



UNIVERSITY
OF
LOUISIANA
L a f a y e t t e™

State of Louisiana
**LACARTE PURCHASING CARD
AND
TRAVEL POLICY**

July 1, 2026

University of Louisiana at Lafayette LaCarte Purchasing Card and Travel Policy

This LaCarte Purchasing Card and Travel Policy is approved for implementation as the official purchasing card policy for the University of Louisiana at Lafayette and supersedes all previous versions.

Approval

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Srl

Signed by:



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Dr. Ramesh Kolluru
President

Date: 7/17/2026

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INTRODUCTION

University of Louisiana at Lafayette

LaCarte Purchasing Card

The University of Louisiana at Lafayette ("UL Lafayette") has entered into an agreement with the State of Louisiana ("State") and the Bank of America to participate in the LaCarte Purchasing Card program. The Louisiana Purchasing Card ("LaCarte Purchasing Card," "LaCarte Card," "P-Card" or "Purchasing Card") is a Visa credit card issued by the Bank of America for the State of Louisiana. All P-Cards are issued with corporate liability, under which the state is liable for the cost of the purchases. The program is based on the strength of the State's financial resources, not the personal finances of the cardholder. Due to the state liability, Corporate P-Cards are to be issued in the name of State of Louisiana employees only.

Cardholders are permitted to purchase low-dollar materials on non-restricted items directly from vendors without the submission of a requisition or issuance of a purchase order. P-Card purchases are generally limited to low-dollar expenditures of \$5,000.00 or less, per transaction. P-Card charges over \$5,000.00, or authorized limit, will be declined at point of sale. The P-Card must also be used for travel-related charges, excluding meals and incidentals.

The Purchasing Card was designed to provide an efficient, cost-effective method of purchasing and paying for small dollar as well as high-volume purchases. This program shall be used as an alternative to the traditional purchasing order process and can result in a significant reduction in the volume of purchase orders, invoices, and checks processed.

The policies and procedures for the LaCarte Purchasing Card were not intended to replace current State Procurement or State Travel Policies, Rules and Regulations, nor Louisiana Statutes or Executive Orders. As a state agency, UL Lafayette employees must adhere to certain state and federal regulations and laws. To ensure compliance with these regulations and laws, LaCarte program participants must comply with the policies outlined in the LaCarte Agreement Form specifically written for their particular role in the program. The policies in the agreement, as well as any revisions by UL Lafayette's LaCarte/Travel Office pertaining to this program, must be followed when using the LaCarte Purchasing Card.

TERMS / DEFINITIONS

University of Louisiana at Lafayette LaCarte Purchasing Card

TERM	DEFINITION
Cardholder:	Authorized UL Lafayette employee, <u>whose name appears on the LaCarte Purchasing Card</u> and, who is accountable for all transactions made with the card.
Cardholder Agreement Form:	Agreement signed by the cardholder, prior to being issued the Purchasing Card, which verifies that the cardholder has read and understands the policies and procedures of the State and UL Lafayette and agrees to comply with them.
Cardholder Enrollment Form:	Form containing pertinent information on the cardholder necessary for statement mailing, contact information, daily/monthly spending limits and budgetary controls. .+ Supervisors requesting a University LaCarte Card for an employee must complete and submit the <i>University of Louisiana at Lafayette LaCarte Cardholder Enrollment Form</i> in Cornerstone. <i>The link will be sent by the travel office upon request.</i> The account assigned to an individual cardholder's card. All charges made by the cardholder will default to this account until transferred into the appropriate line item.
Department Head:	The Department Head for higher education is the university president or their designee.
Memo STATEMENT of Account:	A listing of all transactions charged to the cardholder's account through the end of the monthly billing cycle. The bank sends this statement, directly to the cardholder, on a monthly basis for reconciliation purposes. This statement is not a bill for the cardholder to pay. Cardholder must reconcile the transactions on this statement by the fifteenth (15 th) of the month.
Merchant Category Code (MCC):	Codes that are assigned to vendors by the bank indicating the type of business. The Purchasing Card is encoded with types of MCC's that the cardholder is authorized to purchase. Some MCC's are prohibited or restricted by the State of Louisiana and/or UL Lafayette. Attempts to use LaCarte card with vendors that possess these codes will be denied. Continued attempts will result in disciplinary action.
Merchant / Supplier:	Vendor from which a cardholder is purchasing products or services.
Monthly Spending Limit:	A dollar limit set on the cardholder's card for the total of all charges made during the monthly billing cycle.

TERMS / DEFINITIONS

University of Louisiana at Lafayette LaCarte Purchasing Card

TERM	DEFINITION
Program Administrator:	UL Lafayette's Director of Purchasing, or their designee, who acts as liaison between the cardholder, the State Program Administrator, and Bank of America. This person provides support and assistance, processes new card applications, changes to cardholder information, provides training, and maintains policies and procedures.
Purchasing Card:	A Visa credit card issued by Bank of America for the State of Louisiana for the purpose of making authorized purchases on behalf of UL Lafayette. It is referred to as the LaCarte Purchasing Card, LaCarte Card, Purchasing Card or P-Card.
Receipt:	A merchant-produced original document that records the relevant details for each item purchased including quantities, amounts, a description of what was purchased, the total charge amount and the merchant's name and address (e.g. sales receipt, original invoice, packing slip, credit receipt, etc.). This must match the online transaction amount and be matched to any other related documentation regarding the transaction.
Return Merchandise Authorization (RMA) Number:	A number issued by the vendor to reference the returned order and ensure proper handling (exchange or credit) of the return. Depending on the vendor, it may be sometimes referred to as a Return Goods Authorization (RGA) number.
Supervisor/Reviewer/Approver:	Individual within UL Lafayette that is responsible for providing a meaningful review of all itemized receipts to verifying that all charges against the cardholder's account are authorized and supported by proper and adequate documentation. This individual may be responsible for assigning the cardholder's spending limits per transaction and per billing cycle, as well as the maximum number of transactions allowed within each billing cycle (within the overall limits established by the State Division of Administration and the Office of Management and Finance). This individual shall be either the UL Lafayette Department Head, Director or Dean or his designee.
Support Documentation:	Vendor produced documents that reflect the relevant details of each item purchased, including quantity, description, cost, total charge amount, vendor's name and address. These documents shall be original detailed/itemized sales receipts, invoices, packing slips, credit receipts, disputes and written approvals.
Transaction / Charge Limit:	The per transaction dollar limit set on each cardholder's card. The UL Lafayette Program Administrator will determine the limit to be set. A single transaction/charge may include multiple items, but total dollar amount cannot exceed cardholder's limit. (Transaction/Charge Limit may be also referred to as a Single Purchasing Limit or Single Transaction Limit.)

POLICIES AND PROCEDURES

University of Louisiana at Lafayette LaCarte Purchasing Card

Overview:

- The LaCarte Purchasing Card is a Bank of America Visa credit card used by authorized UL Lafayette employees to purchase goods, services and travel expenses up to \$5,000.00, or authorized transaction limit, per transaction, including shipping and handling, and excluding taxes for bona fide University purposes. Any deliberate attempt to use the Purchasing Card for personal use will be considered theft.
- Using the P-Card for purchases of supplies, low-dollar amount equipment and furniture, operating services and/or repairs must comply with proper purchasing procedures, rules and regulations, Louisiana Statutes and Executive Orders.
- UL Lafayette is exempt from Louisiana state sales taxes. The cardholder should notify the vendor of the tax-exempt status prior to any credit card transaction. The cardholder shall not fill out any tax exemption forms. The State of Louisiana's tax exemption number is on the front of the LaCarte card for easy reference or available on UL Lafayette's Purchasing website.

Purpose and Benefits of Using the Purchasing Card:

- To simplify and reduce costs of the purchasing and payment processes for goods, services and/or travel expenses under \$5,000.00, or authorized transaction limit. At the discretion of the agency, transactions over \$5,000 must have prior approval from the Office of State Travel by requesting it through the UL Lafayette LaCarte/Travel Office. The cardholder may use the card to make legal, authorized and allowable purchases from vendors without a purchase requisition.
- To reduce the number of invoices processed by UL Lafayette's Accounts Payable Department. One (1) monthly master bill is received from the Bank of America for all cardholders versus the handling of large volumes of individual low-dollar amount invoices.
- To enable Bank of America to pay the vendor within two (2) business days of requesting payment for merchandise or services.

Obtaining a Purchasing Card:

- The Enrollment form can be obtained through the University's Cornerstone training portal. Supervisors requesting a University LaCarte Card for an employee must complete and submit the *University of Louisiana at Lafayette LaCarte Cardholder Enrollment Form* in Cornerstone. *To locate form type LaCarte into Learning Search under the "Click to Access All*
- The employee's supervisor must complete the enrollment form for each prospective cardholder under their authority. The supervisor may set spending limits per transaction and/or per billing cycle pending approval from the Vice President of Finance and Director of Procurement.
- The employee must complete the assigned Annual Training that will be found in your Assigned Training section as well as complete the LaCarte Cardholder Agreement which will be found in your Pending Performance Tasks.
- When UL Lafayette's LaCarte/Travel Office receives the requested card from the bank, the cardholder shall be notified..

POLICIES AND PROCEDURES

University of Louisiana at Lafayette LaCarte Purchasing Card

- No P-card (LaCarte Card) shall be issued to any agency program administrators, President of UL Lafayette, Vice President of Administration and Finance, auditor, or any other roles associated with administering, monitoring or reviewing the activities of the P-Card program, as well as any non-state employees.

How the LaCarte Card May Be Used:

The LaCarte Card may be used for the purchase of any bona fide University business goods, services and/or travel expenses provided that the transaction does not:

- Exceed \$5,000.00, or cardholder's single transaction limit, including shipping and handling charges, excluding taxes. The card will not accept charges over \$5,000.00, or cardholder's single transaction limit. Transactions over \$5,000 must have prior approval from the Office of State Travel, which is obtained through the UL Lafayette's LaCarte/Travel Office.
- Fall within a restricted or prohibited Merchant Category Code.
- Fall within one of the categories listed in the Restrictions on Card Use section of this handout.

ULL has Office of State Travel (OST) Approval to allow travel expenses on the LaCarte Card

Based on individual needs, with written permission by the Office of State Travel and approval of UL Lafayette's LaCarte/Travel Office, some restricted merchant category codes may be allowed.

Note: In the event of a declared emergency, UL Lafayette's LaCarte/Travel Office may increase transaction limits for essential cardholders that would be active during an emergency situation. This will not apply to all cardholders. Purchases must be made in accordance with the Statewide LaCarte and CBA Policy. Higher limits do not eliminate the need to follow emergency procurement rules, policies, procedures and/or the Governor's Executive Orders.

Purchasing Card Cycle:

- The LaCarte Card statement date is the fifth (5th) of each month. Cardholders should receive an email from the Bank of America on the sixth (6th) of the month notifying them that the statement is now available online.
- Cardholder shall review the statement for appropriate and accurate charges.
- The original itemized supporting documents for each charge or credit shall be kept in the cardholder's department and attached in Chrome River to the corresponding Expense Report. In the case of an audit, Chrome River is the central repository for all receipts.
- LaCarte transactions are to be reconciled in Chrome River by the fifteenth (15th) of the month. Failure to timely reconcile transaction by the twentieth (20th) or provide required documentation may result in suspension of the cardholder's LaCarte Card privileges for a minimum of thirty (30) days or until all outstanding reconciliation requirements have been satisfied.

POLICIES AND PROCEDURES

University of Louisiana at Lafayette LaCarte Purchasing Card

- UL Lafayette's Administrative Services office remits an electronic payment to the Bank of America by the twenty-fifth (25th) of each month for all LaCarte Purchasing Cards transactions. At no time shall cardholders make payments directly to the bank.

LACARTE PROGRAM RESPONSIBILITIES

University of Louisiana at Lafayette LaCarte Purchasing Card

General Responsibilities:

- Program administrator will maintain a current list of all cardholders and approvers for the LaCarte card program. Program administrator will be responsible for adding new cardholders and approvers to the WORKS system, and also for removing cardholders and approvers who are no longer in that role.
- It is the approver's responsibility to ensure that all cardholders under their authority abide by the requirements of the cardholder agreement. Approvers must perform a meaningful review of itemized receipts, business purpose, attendees, food indicators, and reasonableness before approval. Approval certifies the expense is allowable, accurate and supported.
- It is the cardholder's responsibility to use UL Lafayette's Purchasing Card for payment of goods, services and travel expenses under \$5,000.00, or the cardholder's single transaction limit, including shipping and handling charges, and excluding taxes. The transaction and credit limits on the card have been set by the Vice President of Administration and Finance as well as the cardholder's department P-Card Manager. Transactions over \$5,000 must have prior approval from UL Lafayette's LaCarte/Travel Office and the Office of State Travel. Reminder: The card will not accept charges over \$5,000.00, or cardholder's single transaction limit.
- It is the cardholder's responsibility not to artificially divide purchases ("split purchases"). Splitting purchases to keep each of the transactions within the limits of UL Lafayette's Purchasing Card is not authorized. Multiple purchases to the same vendor on the same day or within a few days are allowed, if the total dollar amount of the purchases to that vendor does not exceed the cardholder's single transaction limit. Cardholders utilizing a state contract vendor must adhere to the same policy and must ensure that these items are approved contract items. Cardholders must ensure that violation of this policy may result in cancellation of the UL Lafayette Purchasing Card and/or disciplinary action.
- It is the cardholder's responsibility not to allow Louisiana state sales tax to be charged on LaCarte Card purchases. Cardholders must make every effort, at the time of purchase, to avoid state sales tax charges to the card. UL Lafayette's tax-exempt number is printed on the front of the LaCarte Purchasing Card for easy reference. If state sales taxes are charged, it is the cardholder's responsibility to have the vendor issue a credit to the cardholder's LaCarte Purchasing Card or reimburse the university. If a cardholder continually allows taxes to be charged to the card, corrective measures will be taken by the UL Lafayette LaCarte/Travel Office. Corrective measures may include cancellation of cardholders Purchasing Card privileges or reporting to the Office of Human Resources.
- The LaCarte Card will remain the property of the State of Louisiana. It shall NOT be transferred, assigned to, or used by anyone other than the designated cardholder. The cardholder shall be required to surrender the Purchasing Card at the request of UL Lafayette or any authorized agent of the Bank of America.
- Personal or other unauthorized charges are not allowed on the Purchasing Card.

Violations may cause cancellation of card and/or disciplinary action and reimbursement by the cardholder.

- In the event a vendor participates in a program where reward points are earned, gift cards are issued as incentives, etc., cardholder may use these earnings toward the purchase of state goods. The rewards must NOT be used for personal use. Employees must comply with UL Lafayette's current Group Travel Guidance/Policy.
- Cardholder shall never put the full LaCarte Card number in emails, reports, memos, etc. If designation of an account is necessary, only the last four digits of the account number shall be used.
- The P-Card is the property of the State of Louisiana, and the cardholder is responsible for the physical security and control of the P-Card and its appropriate use. The Cardholder is also responsible for maintaining the security of card data such as the account number, the expiration date, and the card verification value (CVV), the 3-digit security code located on the back of the card.
- Cardholder shall secure all assigned WORKS and Chrome River application User IDs and passwords, and shall **never** share User ID and passwords, leave the work area while logged into the system, or leave log-in information lying in an unsecure area.
- Cardholder shall never send a copy of the P-Card if requested by a merchant. If this is required for payment, then the cardholder must verbally provide the number or use another form of payment other than the State Liability P-Card.
- UL Lafayette retains the right to cancel a cardholder's privileges. Cards may be revoked for misuse or non-compliance with policies and procedures and/or Cardholder's Agreement. Should the policies and procedures and/or Cardholder's Agreement be violated more than three (3) times in any twelve (12) month period, the Program Administrator may cancel the cardholder's LaCarte card.
- It is the responsibility of the cardholder or Supervisor to notify UL Lafayette LaCarte/Travel Office of a cardholder's extended leave. To reduce the risk of fraud, should a LaCarte cardholder be on extended leave the card profile shall be reduced to a \$.01 limit or shall be suspended. Once the cardholder returns to work, the profile shall be returned to the original limit.
- Should a cardholder be absent when Expense Reports and reconciliations are due, the cardholder may assign a delegate to prepare the Expense Report on the cardholder's behalf. The cardholder remains responsible for timely reconciliation of all LaCarte transactions and must review and approve the Expense Report submitted by the delegate. A delegate may prepare the report but may not approve it on the cardholder's behalf.
- Online accounts, such as Amazon, eBay, etc., must have a standalone business account or registration and must not be combined with an individual's personal account. Upon request, cardholder is to provide proof that account is set up as a separate business account by providing a list of processed transactions printed from the vendor's website.
- Agency Program Administrators and approvers must annually review spending limits and MCCs against actual usage and terminate cards that show consistently low usage or have been dormant for one year.
- Cards that remain dormant for a twelve (12) month period shall be cancelled unless justification is provided, and approval is granted. Cardholders requiring future

purchasing authority may reapply through the University's established card issuance process.

- Annually, all program participants (i.e. program administrators, cardholders and approvers) are required to complete the Annual Training assigned in Cornerstone and sign the Agreement Form acknowledging responsibilities associated with the State Liability P-Card Program (LaCarte).
- Annually, all program participants (i.e. program administrators, cardholders and approvers) are required to complete the online certification Office of State Travel (OST) approved training and UL Lafayette agency training program with a passing grade of at least 90. Failure to complete required annual training and agreement by established deadline may result in suspension of LaCarte Card or reassignment of approver duties until completion is documented.
- A cardholder's approver must be a supervisor (or designee) of the cardholder which would be at least one level higher than the cardholder and be most familiar with the business needs of the cardholder. Each approver may not be the approver for more than twenty (20) cardholders.
- Cardholder's business email address must match the cardholder's name. Another cardholder's email address may not be used without the approval of the Commissioner of Administration.
- Cardholders changing departments within the UL Lafayette campus shall notify UL Lafayette's LaCarte/Travel Office of the change so that the account code can be changed in the WORKS system.
- The LaCarte Card is the property of the State of Louisiana. Upon termination or retirement, the card must be surrendered to the P-Card Manager and will be canceled by the program administrator.
- According to the Human Resources Policy, employees separating from the University must have a completed Separation Clearance Form routed by Human Resources through DocuSign. The Separation Clearance Form certifies that the employee has no unpaid University bills, returned all University property, and removed campus parking permit from vehicle(s). Final paycheck may be held until the Separation Clearance Form is completed. Included in the Separation Clearance Form is a place for the UL Lafayette Office of Purchasing and Travel/LaCarte program administrator, or designee to sign verifying that the employee's LaCarte card and final reconciliation and supporting documentation have been received. At this time, the LaCarte card will be canceled by the program administrator.
- In addition to the Separation Clearance Form, the IT Department sends the Assistant Director of Purchasing for Travel/LaCarte an email from the Cherwell System advising of employee departures and transfers.

Telephone, Internet and Mail Orders:

- Cardholder shall provide vendor with cardholder's name, UL Lafayette department name, credit card number, tax exemption status, complete shipping address (i.e. street address with internal location such as building name and room number, and department's campus post office box, if possible) and billing address.
- Cardholder shall instruct vendor to include the following in the delivery package: a sales

receipt, and an invoice or Purchasing Card charge slip itemizing the order. The sales receipt, invoice and/or charge slip shall identify the purchase as a Visa Card purchase.

- Cardholder shall scan and attach the itemized invoice to the transaction in Chrome River and retain all original supporting documents in the department.

Declined Transactions:

- If a LaCarte Card transaction is declined, cardholder should notify the UL Lafayette LaCarte/Travel Office. Vendor does not have information related to the reason for decline, nor does the cardholder have the authority to obtain this information. UL Lafayette's LaCarte/Travel Office shall obtain the information on the declined transaction, coordinate resolution and advise the cardholder.
- If a purchase attempt using a LaCarte card is declined, the merchant should not continue to swipe the card if it does not work the first time. The cardholder should call the UL Lafayette LaCarte/Travel Office to determine the cause of the decline.
- Possible reasons for Purchasing Card declines include:
 - attempted purchase exceeds the authorized transaction limit.
 - credit card account is over the monthly limit of transactions and/or spending limit.
 - incorrect entering of credit card number or other credit card information.
 - Vendor's registered Merchant Category Code is prohibited.
 - Credit card has not been activated.
 - Bank has a fraud watch on card.

Statement Reconciliation and Approval Process:

- The primary responsibility for the reconciliation and approval process rests with the cardholder.
- Each cardholder will receive a statement from the Bank of America each month. The LaCarte Card statement date is the fifth (5th) of each month. Cardholders should receive an email from the Bank of America on the sixth (6th) of the month notifying them that the statement is now available online.
- Cardholder shall compare the transactions on the statement with the original sales receipts, invoices, credit card slips, credit receipts, etc. (supporting documentation) to ensure that the dates, vendors and amounts charged match. Documentation is required for all purchases and credits.
- Each transaction listed on the statement must have original supporting documentation. This includes transactions that cancel each other out (i.e. purchase and return for the same item).
 1. For items purchased over the counter, the cardholder should obtain the customer copy of the itemized receipt. When ordering by telephone, fax, or computer, the cardholder must obtain an invoice or similar document. For items such as registrations, where the vendor does not normally generate a receipt or packing slip, a copy of the ordering document may be used. Acceptable documentation must include a line description, with full description not a generic "general merchandise" description, quantity, and line-item pricing for the purchase. Electronic receipts are allowed if they are un-editable and are maintained in compliance with the agency retention policy.

- For internet purchases, the printout of the order confirmation showing the details, the printout of the order details, or the shipping document if it shows what was purchased, the quantity and the price paid will suffice for the itemized receipts.
- All original supporting documentation for each transaction is to be kept in the cardholder's department. Should any item on the statement be in dispute, a Statement of Disputed Items should be attached to the transaction in Chrome River. Transaction must still be reconciled in Chrome River.
- Cardholder can NEVER be the final approver of their own transactions.
- UL Lafayette's LaCarte/Travel Office is responsible for performing post audits of cardholder transactions to monitor appropriate use while verifying that purchases are made in accordance with Corporate Liability "LaCarte" Purchasing and CBA Card Policy, all current purchasing policies, purchasing rules and regulations, Louisiana Statutes, Executive Orders, State Liability Travel Card and CBA Policy and PPM49, if applicable. All reconciled transactions and receipts shall be reviewed for completeness and correct coding by the appropriate comptroller, and the UL Lafayette LaCarte/Travel Office. Monthly certifications that the procedures of the audit section of this policy have been conducted must be submitted to the Office of State Travel. The certification will indicate that agency personnel administering the P-card Program has generated the required reports, all requirements listed in policy have been completed, and necessary findings have been investigated, documented and handled appropriately.
- It is encouraged by the Office of State Travel that routine audits be performed by UL Lafayette's Internal Auditor once every three (3) years for compliance with State Procurement and Office of State Travel Rules and Regulations.
- All transactions and supporting documentation must be, at a minimum, randomly audited, by a second party, either the agency's fiscal section or the agency program administrator.
- UL Lafayette's LaCarte/Travel Office will track cardholder reconciliations as they are received and shall issue reminders to cardholders that have not reconciled their Chrome River transactions by the twentieth (20th) of the month. Failure to do so will result in card suspension for up to 30 days.
- The approved account and expense codes for each transaction will be uploaded automatically from Chrome River to the cardholder's budget expenditure account in Banner.

Disputed and Questioned Items:

- Cardholder shall be responsible for ensuring receipt of goods, services and travel expenses, and resolving any receiving discrepancies or issues of damaged goods.
- Cardholder shall be responsible for settling any disputes with the vendor (except fraudulent charges), clearing duplicated charges, requesting credit for tax, and requesting credit for returned merchandise.
- Cardholder shall notify the UL Lafayette LaCarte/Travel Office immediately if they are suspicious of possible fraudulent charges. If it is determined that fraudulent transactions have been charged, or attempted to be charged, on a cardholder's card, UL Lafayette's LaCarte/Travel Office shall deactivate the card. The cardholder shall immediately contact the Bank of America and request that a new card be issued.

- Cardholder shall contact vendor to resolve any outstanding issues.
- If cardholder is unable to reach an agreement with vendor, the Cardholder must complete a Statement of Disputed Items and submit it to the Bank of America within sixty (60) days of the statement date on which the item appears.
- A copy of the Statement of Disputed Items should be attached to the transaction in Chrome River.
- UL Lafayette's LaCarte/Travel Office will be available to assist cardholders in resolving disputes to ensure proper credit is given on subsequent statements.

Penalties for Misuse of Purchasing Card:

Any recognized or suspected misuse of the P-card program should be immediately reported to the agency program administrator and may be anonymously, reported to the State of Louisiana Inspector General's Fraud and Abuse Hotline at 1-866-801-2549, or for additional information one may visit

<http://oig.louisiana.gov/index.cfm?md=pagebuilder&tmp=home&nid=3&pnid=0&pid=4&catid=0>.

If a cardholder unintentionally charges a personal item on their LaCarte card, it is that cardholder's responsibility to report it to their approver, and to the program administrator. The cardholder shall reimburse the university by making payment to the Cashier's Office in the Student Union or as a payroll deduction. The last four (4) digits of the cardholder's credit card number, expense report number, the fund account number and expense code shall be provided to the Cashier's Office as well. The transaction must be reconciled in Chrome River and the allocation representing "non-reimbursable" (NREIMB) shall be used. If reimbursement is made to the Cashier's Office, a copy of the reimbursement shall also be attached to the transaction in Chrome River for audit purposes. At no time should the cardholder make a payment directly to the bank. In the event this type of purchase happens more than once in a twelve (12) month period, disciplinary actions may be taken.

In the case of willful or negligent default of obligations under the Cardholder Agreement (including falsified receipts, altered receipts, misleading descriptions or charges disguised as other expense types), the State/UL- Lafayette has the following rights, to the extent authorized by law:

- To deduct from cardholder's paycheck, any unauthorized charges in accordance with UL Lafayette Purchase Card policy, until all unauthorized charges are paid in full.
- The State/UL Lafayette may pursue any remedy for the recovery of unpaid amounts, including referring unpaid amounts to an attorney for collection.
- The State/UL Lafayette may impose any appropriate corrective or disciplinary action permitted, including cancellation of Purchase Card privileges and/or up to termination and possible criminal charges, under applicable law.

According to the Approver Agreement, failure to properly fulfill responsibilities as a P-card approver could result, at a minimum, in the following:

- Written counseling which would be placed in the employee file for a minimum of 12 months.

- Consultation with UL Lafayette program administrators, and President/Vice President of Administration and Finance and internal audit section.
- Disciplinary actions, up to and including termination of employment.
- Legal actions, as allowed by the fullest extent of the law.

Lost or Stolen Cards:

Cardholder MUST report any lost or stolen cards immediately:

- **Call Bank of America at (888) 449-2273**
 - This number is available 24 hours a day, 7 days a week, 365 days a year. The bank shall immediately cancel the card and forward a replacement card within 3-5 business days.
- **Email UL Lafayette's LaCarte/Travel Office at lacarte@louisiana.edu.**

Returns and Exchanges of Merchandise:

- If merchandise purchased with the LaCarte Card is not acceptable (incorrect, damaged, defective, etc.), the cardholder shall be responsible for contacting the vendor to arrange for the proper return for credit or exchange. Note: If the return is due to defective merchandise or vendor error, postage should be paid by vendor. If the return is due to cardholder error, or the Cardholder no longer wants the shipment, the Cardholder, not the university nor the vendor is responsible for the cost of the return, unless written permission is granted by the Purchasing Department.
- The cardholder should always retain boxes, containers, special packaging, packing slips and other related or relevant information until certain the merchandise is acceptable.
- For merchandise to be exchanged, the cardholder shall be responsible for returning the merchandise to the vendor and obtaining a replacement as soon as possible.
- For merchandise returned in person, the cardholder shall be responsible for obtaining an original credit receipt from the vendor.
- For merchandise shipped back to the vendor, cardholder shall prepare package according to vendor instructions and retain shipping documents until vendor issues credit or exchanges merchandise. Cardholder should request a shipping label and a Return Merchandise Authorization number (RMA) from the vendor.
- If a shipping charge or restocking fee applies, the charge shall be applied to the LaCarte Card.
- Documentation of the exchange or return shall be retained along with the original supporting documentation of the original purchase.
- The vendor must issue credit to the LaCarte Purchasing Card. Receiving cash or checks to resolve a credit is strictly prohibited.

Surcharge/Convenience Fee:

Merchants may include a surcharge or convenience fee. VISA and MasterCard have strict merchant guidelines governing the assessment of surcharge fees:

- The merchant must register with VISA 30 days prior to beginning a surcharge policy.
- The merchant must provide clear disclosure to the customer.
- The amount of the surcharge must be listed as a separate item and detailed on the receipt.
- The surcharge must apply to all credit cards accepted by the merchant.
- The surcharge must be equivalent to the merchant's interchange rate but cannot exceed 4%.

For any charge where the Supplier has charged a surcharge, a cardholder or user should obtain a copy of the acknowledgement letter sent to the Supplier by Visa authorizing the Supplier to impose a surcharge as part of their supporting documentation.

Convenience Fees are charged as a flat fee (regardless of the total cost) when purchases are made via one form of payment channel over another – online or by phone vs. in store or by mail.

Restrictions on Card Use:

The LaCarte Purchasing Card may not be used for the following purchases:

- Alcoholic Beverages
- Cash Advances or gift cards
- Consultant fees, Speaker fees or honorariums
- Professional services, or any service that requires a contract. No one is authorized to sign contracts on behalf of the university except the V.P. of Administration and Finance or the President.
- Controlled Substances (prescription drugs, narcotics, etc.), unless special permission has been granted.
- Entertainment costs (ski tickets, tours, etc.), unless special permission has been granted.
- Food and Special Meals (or food related items such as cups, plates, cutlery), unless a Special Meals Pre-Approval has been submitted and approved. A list of people invited and/or in attendance must be attached to the transaction in Chrome River. Meals must be in compliance with the UL Lafayette Special Meals rates and must be for a bona fide University business purpose.
- Employee's individual meals while traveling must be paid for personally, and then reimbursed through a Chrome River expense report. The cost of individual meals are NOT an allowable expense on the LaCarte card.
- Personal Purchases – State business only (No fans, heaters, office decorations, coffee pots, etc.)
- Equipment or furniture (taggable assets) over \$1,000 (even though Single Transaction Limit is \$5,000) unless approved by UL Lafayette LaCarte/Travel Office
- Software over \$100.00, internal or external hard drives, unless prior written approval is given by the IT Department by emailing deviceapprovals@louisiana.edu (Written approval must be attached to the transaction in Chrome River). The Technology tile shall be chosen in Chrome River when reconciling charge.
- Fuel for rental or state vehicles is allowed; however, gasoline purchased for personal vehicles is NEVER allowed. Fuel purchased from Enterprise, Hertz, or National is NEVER allowed.
- Purchase of uniforms is prohibited unless special permission has been granted by the UL Lafayette LaCarte/Travel Office via an approved Promo form. To be granted permission, a staff uniform requirement must be included in your Departmental Policy. On your Chrome River expense report for uniforms. A copy of the approved Promo form, a copy of the Determination of Taxability Form (found on the Purchasing website), and the names of employees and dollar amount that will be spent for each person shall be attached to the Chrome River expense report. Note: Uniforms are considered a fringe benefit. The cost of uniforms provided to employees may be taxable and included on the employee's W-2. Clothing that is considered a supply (such as lab coats, work gloves, safety vests, etc.) is an allowable purchase.

- Any type of promotional items or gifts intended to be given away to staff, or the general public is prohibited. Exceptions may be granted for UL Lafayette students or potential students with the approval of a “Promotional, Logo Imprinted, Award Items Approval Form” (PUR-106 found on Purchasing website).
- Awards and trophies for students are permitted with an approved Promotional Items form and may not exceed \$50. Items are to be engraved with the recipient’s name, name of award, or award place (1st Place, 2nd Place, 3rd Place, etc.). Awards and trophies are not allowed for staff, faculty or the general public (i.e. retirement plaques, Teacher of the Year trophies, Donor of the Year plaques, etc.).
- Any items purchased with UL Lafayette branding (logo, UL name, fleur de lis, etc.), must come from a vendor licensed to print the UL branding (clothing, banners, signs, etc.). For the list of licensed vendors, see the UL Communications and Marketing website. These items must be approved prior to purchase by completing a “Promotional, Logo Imprinted, Award Items Approval Form” (PUR-106 found on Purchasing website).
- Purchases from vendors that issue receipts without itemizing the charges (Hobby Lobby, Party City, etc.). Receipts must include the description of the item, quantity, unit price, freight charge (if applicable), and tax (which should be \$0.00).
- Postage stamps (Postage applied by the U.S. Post Office, UPS or FedEx is allowed, but not the purchase of individual stamps to be kept on hand.)
- Memberships to professional organizations are allowed; however, memberships such as Amazon Prime, Sam’s Club and Costco are not allowed.
- Online accounts, such as Amazon, eBay, etc., must have a standalone business account or registration and must not be combined with an individual’s personal account. Upon request, cardholder is to provide proof that account is set up as a separate business account by providing a list of processed transactions printed from the vendor’s website.
- UL Lafayette has a business account setup that offers Amazon Prime on eligible orders. Please email lacarte@louisiana.edu to set up a UL Lafayette Amazon Business account. You are not allowed to purchase personal items using your UL Lafayette Amazon Business account.

Important Things to Remember:

- Any “pattern” of misuse may cause cancellation of the Purchasing Card and/or disciplinary action. All transactions are to be reconciled in Chrome River.
- To reduce the risk of fraud, if a LaCarte cardholder is on extended leave the card profile shall be reduced to a \$.01 limit or shall be suspended. Once the cardholder returns to work, the profile shall be returned to the original limit.
- Cards that remain dormant for a twelve (12) month period shall be canceled.
- Purchases cannot exceed \$5,000.00, or the single transaction limit, including shipping and handling.
- Purchases shall not be artificially divided (“split purchases”). Splitting purchases to keep each of the transactions within the limits of the Purchasing Card is not authorized. Multiple purchases to the same vendor on the same day or within a few days are allowed, if the total

dollar amount of the purchases to that vendor does not exceed the cardholder's single transaction limit. Purchases made utilizing a state contract must adhere to the same policy. Violation of this policy may cause cancellation of the Purchasing Card and/or disciplinary action.

- UL Lafayette is exempt from Louisiana state sales taxes on all purchases, including but not limited to meals and hotels within the state of Louisiana. Cardholder shall notify vendor of UL Lafayette's tax-exempt status prior to any transaction. UL Lafayette's tax exemption number is printed on the front of the LaCarte Purchasing Card for easy reference. Cardholder shall not fill out any tax exemption forms.
- To avoid tax being charged, on-line orders should be called in if the order form does not provide a place to enter UL Lafayette's tax identification number. If tax is inadvertently charged, it is the cardholder's responsibility to have the tax credited back to their account within 30 days of the transaction being made. If this is not possible, the cardholder will be responsible for reimbursing the taxes back to the university.
- Some vendors require their own Tax-Exempt Account Numbers instead of the one printed on the top of the LaCarte card. These vendors are: Home Depot Lowe's , and Office Depot . Wal-Mart (contact UL Lafayette's LaCarte/Travel Office for a tax-exempt card), and Best Buy (requires that the cardholder apply online for a tax-exempt card).
- In the event a vendor participates in a program where reward points are earned, gift cards are issued as incentives, etc., cardholder may ONLY use these earnings toward the purchase of state goods. The rewards must NOT be used for personal use.
- The LaCarte Purchasing Card cannot be transferred, assigned to, or used by anyone other than the designated cardholder.
- If items are being shipped, the cardholder must provide vendor with complete shipping address along with cardholder's name, department, building, room number, post office box and telephone number. Cardholder must ensure that shipments of merchandise are sent directly to the requesting department. Cardholder must not have items shipped to Central Receiving unless Central Receiving is notified in advance, along with the reason the item cannot be shipped to the requesting department. **Cardholder must not have packages delivered to their home address unless special permission has been granted by the UL Lafayette LaCarte/Travel Office.**
- Registration fees for webinars, on-line courses and conferences are permitted charges on the LaCarte card.
- Registration fees for virtual conferences are not considered travel, and do not require a Pre-Approval in Chrome River.
- If a conference is anywhere but the UL Lafayette campus, it is considered travel and a Travel Pre-Approval must be submitted through Chrome River, even if no other expenses are claimed except the registration fee.
- **No LaCarte cardholder may pay for travel expenses for other employees.** The cardholder MAY NOT pay for registration, lodging, airfare, rental vehicles, etc. for anyone but themselves. The only exception to this is when traveling with students. Please contact UL Lafayette's LaCarte/Travel Office for more details concerning student travel.
- Cardholder shall assure that prices paid are fair and reasonable by comparing prices from more than one vendor.

- Cardholder shall obtain original, itemized supporting documentation for each transaction, and shall verify all information on document.
- Any pre-approved exceptions to LaCarte Card purchases must be in writing from the UL Lafayette LaCarte/Travel Office. Written documentation of approval must be attached to the transaction in Chrome River.
- Any purchases not allowed on the LaCarte card shall be submitted on a Purchase Requisition through Banner.
- If there are issues with transactions in Chrome River, the transactions will be adjusted (if possible) or returned to the cardholder's Chrome River dashboard. An email will be sent from the Chrome River system notifying the cardholder of what has been changed, or of what needs to be corrected. If the transaction is not corrected, the transaction will be charged to NREIMB ("Due from Employee" account) and deducted from the cardholder's paycheck.

SPECIAL MEALS:

Special Meals are meals consisting of two or more people. Meals where one or more people entertain a job candidate or invited guest, or an employee working meeting where a meal or refreshments are served are considered Special Meals and require approval via a Special Meals Pre-Approval in Chrome River. Once approved, the meal can be paid for with a LaCarte card or with personal funds.

A numbered list of attendees or a sign-in sheet, including their affiliation with the university, and an itemized receipt must be attached to the Expense Report in Chrome River. If more than 15 people are invited to the function, a flyer or email showing who was invited may substitute for an actual list of attendees; however, the number of anticipated attendees must be provided.

Note: When using a LaCarte card, the cardholder must have "General Purchasing" privileges on their LaCarte card, or the transaction will be declined.

Special Meals per person rates follow the current GSA rates for the area in which the meal is held.

The current rate (10/21/24 – 6/30/25) for Lafayette is:

- \$16 Breakfast
- \$19 Lunch
- \$28 Dinner
- \$5.50 Refreshments (If all day event, one refreshment is allowed during morning session and another during afternoon session.)

Delivery fees, service fees, out of state taxes, china rental, and cups, plates and utensils are added to the cost of the food when calculating the per person rate. A tip of up to 20% of the allowable subtotal, before any added fees, is allowed in addition to the meal rate. Louisiana state taxes are not allowed. Room rental charges, tents, tables, chairs, fountains, chafing dishes, linens, bartenders/servers, and/or audio-visual equipment rental are to be invoiced separately, and are not added into the per person cost of the meal. **Non-cash fees are not added to the cost of the food when calculating the per person rate.**

If alcohol is served, a separate receipt must be issued and paid for with personal funds. If Foundation

funds are to be requested, a Foundation Warrant may be submitted for reimbursement to the employee. Alcohol can NEVER be charged on the LaCarte card.

INVITED GUESTS:

A request for bringing a job candidate or other invited guest to the university must be submitted on a Pre-Approval through Chrome River. The invited guest will be responsible for paying for their own travel expenses and then submitting receipts for reimbursement (if this has been agreed upon) to the person who submitted the Pre-Approval. Invited Guests cannot claim the daily Travel Meal Allowance. They must turn in receipts for reimbursement. UL Lafayette will not reimburse the guest for any alcohol purchases.

Guests are responsible for paying their own travel expenses and seeking reimbursement, the state travel regulations apply (no state sales tax, GSA rates for lodging and meals, etc.). LaCarte cardholders shall not pay for airfare for invited guests or job candidates.

The estimated cost of any personal meals that the guest will have, must be included in the amount of the Pre-Approval. The cost of the meals that will be provided **with** UL Lafayette staff/faculty as a group, will be encumbered on a Special Meals Pre-Approval instead.

If the invited guest is traveling to Lafayette as part of a Professional Services contract (Professional, Consulting, Personal, etc.), travel expenses should be included in the contract and not submitted through Chrome River.

TRAVEL:

The LaCarte card is required for airfare, registration, rental vehicles and lodging.

- **AIRFARE AND AGENCY FEES** – Must be paid for with traveler's LaCarte card and must be booked through Christopherson Business Travel.
 - International travel must comply with the Fly America Act. This is only applicable if federal funds are used. Note: Not all flights booked through Christopherson Business Travel comply with the Fly America Act.
 - Christopherson Business Travel charges a \$7.00 agency fee for booking a flight online. If flights are booked through a representative, the agency fee is \$24.00 for domestic, \$31.00 for international. Flights booked for 10 or more people will be charged \$21 for domestic and \$29 for international. Flights should not be booked by phone after 5:00pm or on weekends unless it is for an emergency flight.
 - Standby charges and seat reservation fees are not allowed.

Note:

- Traveler may be granted a one-time approval to bypass Christopherson Business Travel, if there is a savings of \$100 or more. **Prior to booking the flight**, the traveler must provide the following information to the UL Lafayette LaCarte/Travel Office, who will obtain written approval from the Office of State Travel:
 - A quote from Christopherson Business Travel
 - A quote from the cheaper agency
 - An email from a Christopherson representative stating that Christopherson cannot match or beat the other agency's price (Christopherson Business Travel may not have all flights listed on their website.)

- All of this information must be emailed to Kassie Clark at kassie.clark@louisiana.edu, who will in turn attempt to get permission from the Office of State Travel.
 - Travelers wishing to include personal travel days must have the additional days approved through UL Lafayette's LaCarte/Travel Office prior to booking the airfare. If personal days require booking a multi-city flight that will stop in a different location for the personal days, the traveler must provide a quote from Christopherson showing that this route is equal or less than a flight for business purposes. UL Lafayette will only be responsible for the lowest logical airfare to the approved destination. If the lowest logical airfare quote is not provided, the entire airfare charge will be denied and coded to Non-Reimbursable (NREIMB). UL Lafayette will not pay for food, lodging, or any other expenses during personal travel days.
 - University approved travel days are 1 day prior to the conference and returning the day after the end of the conference for domestic conferences, and leaving 2 days prior to the conference and returning the day after the end of the conference for international conferences. If more days are needed, justification and prior approval is required by UL Lafayette's LaCarte/Travel Office.
- **HOTEL/LODGING** – Must be paid for with the traveler's LaCarte card, and the university will only be responsible for PPM-49 (GSA) allowable rates for the area, unless otherwise approved.
 - If staying at a conference hotel, the conference rate is permitted even if over the allowable state rate.
 - If a hotel is not available within the allowable rate, permission may be granted to pay up to 50% higher than the allowable GSA rate. This request and justification must be submitted on the Pre-Approval in the Business Purpose field or the Description field of the Pre-Approval and must be approved by Department Head, prior to making the reservations.
 - Allowable state rate is per person. (Example: If the allowable rate is \$96/night and 2 people with approved Travel Pre-Approvals are sharing a room, then the allowable rate for that room is \$192/night.) Each person must pay for their share of the room with their own LaCarte card. Hotel must issue a separate invoice to each person.
 - Hotel incidentals are not allowed to be paid for with the LaCarte card.
 - Internet services are allowed on the LaCarte card.
 - Hotel receipts must be itemized showing daily room rates. Invoice cannot only show an average price per day.
 - Mandatory lodging fees, such as resort fees, urban destination fees, facility fees, amenity fees, etc. are allowed but are to be included in the nightly room rate.
 - Airbnb stays are allowed. Service charges and cleaning fees are allowed but are added to the nightly room rate.
 - Tax Recovery Charges are not allowed.
 - Hotel Cancellation fees must be support by valid business justification and documentation demonstrating the cancellation was unavailable. Avoidable no-show charges remain the responsibility of the traveler.
- **RENTAL VEHICLES** – Cardholder must use state contracted rental agencies.
 - In-state or Out-of-state rentals must be from Enterprise , Hertz or National
 - Pricing includes Collision Damage Waiver and a one-million-dollar liability insurance.
 - The purchase of fuel from rental agencies is prohibited.
 - In-state rental vehicle reservations shall not be made at an airport location for daily routine travel unless prior approval is granted by the department head.
 - Cardholders are only allowed to rent Compact or Intermediate-sized vehicles unless more than 2 people will be riding in vehicle. Cardholder must provide list of passengers and each passenger's Travel Pre-Approval number, if renting a larger vehicle. Larger vehicles must be requested on the Pre-Approval with documentation provided as to why a larger vehicle is required. Premium vehicles are not allowed.
 - ORM Driver's Safety course is required prior to submitting the Pre-Approval for the trip and renting vehicle.
 - No student (undergrad or grad student) is allowed to drive on behalf of the university, unless they are an approved driver for the University by completing ORM Driver safety. .

- **PERSONAL VEHICLE MILEAGE** - Personal vehicle mileage is reimbursed at the published GSA rate for mileage. No fuel will be paid in addition to the mileage reimbursement.
 - ORM Driver's Safety course is required prior to submitting the Pre-Approval for the trip.
 - When two or more people travel in the same personally owned vehicle, only one reimbursement is allowed for the expense of the vehicle. The person claiming reimbursement shall report the names of the other passengers on the travel expense form.
 - For in-state travel, if no rental or state vehicle is available, travelers may be reimbursed for up to 99 miles.
 - Mapquest is required.
 - For out of state travel, mileage reimbursements must not exceed the cost of the lowest logical airfare for the same trip. Travelers are personally responsible for any other expenses in route to and from the destination, which includes meals and lodging. If the lowest logical airfare quote is not provided on the Pre-Approval, traveler will only receive mileage reimbursement for 99 miles.
 - If a traveler is requested to take their personally owned vehicle out-of-state for a purpose that will benefit the agency, then the department head may, on a case-by-case basis, agree to pay a traveler for all or part of in route travel expenses (for example – lodging, meals, and mileage). Documentation must be kept on file to show cost savings or justification as to why personal vehicle mileage, lodging, and meals while in transit were approved for out-of-state travel exceeding 99 miles.
 - Travelers are required to pay all operating expenses for their personal vehicle including fuel, repairs, and insurance.
- **PARKING** – Required on LaCarte card, if credit card is accepted. You must be an approved driver with the University for parking to be allowed.
 - Baton Rouge Airport (\$8.00/day - must provide airport certificate to get contracted rate) – receipt is required.
- US Park's uncovered parking is reimbursable with receipts at \$16.00/day plus tax
- Airport surface Lot - reimbursable with receipts at \$20.00/day
- Airline Economy Garage - reimbursable with receipts at \$12.00/day - off property (credit card only)
 - Lafayette Airport – No contract rate, but traveler should park in Long-term Parking.
- **AIRLINE BAGGAGE FEES**
 - For trips 5 days or less, 1 checked bag is allowed.
 - For trips exceeding 5 days, 2 checked bags are allowed.
- **SHUTTLE SERVICE AND GROUND TRANSPORTATION** – Required on LaCarte card, if credit card is accepted.
 - Tips must be included on the receipt from the vendor and may not exceed 20% of the allowable total charge.
 - Reimbursement is limited to the standard/economy service level offered by the transportation provider (for Uber that is UberX, for Lyft it is Lyft). Any upgrade, premium, luxury, comfort, priority, black, black excel, executive, or similar service level is not allowed.
 - XL Services may be allowable when transporting two or more travelers in group travel or when previously approved when needing to transport equipment, consistent with PPM49.
 - Wait time fees are not reimbursable.
- **TRAVEL ADVANCES**
 Traveler categories listed below must have an original and itemized receipt to support all expenditures in which a cash advance was given, including meals.

Cash advances may be allowed for:

- State traveler whose salary is less than \$ 40,000/year.
- State travelers who accompany and/or are responsible for students, or athletes for group

travel. For group travel advancements, a roster with signatures of each group member along with the amount of funds received by each group member may be substituted for individual receipts.

- **HOLD HARMLESS STATEMENTS**

If a non-employee is traveling in a state or rented vehicle, whether or not they are driving, they are required to complete a "Hold Harmless - Non-State Employee use of State Vehicle Acknowledgement." This form must be attached to the Pre-Approval. This includes UL Lafayette buses, rented or state-owned vehicles.

- **STUDENT TRAVEL**

- Students should follow PPM-49 rules and regulations.
- When a UL Lafayette staff or faculty member is traveling with a group of students and will be with the students for the duration of the trip, only one (1) Group Travel Pre-Approval is required. The Pre-Approval should be completed in the staff/faculty member's name with the list of all students attached. If the university will be covering the cost of meals for the students, the staff/faculty member should request an advance for the meals.
- If the staff/faculty member and students are eating as a group, the faculty member is allowed to pay for the entire meal with their LaCarte card. A receipt is required and must be in compliance with the GSA rates for that area. These meal rates must include tax (if applicable). Receipt may not include alcohol.
- Rewards or benefits earned in connection with University group travel may only be accepted if they are allocated to a University-controlled account and are used for official University business purposes.
- The staff/faculty member is also allowed to pay for the students' airfare, baggage fees, ground transportation and lodging with their own LaCarte card. **This is the only time that a LaCarte cardholder is allowed to pay for another person's travel expenses.**

When a student travels, their airfare, lodging and rental vehicle may be paid for by the UL Lafayette staff/faculty member that is submitting the Pre-Approval for the student, and their LaCarte card may be used.

Note: If the staff/faculty member is not with the students for the entire trip (Ex: Faculty member may go a few days before the students to prepare for a presentation, etc. and then the students travel at a different time and meet the faculty member at the location.), individual Pre-Approvals must be submitted for each person. Staff/faculty cannot give their LaCarte card to the student at any time during travels.

INCIDENTAL EXPENSES NOT ALLOWED ON THE LACARTE CARD:

- Employee Individual Meals
 - Travel meals are reimbursed as per the GSA rates. First and last days of travel are reimbursed at 75% of the daily rate regardless of travel start and end times.
 - Travelers are **not allowed** to claim breakfast reimbursement when a continental/full breakfast is included in a conference schedule/agenda.

IMPORTANT THINGS TO REMEMBER ABOUT TRAVEL:

- You must present a personal credit card when checking into a hotel to cover any incidental charges.
- Louisiana state sales tax should never be paid on meals, hotels, in-state vehicle rentals.

- Only the cardholder's (or students or invited guests) travel expenses are allowed on the LaCarte card.
- A Travel Pre-Approval must be completed for ALL travel prior to travel dates.
- Cardholder **MUST NOT** request reimbursement for expenses that were paid for with the LaCarte.
- Tips for baggage (airport and hotel) are no longer reimbursable. GSA daily meal allowance includes an incidental fee that is to be used for this purpose.
- **ONLY** airfare should be booked through Christopherson. Lodging should be booked directly through the hotel or conference website, and rental vehicles must be booked directly through the rental agency.

GENERAL TRAVEL PROCEDURES:

Prior to the trip:

- Traveler **MUST** have an approved Chrome River Pre-Approval prior to any event away from the UL Lafayette campus, with the exception of local travel within the bordering parishes to Lafayette Parish. A Pre-Approval is required for local travel if any expenses will be incurred.
- Once the Pre-Approval has been completely approved in Chrome River, the traveler is free to make their travel arrangements (i.e. pay registration fee, reserve vehicle and hotel, and make flight arrangements, etc.) using their LaCarte card. Expenses incurred prior to the approval of a Travel Pre-Approval may be deemed non-compliant and may become the responsibility of the traveler.

Following the trip:

- An Expense Report must be submitted in Chrome River within 30 days following the last day of the trip.
 - All travel expenses prior to July 1st each year, must be submitted by July 15th, even if this is less than 30 days after end of trip. No out-of-pocket reimbursements will be paid if submitted after July 15th.
- Travel Advances must be cleared within 30 days of the trip. Clearing a Travel Advance requires submission of all receipts and any unused money. The total of the receipts and unused money must equal the amount of the advance.
- Travel reimbursements will be issued within 30 days of receipt of the approved Expense Report.
- Out of pocket expenses must be submitted within the fiscal year they are incurred.

CONTACT INFORMATION

Assistant Director: VACANT

Travel Manager: Kassie Clark, Program Administrator
(337) 482-6250
kassie.clark@louisiana.edu

LaCarte Cards: Michelle Kreamer, Program Administrator
(337) 482-5309
michelle.kreamer@louisiana.edu

Travel: Tiffany Leblanc, Program Administrator
(337) 482-6244
tiffany.leblanc@louisiana.edu