

Guidelines

Update Log

1Mar17 – Updates to *Liability and Comprehensive General Liability Insurance, Travel Arrangement and Reimbursement/Non-Standard Travel Arrangements & Travel Insurance*

19 Dec16 – Updates to *Travel, Meals and Appendix B – Invoice Examples* sections.

2 Dec16 – Updates were made to the *Airline Travel, Meals, Invoicing, Schedule Changes and Sample Invoices* sections.

Texas A&M University (TAMU) will issue the Technician Pool Technician a 1-year Marine Technician Services Agreement. Additionally, each deployment will have a Services Supplement that outlines the specifics of that deployment. The Technician may be hired to fulfill various roles within the UNOLS fleet and beyond. Specific duties and responsibilities will depend on the receiving institution (Host Institution), the cruise requirements and the role to be filled. The UNOLS TSM will work with a Host Institution Point of Contact (POC) to define the duties prior to the cruise. Further duties may arise during the cruise due to the ever-changing conditions at sea. Any issues pertaining to shipboard duties, technical matters, or science requests should be funneled to the Host Institution POC and the UNOLS TSM.

Any issues pertaining to shipboard safety or harassment must be reported through the ship's chain of command and CC'ed to receiving institution's POC and UNOLS TSM.

Compensation:

The Marine Technician Services Agreement will outline an on-shore rate (8hrs/day), an at-sea rate (12hrs/day) and an hourly compensation rate for hours work over 8hrs/day. Compensation will be based on the following guidelines:

- At-sea days will be charged at the at-sea rate
- Mob/Demob days (maximum of 1 to 2 days before and after the cruise) will be paid as at-sea days
- On-Shore days that are not mob/demob days will be paid at the on-shore rate
- For deployments with extensive shore time or mixed shore/sea time, the technician will take one day off per week
- Overtime is permitted only with prior approval from the Host Institution POC
- The Host Institution POC must approve the Technician's time prior to submitting the invoice to TAMU.
- Travel days are compensated at the on-shore rate (8hr/day)
- The technician will not be paid for personal travel days

Travel Arrangement and Reimbursement

The Technician, the UNOLS TSM and the host institution will agree upon dates prior to making travel arrangements. The technician will make his/her own travel arrangements and will be reimbursed by TAMU after travel is complete. Travel receipts are required as outlined here in Appendix A of this document. Travel must be as direct as possible within reason. Any layover in travel that requires lodging to be billed to TAMU must be pre-approved.

Airline Travel:

Details on Travel and especially airline travel can be found in *Exhibit B Section 1* of the Technician Services Agreement. In addition to receipts for airline travel, the technician must also submit all boarding passes corresponding to those receipts.

Direct travel to the destination should be booked wherever possible. Any pre-planned overnight stays on the way to or from a deployment that are intended to be charged to TAMU must be verified by TAMU prior to the purchase of the ticket. Pre-planned overnight stays will not be covered by TAMU unless they are pre-approved. This does not include overnight stays that occur due to air travel issues (delayed flights, etc).

Flight Selection

The lowest priced airfares shall be selected consistent with the technician's convenience for departure and/or arrival needs. Direct flights should be selected as a first choice. Generally, flights should require no more than one stop or no more than one hour spent on the ground, however cost must be considered. Certified U.S. flag carriers must be used, except under limited circumstances.

Class of Service

Economy class air travel (supersavers, apex, or economy coach fares) will be used exclusively, except when a doctor's note is submitted, in advance, for a legitimate health reason.

Changes in the airline industry pricing structures have allowed passengers to upgrade their seating while remaining in the same "class" of seats (i.e. coach vs. first class). Should an individual wish to avail themselves of these additional seat choices it will be done at the technician's cost.

Frequent Flyer Benefits

Under no circumstances will an employee be permitted to alter cost efficient travel plans in order to achieve frequent flyer benefits. TAMU will not reimburse an employee when frequent flyer credits are used.

Lost and Unused Tickets Travelers should treat airline tickets with the same regard for security as cash. Lost or missing tickets should be reported immediately. All unused tickets should be returned for credit immediately to the travel agency the ticket was purchased from.

Personal Travel

Personal stopovers are allowable only within the fare structure of the authorized travel. Additional fares are the responsibility of the traveler. A quote for the "business only" travel itinerary must be obtained and submitted with the reimbursement invoice. The personal portion should be noted on itinerary.

Lodging:

Whenever possible, the technician will embark directly onto the ship and avoid lodging expenses. Where this is not possible, and with enough advanced notice, TAMU will set-up and pre-pay for lodging. In the case where pre-payment is not possible, the technician will pay for his/her lodging and submit an invoice for reimbursement. TAMU will only reimburse up to the government per diem as outlined here:

<http://www.gsa.gov/portal/content/104877>

For longer on-shore projects, the Technician will stay on the ship when reasonable. If the ship is not an option, the UNOLS TSM will work with the host institution to arrange cost-effective lodging. The lodging arrangement will be outlined in the deployment's Services Supplement.

Meals:

On Travel Days, the technician can bill up to the government per diem rates can be found there: <http://gsa.gov/portal/content/104877>. Receipts are required for all reimbursements.

The technician will eat onboard the vessel whenever the vessel is in port. The contract will not pay for meals when shipboard meals are an option. The Technician can choose to eat off the ship but cannot expect reimbursement for these meals. For periods of extended shore time, the technician will eat onboard the vessel whenever the vessel is in port. When the vessel is not in port, the technician will receive a set meal allowance as outlined in their Services Supplement. The amount of the meal allowance will depend on the location of the shore time.

"Non-Standard" Travel Arrangements

There may be cases where non-standard travel options make more sense and are actually cheaper. Some examples are a lay-over or first/business class travel. Debz MUST be informed prior to booking any non-standard travel. Documentation and justification are key. I have often been of the mind

“do and ask for forgiveness” but in this case, it is not a good idea due to risk in not getting your travel reimbursed.

Travel Insurance

The Pool will not pay for travel insurance. If you choose to obtain this, it will be at your own expense.

Travel Mileage:

When reimbursement is to be made for the actual mileage, the beginning and ending odometer readings and the duty points must be documented on the travel voucher and with a picture of the odometer. An example is as follows:

Beginning Odometer Reading: 12,345
From College Station, headquarters to IBT in Houston, and TAMUG in Galveston.
Return to College Station.
Ending Odometer Reading: 12,630
Total Miles: 285

If odometer readings are not available, a Google Map (or similar) that documents the mileage from Point A to Point B is acceptable.

State and federal mileage rates can be found here:

<http://fmo.tamu.edu/accounts-payable/travel/docs/mileage-rates/> In the case of long distance travel, mileage will only be reimbursed up to the cost of an airline ticket.

In the case where the Technician would rather drive their personal vehicle than fly to a deployment, travel mileage will be reimbursed only up to the cost of an airline ticket.

Schedule Changes

The expected deployment dates are listed on the Services Supplement. If the schedule changes from the Services Supplement in any way, it is imperative that the Technician informs both TAMU and the UNOLS Technical Services Manager *before* the changes occur. Schedule changes could result in increased costs, which could affect the host institution and also the Technician's contract.

Invoicing

Details are important when invoicing. When on a long deployment, invoices can be submitted once every two weeks. They may not be submitted more often but can be submitted less often if that is convenient. Invoices for foreign travel must include the exchange rate used to calculate the invoice.

TAMU can set-up direct deposit or submit a check. Direct deposit must be set-up with TAMU prior to the first invoice. If a check is chosen, the invoice should clearly indicate where the check should be sent. If possible, travel expenses to and from the ship should be submitted at the end of the trip.

Sample invoices can be found in Appendix B. An editable version is available through TAMU.

General information:

The invoice must include the following general information:

- Technician Name
- Technician Contact Information
- Invoices should be addressed to:
Debz DeFreitas
Geochemical & Environmental Research Group
Texas A&M University
833 Graham Road
College Station, TX 77845
Phone: (979) 458-9322
debz@gerg.tamu.edu

- Description of the Project (e.g. Technical support onboard the RV ATLANTIS supporting Dr. Bailey
- 5January16 to 16 January 16)
- Invoice number
- Date of the Invoice

Travel Days and Expenses

Travel days and expenses should be separated from days onboard the ship. See Appendix B Travel Expenses for a complete example invoice.

At-Sea days and Ashore Support

Invoicing for days worked on the cruise shall indicate which days are worked at which. See Appendix B Travel Expenses for a complete example invoice.

Vessel Policies and Procedures

Each vessel has different policies and procedures. It is the responsibility of the Technician to understand and abide by those policies and procedures. Any issues regarding the policies and procedures should be brought up with the host institution POC. Anything needing immediate action, especially those regarding shipboard safety or harassment, should be brought through the ship's chain of command and CC'ed to receiving institution's POC and the UNOLS TSM.

Assessments / Reviews

The UNOLS TSM will conduct a post-cruise debrief with both the Technician and the receiving institutions. Any issues will be discussed amongst the relevant parties. The UNOLS TSM will conduct an annual review of each Tech Pool Technician to review the previous year cruises and the cruises and goals for the coming year.

Please contact Debz DeFreitas (debz@gerg.tamu.edu) and Alice Doyle (alice@unols.org) if there are any questions or issues with the above guidelines.

Liability and Comprehensive General Liability Insurance

TAMU has procured a Maritime Employers Liability (MEL) Insurance Policy (what we commonly refer to as Workers Compensation) specifically for the Tech Pool technicians. MEL coverage is standard work related coverage for people who work over water. This policy is separate from TAMU's DOMESTIC workers comp policy (for university employees), which is not designed to cover maritime injuries. This may sound trivial but makes a big difference.

If anything happens, Debz is the best contact for insurance claims. She will get in contact with the right folks at TAMU insurance who will in turn get you hooked up with the insurance company who hosts the policy.

The levels of coverage are as follows:

Workers Compensation	\$5,000,000 Bodily injury by accident \$100,000 Bodily injury by disease \$500,000 Bodily injury by disease included
Comprehensive General Liability	\$1,000,000 per occurrence/\$2,000,000 aggregate

No additional coverage is required to work in the Tech Pool. The Technician can elect for further insurance but this is up to him/her.

Appendix A

TAMU Travel Receipt Checklist

Travel Expense	In State	Out of State	Foreign
General Info	<ul style="list-style-type: none"> -Travel Website http://fmo.tamu.edu/accounts-payable/travel/ -Disbursement Guidelines http://fmo.tamu.edu/media/64789/disbursement_manual.pdf -At the discretion of the department head the actual expenses for meals and lodging may be reimbursed. -Local funds do not have to follow STMP guidelines regarding the use of contract vendors -For any receipt that does not show payment information proof of payment will be required 	<ul style="list-style-type: none"> -At the discretion of the department head the actual expenses for meals and lodging can be reimbursed. -Local funds do not have to follow STMP guidelines regarding the use of contract vendors -For any receipt that does not show payment information proof of payment will be required 	<ul style="list-style-type: none"> -Travel Advisories- countries with travel advisories requires prior approval of the President
Airfare	<p>Required Receipt must contain:</p> <ul style="list-style-type: none"> -Name of Passenger -Airline Ticket Number -Class of Flight-if business class must be approved by the Dean or appropriate Vice Pres -Itinerary-dates and all flight segments -Method of Payment -Amount 	<p>Required Receipt must contain:</p> <ul style="list-style-type: none"> -Name of Passenger -Airline Ticket Number -Class of Flight-if business class must be approved by the Dean or appropriate Vice Pres -Itinerary-dates and all flight segments -Method of Payment -Amount 	<p>Required Receipt must contain:</p> <ul style="list-style-type: none"> -Name of Passenger -Airline Ticket Number -Class of Flight-if business class must be approved by the Dean or appropriate Vice Pres -Itinerary-dates and all flight segments -Method of Payment -Amount
Airline Fees	<ul style="list-style-type: none"> -Checked bags- One Checked bag allowed unless there are extenuating circumstances (must be documented) -Early Boarding- Business justification must be documented 	<ul style="list-style-type: none"> -Checked bags- One Checked bag allowed unless there are extenuating circumstances (must be documented) -Early Boarding- Business justification must be documented 	<ul style="list-style-type: none"> -Checked bags- One Checked bag allowed unless there are extenuating circumstances (must be documented) -Early Boarding- Business justification must be documented
Taxis, Shuttles, Buses and Trains (Between City Transportation)	<p>Required Receipt must contain:</p> <ul style="list-style-type: none"> -Itinerary -Class-first class must be approved in the same manner as airfare -Amount of Fare 	<p>Required Receipt must contain:</p> <ul style="list-style-type: none"> -Itinerary -Class-first class must be approved in the same manner as airfare -Amount of Fare 	<p>Required Receipt must contain:</p> <ul style="list-style-type: none"> -Itinerary -Class-first class must be approved in the same manner as airfare -Amount of Fare
Taxis, Shuttles, Buses and Trains (In City Transportation)	<p>Must provide:</p> <ul style="list-style-type: none"> -Origin and destination -Date -Amount 	<p>Must provide:</p> <ul style="list-style-type: none"> -Origin and destination -Date -Amount 	<p>Must provide:</p> <ul style="list-style-type: none"> -Origin and destination -Date -Amount
Rental Cars - Preferred Vendors Avis Enterprise - National	<p>Required Receipt must contain:</p> <ul style="list-style-type: none"> -Name of renter -Dates of rental -Itemization of all charges -Method of payment -LDW/CDW is the only reimbursable insurance (included in contract rate) 	<p>Required Receipt must contain:</p> <ul style="list-style-type: none"> -Name of renter -Dates of rental -Itemization of all charges -Method of payment -LDW/CDW is the only reimbursable insurance (included in contract rate) 	<p>Required Receipt must contain:</p> <ul style="list-style-type: none"> -Name of renter -Dates of rental -Itemization of all charges -Method of payment -LDW/CDW is the only reimbursable insurance (included in contract rate)
Mileage (up to the Federal Mileage Rate)	<p>Documentation of mileage must be from:</p> <ul style="list-style-type: none"> -Concur mileage calculator 	<p>Same as in state except that a cost comparison must be done</p> <ul style="list-style-type: none"> -Mileage will only be paid up to the 	<p>Should not have mileage for Foreign travel with the exception for mileage to</p>

TAMU

Travel Expense Receipt Checklist

	or -Odometer readings with a point to point breakdown Mileage can only be claimed for one car out of every 4 employees that have the same itinerary. Gas can not be claimed if mileage is claimed	lowest available cost of airfare plus any rental car or in state mileage to get to the airport.	and from airport.
Meals	Must provide: -Day by Day breakdown for the actual cost of meals see www.gsa.gov for acceptable allowances	Must provide: -Day by Day breakdown for the actual cost of meals see www.gsa.gov for acceptable allowances	Must provide: -Day by Day breakdown for the actual cost of meals see www.gsa.gov for acceptable allowances
Lodging	Required Receipt must contain: -Name of guest -Itemization of all expenses charged (day by day) -Payment or method of payment -May not be reimbursed for Texas Hotel Occupancy Tax	Required Receipt must contain: -Name of guest -Itemization of all expenses charged (day by day) -Payment or method of payment -May not be reimbursed for Texas Hotel Occupancy Tax	Required Receipt must contain: -Name of guest -Itemization of all expenses charged (day by day) -Payment or method of payment -May not be reimbursed for Texas Hotel Occupancy Tax
Parking	Must provide: -Date -Location -Amount for each parking expense incurred	Must provide: -Date -Location -Amount for each parking expense incurred	Must provide: -Date -Location -Amount for each parking expense incurred
Incidentals	Must document what expense was for and amount	Must document what expense was for and amount	Must document what expense was for and amount
Tolls	Must provide location and amount	Must provide location and amount	Must provide location and amount
Phone/Internet	Must document expense was incurred for business use	Must document expense was incurred for business use	Must document expense was incurred for business use
Gasoline	Must document date and amount	Must document date and amount	Must document date and amount
Registration	Required Receipt must document: -name of the person attending -full name of conference (no abbreviations) -dates of conference	Required Receipt must document: -name of the person attending -full name of conference (no abbreviations) -dates of conference	Required Receipt must document: -name of the person attending -full name of conference (no abbreviations) -dates of conference

Appendix B

Example Invoices

Travel Days plus Expenses

[Technician Name]

[Technician Physical Address]

[Technician Physical Address]

[Technician Phone Number]

[Technician Email address]

INVOICE

INVOICE #[NUMBER HERE]
DATE: [DATE HERE]

To:

Debz DeFreitas
Geochemical & Environmental Research Group
Texas A&M University
833 Graham Road
College Station, TX 77845
Phone: (979) 458-9322
debz@gerg.tamu.edu

For:

Project Title: UNOLS Marine Technical Pool
Project Description: **[Enter Deployment Name and Dates]**
[Enter Cruise Principal Investigator and any other Key Information]

DESCRIPTION	DAYS	RATE	AMOUNT
Travel from: [start location] to [end location]			
At Sea Day Rate [Enter Specific Date(s) Here]	0	[Rate]	[Total Days* Rate]
Ashore Day Rate [Enter Specific Date(s) Here]	[Total Days]	[Rate]	[Total Days* Rate]
Travel Expenses: <i>NOTE: ENTER EACH RECEIPT SEPARATELY</i> Meals: see attached receipt(s) Airfare: see attached receipt(s) Baggage: see attached receipt(s) Shuttle/Taxi: see attached receipt(s)			
TOTAL			

Please direct deposit payment as per W-9 previously submitted
Payment terms: payment due within 30 days

Technical Support

[Technician Name]
[Technician Physical Address]
[Technician Physical Address]
[Technician Phone Number]
[Technician Email address]

INVOICE

INVOICE # **[NUMBER HERE]**
 DATE: **[DATE HERE]**

To:

Debz DeFreitas
 Geochemical & Environmental Research Group
 Texas A&M University
 833 Graham Road
 College Station, TX 77845
 Phone: (979) 458-9322
 debz@gerg.tamu.edu

For:

Marine Technical support for
[Enter Deployment Name and Dates]
[Enter Cruise Principal Investigator and any other Key Information]

DESCRIPTION	DAYS	RATE	AMOUNT
At Sea Day Rate [Enter Specific Date(s) Here]	[Total Days]	[Rate]	[Total Days* Rate]
Ashore Day Rate [Enter Specific Date(s) Here]	[Total Days]	[Rate]	[Total Days* Rate]
TOTAL			

Please direct deposit payment as per W-9 previously submitted
 Payment terms: payment due within 30 days