ticket may not be purchased prior to receiving approval.
	+ For Domestic Airline travel purchases, an exception memo can be authorized on days 7 – 13. Airline tickets that are purchased 1-6 days prior to travel are not compliant and will not be reimbursed by USSEC as this would be considered a non-compliant expense to our funding partners.
	+ For International Airline travel purchases, an exception memo can be authorized on days 14 – 29. Airline tickets that are purchased 1- 13 days prior to travel are not compliant and will not be reimbursed by USSEC as this would be considered a non-compliant expense to our funding partners.
* A traveler should never be booked in First Class unless it is a complimentary upgrade which must be noted on the invoice. Always book airfare according to restrictions imposed by the funding source.

**Funding Sources**:

**USB** funded travel allows business class if scheduled travel time including up to two hours of layover exceeds eight hours. Flights on foreign air carriers are allowed if flights on an American Flag carrier are cost prohibitive. Restricted to lowest economy cost for travel less than eight hours.

**FMD** funded travel allows business class if scheduled travel time includes up to four hours of layover exceeds 14 hours and the origin and/or destination are outside the US. US travel is not permitted. All flights must be on an American or European Flag carrier for flights that begin and end in the US. Restricted to non-refundable economy cost for international travel of 14 hours or less. U.S. travel is permitted for teams.

 **MAP** funded travel must be on an American Flag carrier or European Flag Carrier when the flights begin and/or end in the U.S.  MAP funded travel is restricted to coach class unless the scheduled travel exceeds 14 hours beginning with the scheduled departure time, ending with the scheduled arrival time (maximum four hours layover), **AND** prior **approval from FAS** is granted prior to the purchase of the ticket.   In order to obtain the approval from FAS send an email request to Cheryl Huson (chuson@ussec.org) that includes a strong justification.  The request will be forwarded to FAS.

 **EMP** funded travel is restricted to coach class regardless of scheduled travel time.  All flights must be on an American Flag carrier or European Flag carrier. U.S. only travel is not permitted.

U.S. only travel is not permitted with the exception of one escort of a foreign trade mission.  **One** home office employee **OR** one state department of agriculture employee **OR** one board member may accompany foreign trade missions and technical teams while traveling in the United States.

**The following documentation is necessary for all business class travel:**

Itinerary must show both the fully refundable and non-refundable (if applicable) business class cost and coach on the business class itinerary. Itineraries are maintained in the files with all other necessary information.

* The ticket price must be lower than the maximum cost of airline ticket on the travel authorization form.
* Lowest airfare either business or economy must be purchased.
* Travel must be by a direct or usually traveled route.

All airline charges made by the LS are charged to their American Express Corporate credit card or Diners card. Any changes made in route are to be paid for by the traveler.

If the itinerary meets the compliant standards, including staying within budget limitations and funding restrictions specified on the Travel Authorization Form, then the itinerary is emailed to the traveler for approval to ticket.

If the itinerary is not compliant, the LS emails the American Express travel, dedicated agent to change the itinerary to be within the guidelines. The itinerary is resent to travel@ussec.org & LS.

Once the LS has received approval to ticket, an email is sent to American Express travel agent to issue the ticket. The electronic ticket/receipt is emailed to travel@ussec.org & LS.

All airfare booked by USSEC LS is charged to the LS American Express credit card or Diner’s Card. If the Contractor books his/her own ticket, all charges go against the traveler’s credit card.

**14 calendar days** prior to the trip, the LS will receive the post notification from the Project Manager.

**10 calendar days** prior to the trip, the LS will send insurance, trip report guidelines, expense report guidelines, electronic ticket information, and lodging and ground transportation information.

**Passport and Visas**

Consultants are responsible for their own passport and visas. If a visa is required for travel, the Country Office (region) will provide a letter of invitation and the LS will provide a business letter, if necessary.