**24e. INBOUND TEAM TRAVEL PROCEDURES**

Updated 9/30/2018

A finalized ADNOT is prepared and routed to the St. Louis Office for review and approval. The USSEC Project Manager or Regional Office will send this at least **50 calendar days** prior to the team’s departure date. ADNOTS template is located **Q** **or X:\Projects\Resources\Templates & Forms\ADNOT Templates**. The Country Office (region) notifies the Director, Stakeholder Relations Manager, Stakeholder Relations Coordinator, and Logistic Specialist (LS) of a team visit by the submission of an **ADVANCE NOTIFICATION OF TEAM VISIT (ADNOT**). The ADNOT is sent to the ADNOT email box at [ADNOTS@ussec.org](mailto:ADNOTS@ussec.org). Work is not started on the itinerary until the ADNOT is received.

The Stakeholder Relations Manager and Stakeholder Relations Coordinator will coordinate the site visits and other necessary arrangements for the team visits and will work with the Event Planner, if stopping in St. Louis.

For the team planning to precede all pertinent information must be included in the ADNOT. Initially, the names of the individual team members may not be known; however, the Country Office (region) should be able to indicate the number of team members.

A copy of the ADNOT will be filed at: **Q: \Marketing\Program Assistant\ADNOT received calendar year**. LS will confirm with the Project Manager that the ADNOT has been received.

An activity file folder is set up with the team’s name, project number and travel dates. All correspondence or information relative to the team is to be kept in this folder. The LS is responsible for maintaining all information relating to each team visit. The LS will create a folder under the team name located Q:\Marketing\Program Assistant

A rough itinerary, following suggestions from the ADNOT, will be planned and saved at: Q:\Marketing\Program Assistant\TRADE TEAM AGENDA TEMPLATE

All communications with vendors (Hotel, Transportation Company, University, Conference organizer, Restaurant, etc.) will include a copy to the Project Manager specified in the ADNOT so he/she is aware of the approximate rate per person for a rough idea of how the final expenses would be based on the number of team members who plan to make the trip.

Once a general outline has been formed, proceed with detailing the itinerary as follows:

**Hotel Reservations:**

Try to locate a hotel near the airport or the site of the team visit whichever is more convenient and includes ground transportation and breakfast. Look at **Q: \Marketing\Program Assistants\Hotel, Transportation List** for past hotels utilized.

The American Express Corporate Card or Diners Club Corporate Card will be used to pay for the hotel accommodations room and tax only. (Exceptions are made when team members pay for their own hotel accommodations. This type of information is located in the ADNOT. If team members are paying for their own hotel rooms, advise the team escort to relay to the team members to charge only the room and tax not incidental fees, e.g. movie rental, food/beverages, laundry service, telephone calls, etc.

The LS credit card will be given as a guarantee for late arrival if the team members are paying for their own room and tax. If the room and tax are charged to the LS credit card, advise the team escort that the team members will have to bring a credit card for their incidentals and that a charge maybe implemented on their credit card when the team member checks in as a deposit for the incidentals and therefore will be removed at checkout. The LS will obtain all receipts and folios from the hotel if the room and taxes are charged to the LS credit card.

Check the website for the per diem hotel rate in the state where the team is traveling at [www.gsa.gov](http://www.gsa.gov). Click on per diem rates at the top left-hand corner. If the hotel rate exceeds the per diem rate, an exception memo is required. The exception memo is located at Q:\Projects\Resources\Templates & Forms\Exception Memo Templates. The exception memo should be approved according to USSEC’s Delegation of Authority Matrix.

Call the hotel and ask to speak with someone in group sales or the sales department depending upon the number of team members or call your hotel chain sales contact to make your hotel reservations. Ask for government rate. If the hotel cannot give the government rate and is more than the per diem rate, advice the team escort that a memo will need to done.

Send a credit card authorization letter located at **Q: \Marketing\Forms\Credit Card Authorization** to the appropriate hotel.

Provide a rooming list to the hotel noting first and last names of the team members include the bus driver if applicable. Once you receive confirmation numbers, rate and cancellation policy, add to the itinerary.

Make sure the team escort knows that if a room is cancelled, it must be done by the cancellation date specified by the hotel or USSEC will be charged a “no show” fee. No show charges cannot be charged to an FAS project as the charges are not considered complaint.

**Airline Reservations:**

LS will make airline reservations if requested in the ADNOT.

A Travel Authorization Form will need to be completed, approved and signed according to the USSEC Delegation of Authority Matrix prior to airline tickets being purchased. Once approved, a travel authorization number will be given for the travel request.

The USSEC Country Office (region) usually arranges for the team’s international airline tickets; however, the LS may be requested to arrange any domestic tickets. The ADNOT should clearly state who is responsible for the arrangement of any require domestic or international airline tickets. The Country Office (region) should provide passport copies for names and date of birth.

If the ticket is being booked by the LS, contact will be made with the American Express Travel dedicated agents to arrange for airline tickets. The American Express Travel Agent will send a tentative travel itinerary to review for compliance to the [travel@ussec.org](mailto:travel@ussec.org) & LS email box. If the travel itineraries are compliant, then the itinerary is sent to the Project Manager to approve. Once the LS has received approval, then the tickets can be issued. All electronic tickets/receipts are sent to the [travel@ussec.org](mailto:travel@ussec.org) email box.

**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 PM 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 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](mailto: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](mailto: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](mailto:travel@ussec.org) & LS.

All airfare booked by USSEC LS is charged to the LS American Express credit card or Diner’s Card

**Ground Transportation:**

If ground transportation is requested on the ADNOT, reservations will be made according to the budget listed on the ADNOT. Note: There is no per diem for ground transportation although it must be reasonable. A spreadsheet with past companies utilized is located at **Q: \Marketing\Program Assistant\Hotel, Transportation List**.

A car, van or bus (with driver) will be reserved depending on the size of the team in the various locations where ground transportation is required. Room for luggage will be allowed. It is customary to provide gratuity for the driver. If the bus/driver will remain with the team an extended period of time, a determination will be made with the bus company as to whether or not the cost of the driver’s hotel room(s) will be included in the contract amount and whether or not USSEC will pay the driver’s room expense along with those of the rest of the team.

The bus driver’s meals are the responsibility of the driver. USSEC may pay for a meal if so inclined, however, the team escorts are not required to provide meals.

The LS American Express card or Diners Club card may be used for payment. When services are complete, the company must provide an invoice and receipt of payment. If a credit card authorization form is required, the LS will provide a copy to the appropriate rental car/bus company.

The bus driver’s name, cell phone and contact number and address for the bus company is added the itinerary.

**Meeting Rooms:**

Occasionally, the Project Manager will request the LS to set up a meeting room. The LS will contact the hotel to see if there is availability and a cost. Often times, the hotel will not charge for the meeting room. The LS will work with the Project Manager to determine whether or not food, beverages and audio visual equipment are required.

As soon as the details are final, the final itinerary information will be updated. The Project Manager will provide confirmation of appointments, site visits, times, contact names, etc. and any other details to the itinerary. The finalized itinerary will be distributed to the Country Office (region) no later than five business days prior to the team’s departure to the U.S. with the Declaration of Coverage and Plan features to each team members.

**Conference or Trade Show Registrations**

If the trade team is attending a conference or trade show, the LS will register the team members. The conference information must be included within the approved ADNOT.

**Contracts**

If LS books a hotel or a bus, the company may require a contract. The contract must be reviewed by the St. Louis Contracts Department. Once approved, the contract will be signed according to USSEC’s Delegation of Authority Matrix.

**Insurance**

The team members are only covered by the insurance during the period of their team visit.

**Expenses**

Once the expenses for the team have been collected, the LS will provide the team escort and Project Manager a summary of the expenses using the Team Expense Summary located at **Q:\Marketing\Forms\Team Expense Summary.**

The Team Expense Summary includes hotel accommodations, meeting rooms, domestic airline tickets, ground transportation and miscellaneous expenses.