

## Travel Handbook

All travel must be approved 3 weeks prior to departure in writing. There are two (2) forms: School of Mathematical & Statistical Sciences (SoMSS) Travel Request and the University Travel Authorization on-line or paper form, both must be completed prior to departure.

### INSTRUCTIONS

- Complete SoMSS Travel Request Form 3 weeks prior to travel
- Receive approval
- Complete either on-line or paper Travel Authorization Form
- If you plan to rent a car at any time during travel it is **mandatory** that ALL travelers need to complete the on-line defensive driving exam. New policy for car rental can be found EHAS 119 <http://uabf.asu.edu/node/1629>
- If you want a cash advance all requests should be made 3 weeks prior to trip
- Use commercial airlines – the lowest available fare should be chosen.
- Airfare cost savings can sometimes be obtained if you extend your trip to include a weekend stay
- Additional lodging and per diem expenses are reimbursable if the weekend stay occurs in the city where the conference/meeting was held and if the additional expenses are less than the costs that you would have incurred if you traveled on a weekday.
- By land: you may travel by train or bus, but will need advance approval from your VP if standard air service is available.
- Private vehicle: when you use a privately owned vehicle for official business, you will be reimbursed for mileage. However, if you take your car when you could have taken a plane, you cannot claim more than the airfare plus incidental in-town transportation that would have been allowed for the same trip by public transportation
- Car rentals: ASU has agreements with several different car rental companies. When reserving a car, request a standard vehicle. You will pay for the rental and then be reimbursed by the university because ASU does not accept billing from car rental agencies. Make sure you have receipts to be reimbursed for gasoline purchases.
- **Insurance Note: University employee business travelers are covered by State of Arizona Risk Management liability insurance and should decline any additional insurance offered by the car rental agency. This rule does not apply in foreign countries.**
- Bring back all required documents to submit claim
- If you have questions contact Santa Young ([santa@asu.edu](mailto:santa@asu.edu))

## OVERVIEW

1. **Complete the SoMSS Travel Request Form found on the Department webpage**  
<http://math.asu.edu/information.html>
  - a. New features
  - b. Electronic form goes directly to Santa for review
  - c. Dr. Raskind will indicate the \$\$ amount approved
  - d. Purpose/Justification needs to be completed thoroughly
  - e. Request for title of talk if giving a presentation
  - f. **Car Rental Policy – MANDATORY Defensive driving required**  
[http://uabf.asu.edu/ehs\\_training](http://uabf.asu.edu/ehs_training)
  - g. Travel guide website provided for your review
  - h. This document still needs to be completed even if no funds are requested when traveling on ASU business
  - i. When requesting funds be sure to use the correct per diem amount for the city/country you are traveling to. Within the U.S. visit:  
[http://www.gao.gov/publications/SAAM/Supp\\_I\\_trvrates-012308.pdf](http://www.gao.gov/publications/SAAM/Supp_I_trvrates-012308.pdf)  
for foreign travel visit: [http://aoprals.state.gov/web920/per\\_diem.asp](http://aoprals.state.gov/web920/per_diem.asp)  
for currency converter visit: <http://www.oanda.com/>
2. Santa will review it to make sure it is complete; if it is not complete she will send it back to you.
3. Completed forms will be sent to Dr. Raskind for approval.
4. Once approved, she will inform the traveler via email that his/her travel has been approved.
5. Santa will advise and instruct the traveler to enter the data to their on-line travel form.
6. The on-line form is used for in-state travel or out-of-state for 7 days or less.
7. For travel out of the country Santa will complete the form for you and ask you to stop by to sign it.
8. Once signed, she will obtain the appropriate signatures and fax it to the Travel Office if a cash advance is requested.

**NOTE:** Traveler's should never leave without completing a travel authorization. This is for your protection. If you leave on ASU business then this authorization provides insurance for you. If you are not requesting funds you still need to complete a paper form for insurance purposes.

9. For the on-line travel form use Santa (santaann) as the manager and Marie Lawrence (stoli44) as the ATO.
10. Original Documents needed for travel claim: **Food receipts are not needed for per diem**
  - a. Paid Hotel receipt
  - b. Airfare itinerary including the cost paid by card
  - c. Paid Registration receipt
  - d. Paid taxi receipts over \$50
  - e. Copy of Conference Program
  - f. Page from Conference Program listing your talk
  - g. Page from Conference Program showing hotel you stayed at was Conference hotel
  - h. If personal car was used, provide 3 quotes for airfares showing that the use of personal car would be more cost efficient.

When you return, you will need to go back into the on-line document and enter in your "actual costs" from the trip, hit submit and then bring the original receipts to Santa Young (PSA 231).

If you are traveling out of the country, then you need to submit your receipts directly to Santa **with a written summary of your receipts.**

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## **TRAVEL TYPE**

### **In-State Travel:**

- Must have odometer readings, street address, major cross roads or map miles for mileage reimbursement.
- Mileage reimbursement rate is 44.5 cents per mile
- Lodging must have itemized receipt showing payment and the hotels address/logo on it
- Receipts with thorough justification.
- Attach copy of program showing name, location and beginning and ending dates of meetings/conferences etc.

### **Out-of-State:**

- Justification: The public purpose indicating specific reason for trip/meeting, name of hosting organization and benefits to ASU.
- Lodging: original receipt and copy of conference announcement of program that shows the lodging rate, meals provided, and opening and closing dates.
- Attach copy of program showing name, location and beginning and ending dates of meetings/conferences etc

### **Foreign Travel:**

- Federal Foreign Rates World Wide Web  
[http://aoprals.state.gov/content.asp?content\\_id=184&menu\\_id=78](http://aoprals.state.gov/content.asp?content_id=184&menu_id=78)
- Allocate per diem rates for individual meals as follows: 20% for breakfast, 25% for lunch and 55% for dinner.
- Travel should record exchange rates during travel on that particular day expensed when ever possible. Attach copy of program showing name, location and beginning and ending dates of meetings/conferences etc

### **Group Travel:**

- Team or group travel FIN507 <http://www.asu.edu/aad/manuals/fin/fin507.html>
- Travel involving three or more persons, with one employee responsible for all expenses.

### **Receipts**

- Meal and lodging – allowable rates by city, country and state index  
[www.asu.edu/fs/travel/perdiem.html](http://www.asu.edu/fs/travel/perdiem.html) and for foreign  
[http://aoprals.state.gov/content.asp?content\\_id=184&menu\\_id=78](http://aoprals.state.gov/content.asp?content_id=184&menu_id=78)
- Conference lodging may exceed index if conference brochure includes designated hotel information
- Meetings held by university departments requiring overnight stay may not be held at establishments where room rate exceeds the maximum allowable rate in lodging index.
- Individual may claim only reimbursement for the room in which he/she stayed. Each individual is responsible for their own lodging expense when a room is shared.

- No receipts are required for food, but keep in mind the following:
  1. Breakfast – travel status on or before 6:00 a.m. and in overnight travel status
  2. Lunch – overnight travel status and leaves on or before 11:00 a.m. and ends at or after 2:00 p.m.
  3. Dinner – leaves for overnight travel status on or before 6:00 p.m. and ends at or after 8:00 p.m. on return day
  4. In-State travel: Must be out past 50 miles from post of duty and in overnight travel status to claim meals. 1<sup>st</sup> lunch eligibility will be 12:00 p.m. and 6:00 p.m. for dinner
- Airfare reimbursement requires a passenger coupon or itinerary/invoice for ticket less travel that includes time/date of arrival and departure.
- Local transportation requires original receipt if cost of single ride is more than \$50.
- If traveler is using a canceled check as a receipt for expenses other than lodging, a photocopy of both sides of canceled check are required.
- Airport storage or parking for privately owned vehicles is allowed only if less than taxi fares to and from the airport and requires a receipt.

### **On-Line Travel Authorization:**

#### **You will need the following information prior to completing the on-line travel:**

1. Your ASURITE ID and password to log in
2. Departure/return dates and times
3. Zip codes – one for each destination (either hotel or event location) to calculate per diem rates
4. Estimated expenses, including air fare or other transportation, hotel, event registration and miscellaneous
5. Optional: account number(s) you will use to pay for your trip. If you do not know the number Santa can enter that information when she reviews the document.

#### **Steps to create your on-line travel document**

1. Log on to MyASU
2. Click on Travel & Reimbursements
3. Click on MyASU – Authorization & Reimbursements
4. Click on My Trips
5. Click on New Request
6. Complete the form – be sure you click the button “save and continue” after each section
7. After completing document click the “submit” button at the end.
8. If you have more than one destination back to back trip be sure to enter in the information for each event/city

### **Foreign Travel:**

Santa will create the document for you.

If you become dazed and confused Santa is available to meet with you one on one in your individual office and walk you through the process. Email: [santa@asu.edu](mailto:santa@asu.edu)

**Helpful websites to visit:**

**FIN502:** <http://www.asu.edu/aad/manuals/fin/fin502.html>

**FIN504:** In-State Travel <http://www.asu.edu/aad/manuals/fin/fin504.html>

**FIN505:** Out-of-State Travel <http://www.asu.edu/aad/manuals/fin/fin505.html>

**FIN 505-02:** Out-of-State Travel Reimbursement  
<http://www.asu.edu/aad/manuals/fin/fin505-02.html>

**FIN506:** Foreign Travel <http://www.asu.edu/aad/manuals/fin/fin506.html>

**FIN509:** Meals & Lodging <http://www.asu.edu/aad/manuals/fin/fin509.html>

**ASU Travel** – [www.asu.edu/fs/travel/traveln.html](http://www.asu.edu/fs/travel/traveln.html) (General travel policy information, travel guide, ATO list, lodging & per diem index)

**NACO** – [www.naco.org](http://www.naco.org) (collects information on counties & cities within a state)

**Financial Services** – [www.sbs.asu.edu/travel/tform.html](http://www.sbs.asu.edu/travel/tform.html) (for on-line travel authorization claim form)